pennie®

# Assister & Entity/Entity Manager Account Creation Guide

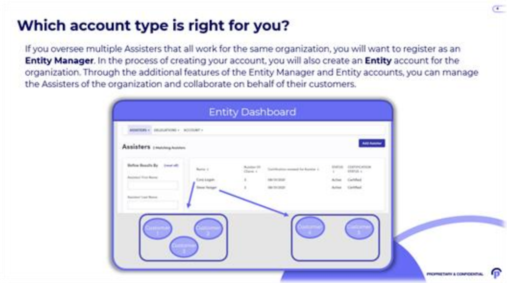
# Overview

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 to aid Assisters in serving and managing their customers.

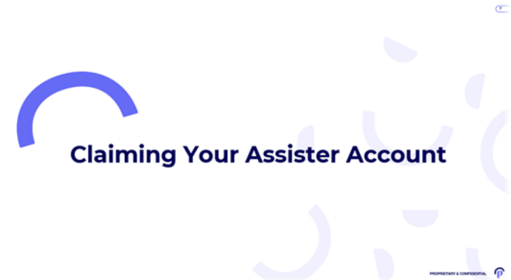
This guide will review the steps needed to create both an **Assister account**, and an **Entity and Entity Manager account**.

Jump to:

[Account types]



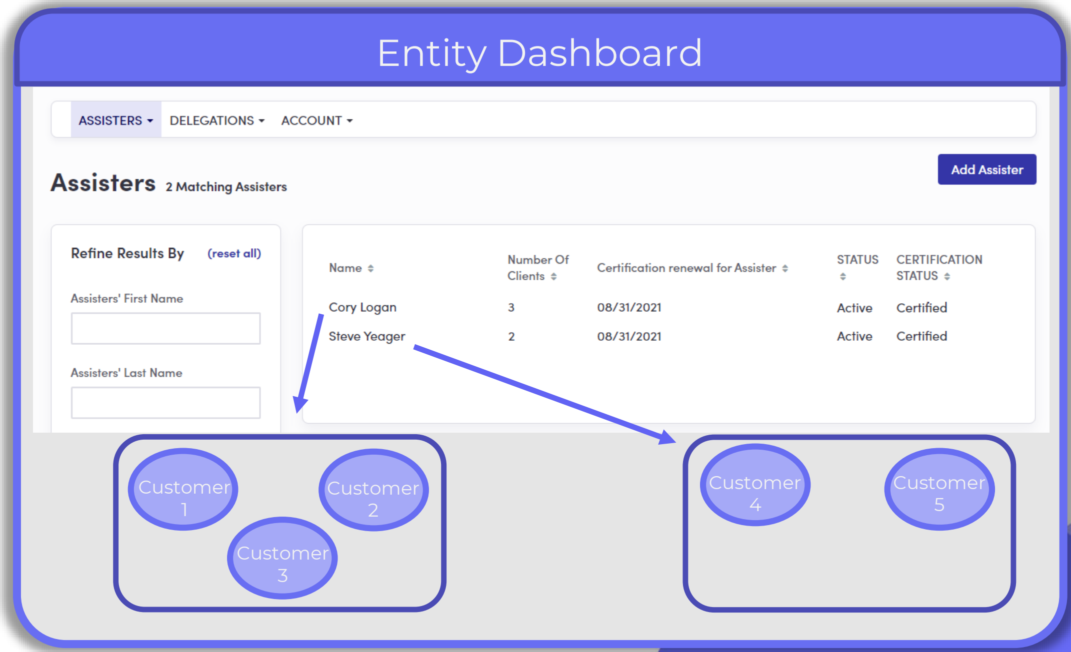

[Assister account creation]




[Entity & Entity Manager account creation]

# Which account type is right for you?

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

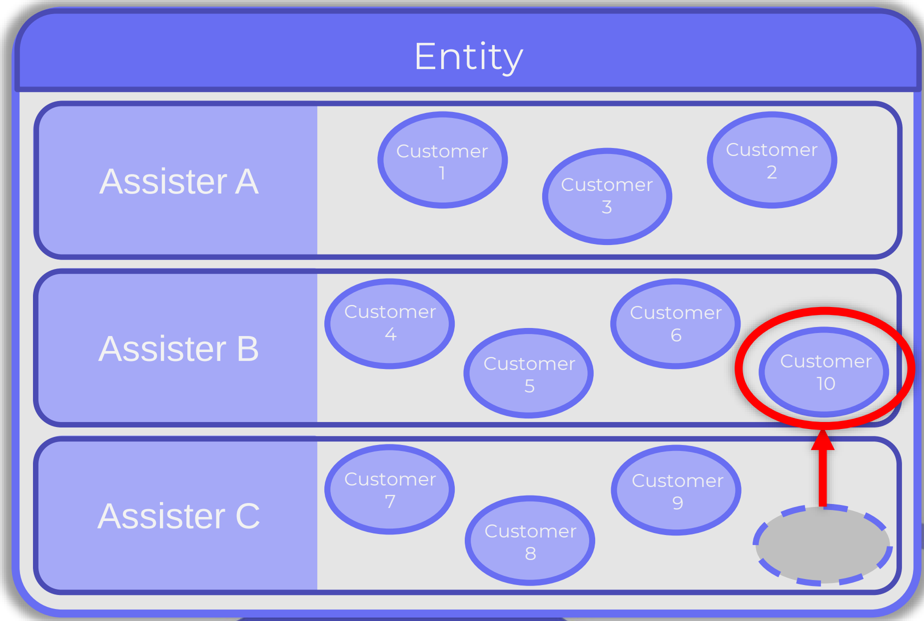


# What tools are inside the Entity Manager Portal?

Those with an Entity Manager account can:

1. Easily add Assisters to your organization
2. Accept pending customer delegations
3. Easily assign or re-assign customers to other Assisters when necessary, *and*
4. View and export the Book of Service for a single Assister, or the entire Entity

→ Note: Customers are notified of any changes



# What tools are inside the Assister Portal?

What can you do with the Pennie Assister Portal?

1. Accept new customers / remove customers from your own Book of Service
2. Manage current customers and see their current application status
3. Manage current customers' Data Matching Inconsistencies (DMI) and other tickets
4. Process an application on your customer's behalf, *and*
5. Manage your Assister profile information

# Claiming Your Assister Account

# Assister Account Creation

The **Entity Manager** assigned to the Entity account **is responsible for initiating the creation of a new Assister account**.

To add an Assister to your organization *who does not currently* have a Pennie account, the Entity Manager simply selects the *Add Assister* button from the Dashboard of their Entity account.

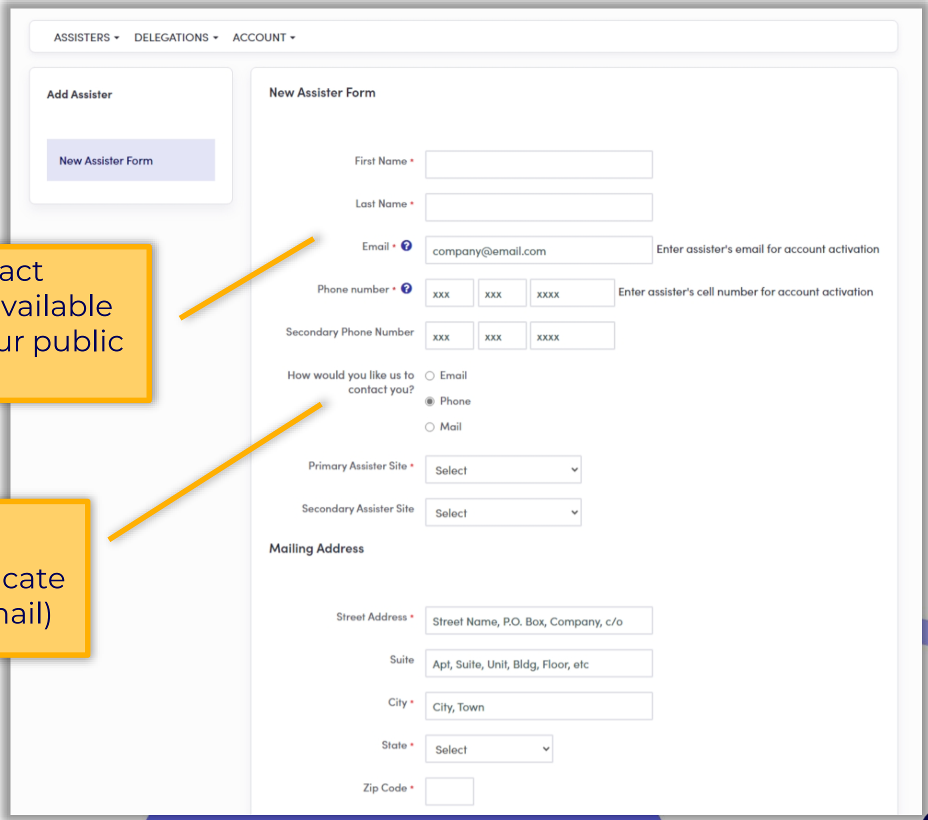
The Entity Manager prefills some of the account information before submitting, which will trigger a link to be sent to the Assister at the email address used to create the account, requesting that they claim the account.

# Completing Your Assister Account

Upon claiming your account, you will verify the information that the Entity Manager prefilled before finishing the set up of the account by adding some additional information and selecting your preferences:

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

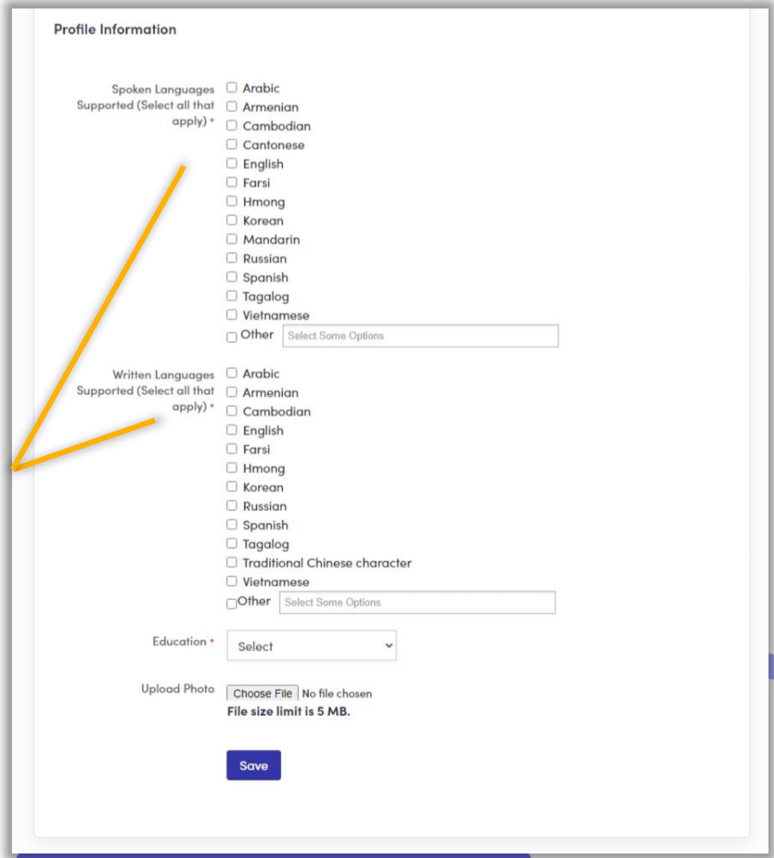
Method you prefer customers to communicate with you (phone vs. email)



# Completing Your Assister Account

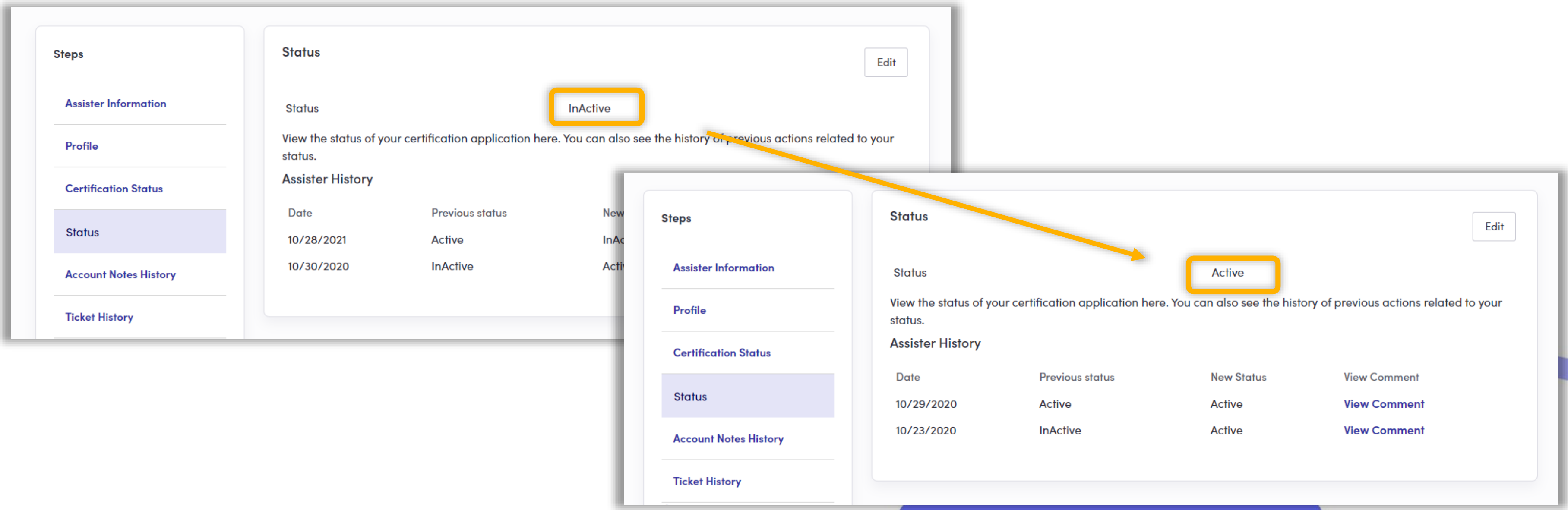
An important component to your Pennie Assister profile is your professional education and language capabilities. This is what customers will see when searching for an Assister:

Customers will be able to better choose as Assister to help them when if they know you are able to speak any additional languages



# Completing Your Assister Account

Once you have completed your Assister account, a system notification will inform you of the Pennie review and approval process. At his point, you must inform your organization's Entity Manager. To trigger the update of your *Certification Status*, the Entity Manager must change your account *Status* from *Inactive* to *Active*:



# Completing Your Assister Account

In order to become Pennie-certified, all Assisters *must*:

1. Be licensed by the PA Insurance Department, *and*

2. Complete Pennie's Assister Certification Training

For a guide on how to register with the PA Insurance Department, please see our PID Registration Guide for Pennie Assisters | Pennie.

For a guide on how to claim and maintain your Assister account, please our Claiming Your Pennie Account Guide | Pennie.

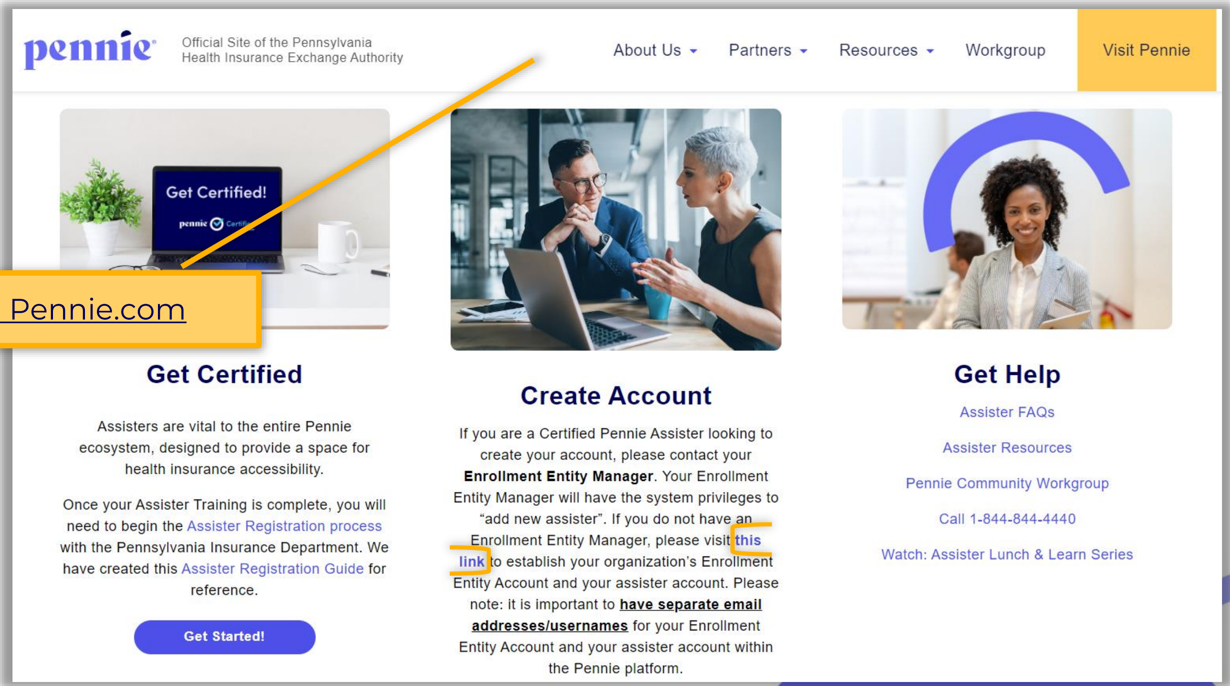
A video walkthrough of how to claim an Assister account along with an overview of the account Dashboard can be found on Pennie's YouTube page: Claiming an Assister Account & Overview of Assister Dashboard | YouTube – PenniePA.

# Creating Your Entity & Entity Manager Accounts

# Entity/Entity Manager Account Creation

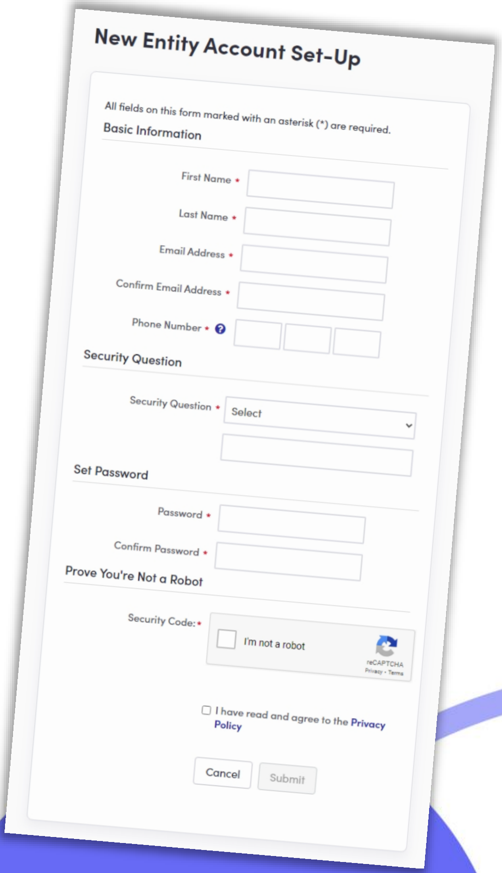
An organization can easily create a business profile in Pennie that will help them manage their Book of Service, assign Assisters, transfer customers, and much more. To get started, follow the path below:

[Assisters | Pennie.com]



# Entity/Entity Manager Account Creation

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

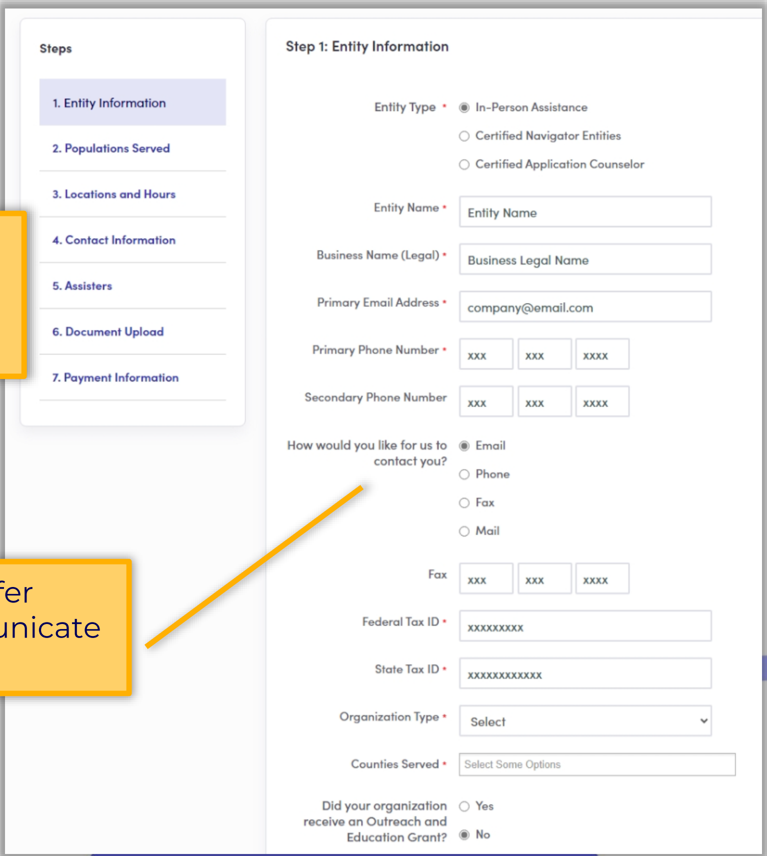


# Entity/Entity Manager Account Creation

At this stage of the Entity account creation, please ensure that all organizational information is accurate and current:

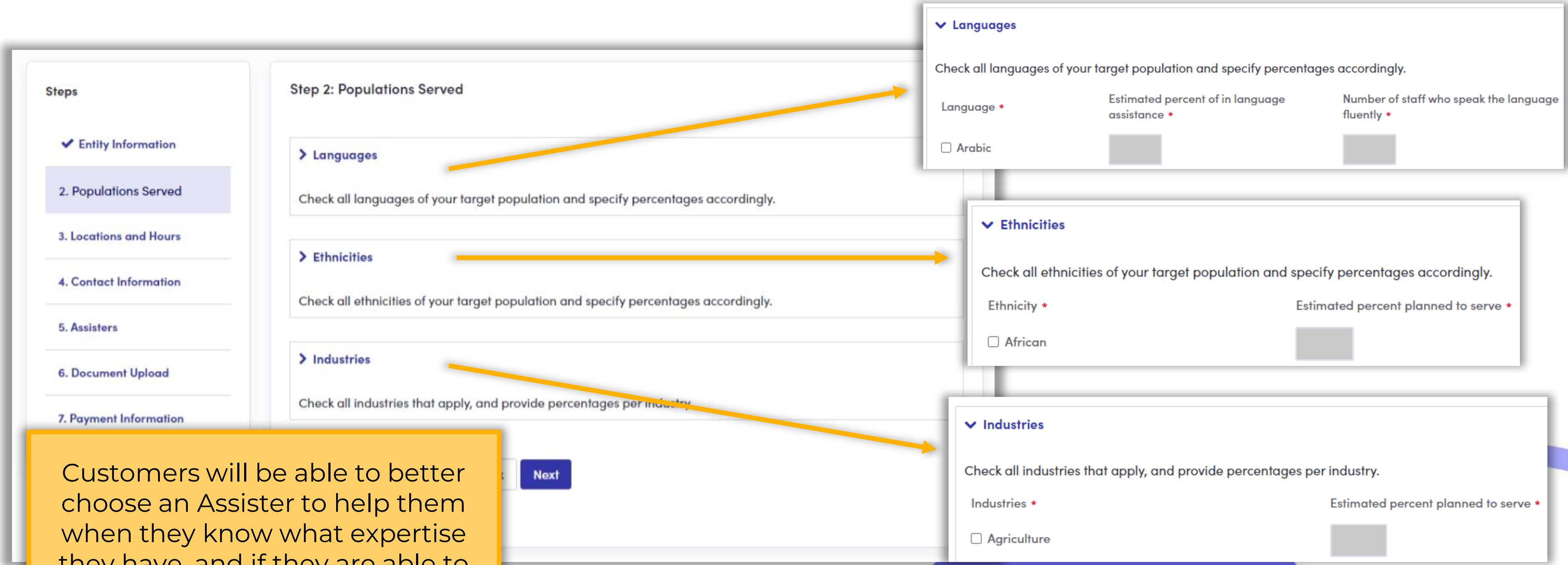
The information entered here is how customers will see your public Pennie profile

Method you prefer customers to communicate with you



# Entity/Entity Manager Account Creation

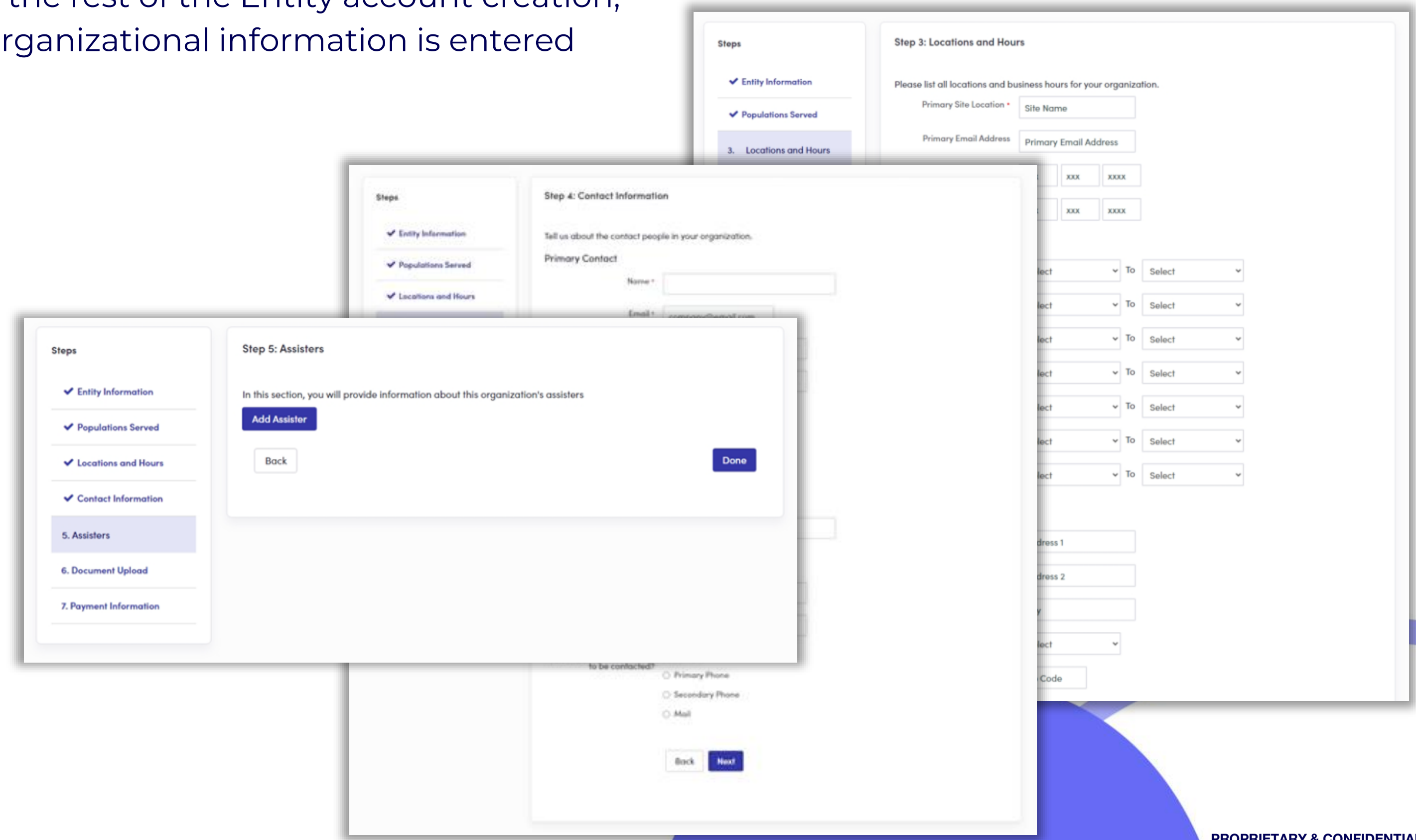
An important component to your Pennie Entity profile is an accurate portrayal of your organization's product expertise, the diversity of your Assister pool, and the types of customers you most frequently serve:




Customers will be able to better choose an Assister to help them when they know what expertise they have, and if they are able to speak any additional languages

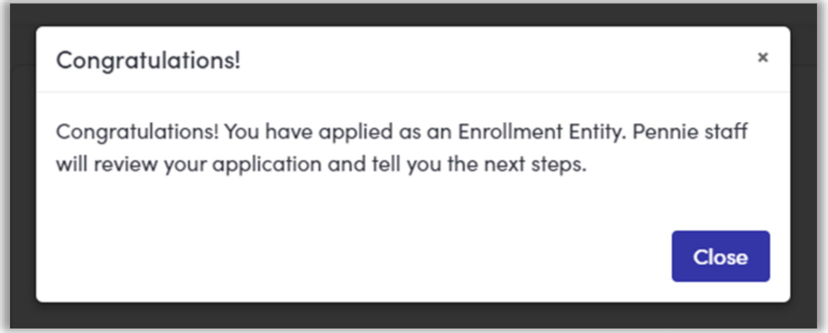
# Entity/Entity Manager Account Creation

Continue through the rest of the Entity account creation, ensuring that all organizational information is entered accurately:



# Entity/Entity Manager Account Creation

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



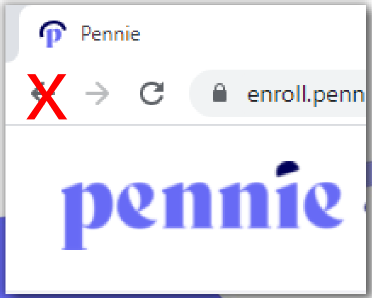
# Tips for Using Your Pennie Portal

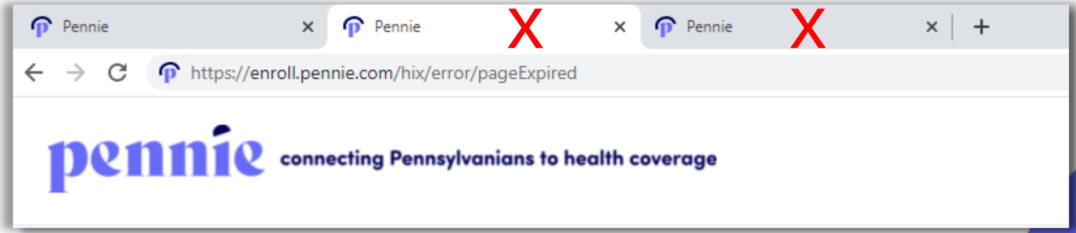
**Only work on one customer at a time**.

**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 Entity, Entity Manager or Assister profiles
3. Incorrect user account information, *and/or*
4. Enrollment errors



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