



pennie[®]



Agency & Agency Manager Account Creation Guide

Overview

Pennie uses a modern and proven technology platform trusted by State-based Marketplaces across the country. While the platform offers customers tools to apply, shop, compare, and enroll in comprehensive health and dental coverage, there are also tools available specifically designed for brokers to assist in serving and managing customers.

This guide will review the steps needed to create an **Agency and Agency Manager account**. For assistance creating an **Agent (Broker) Account**, please refer to our [Agent \(Broker\) Account Claiming Guide](#).


Jump to:

Account types

Which account type is right for you?

Pennie accounts are designed to help you and your business serve Pennsylvania customers. You will want to register for the account that best fits your business and situation.

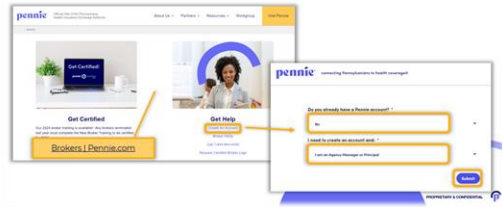
<p>Agency/Agency Manager Accounts are for:</p> <ul style="list-style-type: none"> • Brokers who work on their own outside a multi-broker agency • Supervisors/managers of agencies with two or more brokers • Supervisors/managers of an insurance organization, or • Supervisors/managers of broker call centers 	<p>Agent/Broker Accounts are for Individual agents who work within/are:</p> <ul style="list-style-type: none"> • A brokerage agency amongst other brokers • Call centers • Insurance organizations ("Captive" agents), or • Agents that are not a manager or supervisor
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Account creation

Agency/Agency Manager Account Creation

An Agency can easily create a business profile in Pennie that will help them manage their book of business, assign brokers, transfer customers, and much more. To get started, follow the path below:



Which account type is right for you?

Pennie accounts are designed to help you and your business serve Pennsylvania customers. You will want to register for the account that best fits your business and situation.

Agency/Agency Manager Accounts are for:

- Brokers who work on their own outside a multi-broker agency
- Supervisors/managers of agencies with two or more brokers
- Supervisors/managers of an insurance organization, *or*
- Supervisors/managers of broker call centers

Agent/Broker Accounts are for Individual agents who work within/are:

- A brokerage agency amongst other brokers
- Call centers
- Insurance organizations (“Captive” agents), *or*
- Agents that are not a manager or supervisor

Which account type is right for you?

If you oversee multiple brokers that all work for the same agency, you will want to register as an **Agency Manager**. In the process of creating your account, you will also create an **Agency** account for the business. Through the additional features of the Agency Manager and Agency accounts, you can manage the brokers of the agency and collaborate on behalf of their customers.

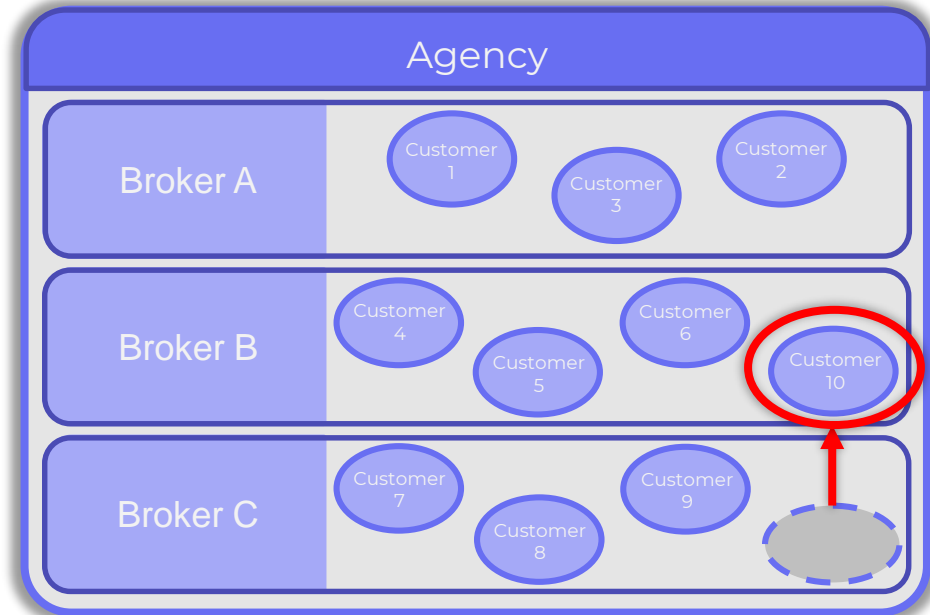
The screenshot displays the 'Agency Dashboard' interface. At the top, there is a navigation bar with the title 'Agency Dashboard' and a menu containing 'Agents', 'Admin Staff', 'Agency Delegations', 'Agency Account', 'My Delegations', and 'My Agent Profile'. Below the navigation bar, there is a 'Refine Results By' section with a 'Reset All' link and two input fields for 'First Name' and 'Last Name'. The main content area features a table of agents with the following columns: 'Agent Name', 'Active/Inactive', 'Customers', 'Agent License #', 'Certification Status', and 'Actions'. The table lists two agents: 'Janice Broker' (Active, 0 Customers, License # 0999999, Certified) and 'Ted AgencyManager' (Active, 0 Customers, License # 345412, Certified). Below the table, there are two boxes representing customer groups. The first box contains three customer icons labeled 'Customer 1', 'Customer 2', and 'Customer 3'. The second box contains two customer icons labeled 'Customer 4' and 'Customer 5'. Blue arrows point from the 'Janice Broker' and 'Ted AgencyManager' rows in the table to their respective customer groups.

Agent Name	Active/Inactive	Customers	Agent License #	Certification Status	Actions
Janice Broker	Active	0	0999999	Certified	⚙️
Ted AgencyManager	Active	0	345412	Certified	⚙️

Which account type is right for you?

Those with an Agency Manager account can:

- Re-assign customers to another broker within the agency
 - Act on behalf of brokers within the agency (and their customers), including:
 1. Accepting new clients
 2. Viewing statuses of current clients
 3. Acting on behalf of current clients, *and*
 4. Processing paper applications on behalf of a broker
- Note: Customers are notified of any changes



What tools are inside the Agency/Agency Manager Portal?

What can you do with your Pennie Agency/Agency Manager Portal?

1. Easily add brokers to your agency
2. Accept pending customer delegations
3. Easily assign or re-assign customers to other agents when necessary
4. Manage current customers and see their current application status
5. Manage current customers' Data Matching Inconsistencies (DMI) requests or tickets
6. Process an application on your customer's behalf
7. Manage the Agency profile information
8. Manage your Broker profile information, *and*
9. View and export the Book of Business for a single Broker, or the entire Agency

Agency/Agency Manager Account Creation

An Agency can easily create a business profile in Pennie that will help them manage their book of business, assign brokers, transfer customers, and much more. To get started, follow the path below:

The image shows a screenshot of the Pennie website's 'Brokers' page. The page has a navigation bar with 'About Us', 'Partners', 'Resources', 'Workgroup', and 'Visit Pennie'. The main content area is divided into two columns. The left column features a 'Get Certified!' section with a laptop displaying the Pennie Certified logo and a 'Get Certified' button. The right column features a 'Get Help' section with a 'Create An Account' button, 'Broker FAQs', and contact information. A callout box at the bottom left contains the text 'Brokers | Pennie.com'. A form overlay on the right side of the page shows a dropdown menu for 'Do you already have a Pennie account?' with 'No' selected, and another dropdown menu for 'I need to create an account and:' with 'I am an Agency Manager or Principal' selected. A 'Submit' button is located at the bottom right of the form.

Brokers | Pennie.com

Get Certified!
Our 2024 broker training is available! Any brokers terminated last year must complete the New Broker Training to be certified.

Get Help
Create An Account
Broker FAQs
Call 1-844-844-4440
Request Certified Broker Logo

Do you already have a Pennie account? *
No

I need to create an account and: *
I am an Agency Manager or Principal

Submit

Agency/Agency Manager Account Creation

For simplicity, Pennie combines the creation of the Agency Account with the creation of an Agency Manager Account. A primary Account Manager may be an agency principal, a company designate, or another individual with the responsibility of managing their organization's Pennie account and activity.

Steps

1. Agency Information
2. Location and Hours
3. Agency Manager Information
4. Public Profile
5. Document Upload
6. Certification Status

Step 1: Agency Information

Agency Name (Public Facing) *

Legal Business Name *

Federal Tax Id * [What if I don't have an EIN?](#)

Agency License Number *

NEXT

This information is what customers will see on the *Get Help* search

New Agency Manager Account Set-Up

All fields on this form marked with an asterisk (*) are required.


Basic Information

First Name *

Last Name *

Email Address *

Confirm Email Address *

Phone Number * 

Security Question

Security Question * Select


Set Password

Password *

Confirm Password *

Prove You're Not a Robot

Security Code: *

I'm not a robot 

I have read and agree to the [Privacy Policy](#)

Cancel Submit

Agency/Agency Manager Account Creation

At this stage of the Agency Account creation, please ensure that all business information is accurate and current:

Steps

- ✓ Agency Information
- 2. Location and Hours
- 3. Agency Manager Information
- 4. Public Profile
- 5. Document Upload
- 6. Certification Status

Step 2: Agency Location and Hours

— PRIMARY SITE:

Primary Location Name * City Location

Primary Location Email

Primary Contact Number

Address line 1* Street Name, P.O. Box, Corr

Address line 2 Apt, Suite, Unit, Bldg, Floor,

City* City, Town

State* [dropdown]

Zip Code* [input]

Hours Of Operation

Monday [select] To [select] Closed Apply to all weekdays ?

Tuesday [select] To [select] Closed

You can also display your Agency's hours of operation

It's easy to add "sub-sites" – alternate office locations – to your account profile. These will be public-facing so your customers can find the location that is closest to them

Agency/Agency Manager Account Creation

In the process of creating the Agency account, an Agency Manager account is simultaneously created:

Steps

- ✓ Agency Information
- ✓ Location and Hours
- 3. Agency Manager Information
- 4. Profile
- 5. Document Upload
- 6. Certification Status

Step 3: Agency Manager Information

Provide the following information so we can certify you to make your services available on Pennsylvania. After a quick review, we'll send you an email letting you know when your application has been approved.

First Name*

Last Name*

Pennsylvania Agent License Number* (Not your NPN)

Agent NPN*

License Renewal Date*

Individual Email* (Enter broker's email for account activation)

Primary contact number* (Enter broker's cell number for account activation)

Business Contact Phone Number

Alternate Phone Number

Fax Number

Preferred Method of Communication*

Your name, contact information, and NPN will be available for customers to see in your public Pennie profile

If you do not have a FEIN, you can use your SSN number instead (not shown)

Method you prefer customers to communicate with you (phone vs. email)

Agency/Agency Manager Account Creation

An important component to your Pennie Agency profile is an accurate portrayal of your agency's product expertise, the agency's public website, and a thoughtful, customer-facing description to help engage customers:

Steps

- ✓ Agency Information
- ✓ Location and Hours
- ✓ Agency Manager Information
- 4. Profile**
- 5. Document Upload
- 6. Certification Status

Step 4: Public Profile

Provide information about you and your business for your public profile. This information will be viewed by Pennie users looking for agents on exchange. The more information you provide, the more they're likely to contact you.

Clients Served Individuals / Families

Languages

Product Expertise

- Health
- Dental
- Vision
- Life
- Medicare
- Medicaid
- CHIP
- Workers Compensation
- Property/Casualty

Your Website Address

Your Public Email

Education

About Me

Customers will be able to better choose a broker to assist them when they know what product expertise you have, and if you are able to speak any additional languages

Agency/Agency Manager Account Creation

Once your Pennie Agency profile has been created, a system notification will inform you of the Pennie review and approval process.

Note: Because Agency Managers function as a broker with additional system capabilities, they must also:

1. Be licensed by the PA Insurance Department with a Health line of authority, *and*
2. Complete Pennie's Broker Certification Training

Congratulations! You have successfully completed your application for Agency and Agency Manager. Pennsylvania Exchange will review your application for certifying your Agency and Agent account.



A video walkthrough of how to create a new Agency Manager account can be found on Pennie's YouTube page: [Claiming Agency Management Account | YouTube – PenniePA](#).

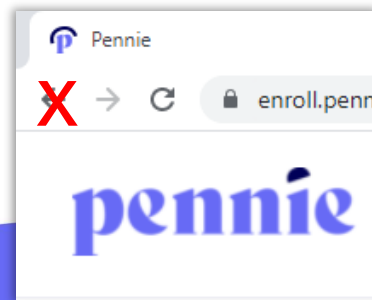
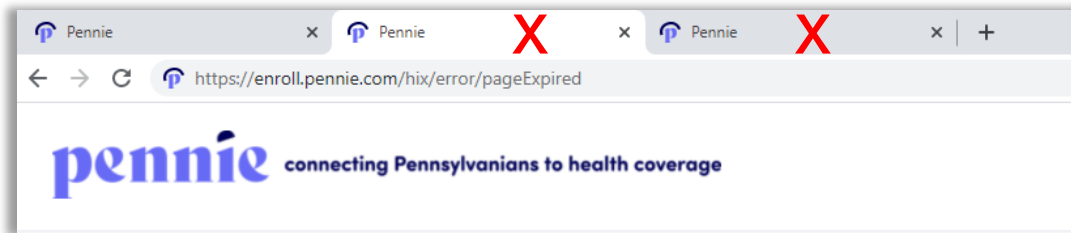
Tips for Using Your Pennie Portal

Only work on **one** customer at a time.

Never have the Pennie Platform open in more than one web browser tab at a time.

Do not use the back button while navigating through the Pennie Platform; using the back button and/or multiple tabs may result in:

1. Privacy and security incidents within the enrollments of your clients or additional Pennie customers
2. Privacy and security incidents within the Agency, Agency Manager or Agent's profiles
3. Incorrect user account information, *and/or*
4. Enrollment errors



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