



**pennie**<sup>®</sup>



# **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

### 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.



## Assister account creation

Claiming Your Assister Account

## Entity & Entity Manager account creation

Creating Your Entity & Entity Manager Accounts

# Which account type is right for you?

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The screenshot displays the 'Entity Dashboard' interface. At the top, there are navigation tabs for 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT'. Below this, the main section is titled 'Assisters' and indicates '2 Matching Assisters'. A 'Refine Results By' section on the left includes input fields for 'Assisters' First Name' and 'Assisters' Last Name'. The central table lists the following data:

Name	Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
Cory Logan	3	08/31/2021	Active	Certified
Steve Yeager	2	08/31/2021	Active	Certified

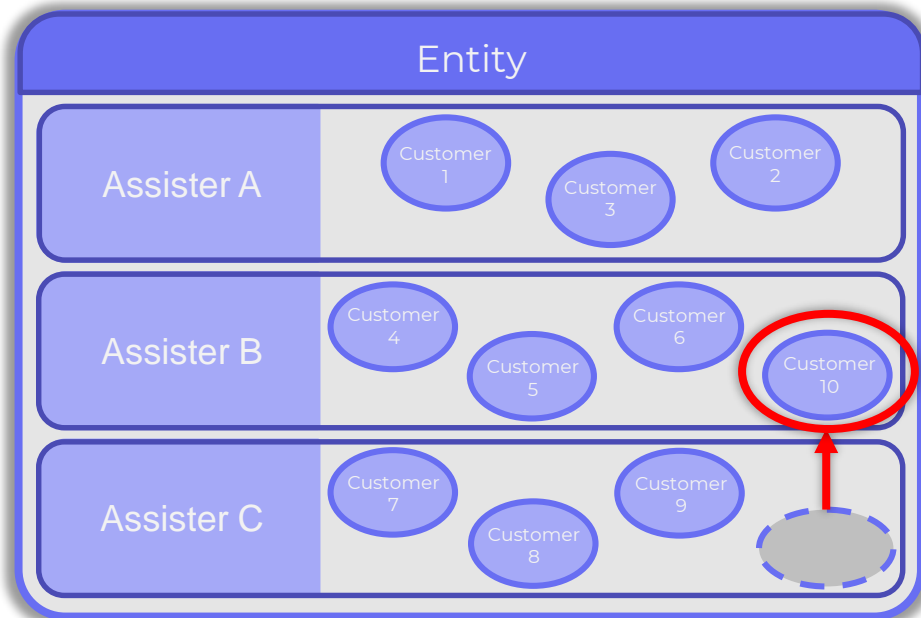
Below the table, there are two groups of customer icons. The first group contains three icons labeled 'Customer 1', 'Customer 2', and 'Customer 3'. The second group contains two icons labeled 'Customer 4' and 'Customer 5'. Blue arrows point from the 'Cory Logan' and 'Steve Yeager' rows in the table to the 'Customer 1' and 'Customer 4' icons respectively.

# What tools are inside the Entity Manager Portal?

Those with an Entity Manager account can:

1. Easily add Assistors to your organization
2. Accept pending customer delegations
3. Easily assign or re-assign customers to other Assistors 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)

ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

Add Assister

New Assister Form

**New Assister Form**

First Name \*

Last Name \*

Email \* company@email.com Enter assister's email for account activation

Phone number \* xxx xxx xxxxx Enter assister's cell number for account activation

Secondary Phone Number xxx xxx xxxxx

How would you like us to contact you?

Email

Phone

Mail

Primary Assister Site \* Select ▾

Secondary Assister Site Select ▾

**Mailing Address**

Street Address \* Street Name, P.O. Box, Company, c/o

Suite Apt, Suite, Unit, Bldg, Floor, etc

City \* City, Town

State \* Select ▾

Zip Code \*

# 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

Profile Information

Spoken Languages Supported (Select all that apply) \*

- Arabic
- Armenian
- Cambodian
- Cantonese
- English
- Farsi
- Hmong
- Korean
- Mandarin
- Russian
- Spanish
- Tagalog
- Vietnamese
- Other

Written Languages Supported (Select all that apply) \*

- Arabic
- Armenian
- Cambodian
- English
- Farsi
- Hmong
- Korean
- Russian
- Spanish
- Tagalog
- Traditional Chinese character
- Vietnamese
- Other

Education \*

Upload Photo  No file chosen  
File size limit is 5 MB.

# 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 this 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*:

The image displays two screenshots of the Assister account interface, illustrating the process of changing the account status from InActive to Active. An orange arrow points from the 'InActive' status in the top screenshot to the 'Active' status in the bottom screenshot.

**Top Screenshot (InActive Status):**

- Steps:** Assister Information, Profile, Certification Status, **Status**, Account Notes History, Ticket History.
- Status:** InActive (highlighted in orange). Edit button.
- Assister History:**

Date	Previous status	New Status
10/28/2021	Active	InActive
10/30/2020	InActive	Active

**Bottom Screenshot (Active Status):**

- Steps:** Assister Information, Profile, Certification Status, **Status**, Account Notes History, Ticket History.
- Status:** Active (highlighted in orange). Edit button.
- Assister History:**

Date	Previous status	New Status	View Comment
10/29/2020	Active	Active	<a href="#">View Comment</a>
10/23/2020	InActive	Active	<a href="#">View Comment</a>

# 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:

The screenshot shows the Pennie website interface. At the top left is the Pennie logo and the text "Official Site of the Pennsylvania Health Insurance Exchange Authority". To the right are navigation links: "About Us", "Partners", "Resources", "Workgroup", and "Visit Pennie". Below the navigation are three main content areas:

- Get Certified:** Features an image of a laptop displaying "Get Certified!" and a "Get Started!" button. A yellow callout box points to the laptop with the text "Assisters | Pennie.com".
- Create Account:** Features an image of two people in a meeting. The text explains that Certified Pennie Assisters can create accounts and contact their Enrollment Entity Manager. It includes a link to the Enrollment Entity Manager page and a note about having separate email addresses/usernames.
- Get Help:** Features an image of a smiling woman. It includes links for "Assister FAQs", "Assister Resources", "Pennie Community Workgroup", and a phone number "Call 1-844-844-4440". It also mentions a "Watch: Assister Lunch & Learn Series".

Assisters | Pennie.com

## Get Certified

Assisters are vital to the entire Pennie ecosystem, designed to provide a space for health insurance accessibility.

Once your Assister Training is complete, you will need to begin the [Assister Registration process](#) with the Pennsylvania Insurance Department. We have created this [Assister Registration Guide](#) for reference.

Get Started!

## Create Account

If you are a Certified Pennie Assister looking to create your account, please contact your **Enrollment Entity Manager**. Your Enrollment Entity Manager will have the system privileges to "add new assister". If you do not have an [Enrollment Entity Manager](#), please visit [this link](#) to establish your organization's Enrollment Entity Account and your assister account. Please note: it is important to **have separate email addresses/usernames** for your Enrollment Entity Account and your assister account within the Pennie platform.

## Get Help

[Assister FAQs](#)

[Assister Resources](#)

[Pennie Community Workgroup](#)

Call 1-844-844-4440

Watch: [Assister Lunch & Learn Series](#)

# 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.

The image shows a screenshot of a web form titled "New Entity Account Set-Up". At the top, it states "All fields on this form marked with an asterisk (\*) are required." The form is divided into several sections:

- Basic Information:** Contains five input fields: "First Name", "Last Name", "Email Address", "Confirm Email Address", and "Phone Number". The "Phone Number" field is split into three separate boxes.
- Security Question:** Features a dropdown menu labeled "Security Question" with "Select" as the current option, and an empty text input field below it.
- Set Password:** Includes two input fields: "Password" and "Confirm Password".
- Prove You're Not a Robot:** Contains a checkbox labeled "I'm not a robot" next to a CAPTCHA image, and another checkbox below it labeled "I have read and agree to the Privacy Policy".

At the bottom of the form, there are two buttons: "Cancel" and "Submit".

# 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

**Steps**

1. Entity Information
2. Populations Served
3. Locations and Hours
4. Contact Information
5. Assistors
6. Document Upload
7. Payment Information

**Step 1: Entity Information**

Entity Type \*  In-Person Assistance  
 Certified Navigator Entities  
 Certified Application Counselor

Entity Name \*

Business Name (Legal) \*

Primary Email Address \*

Primary Phone Number \*

Secondary Phone Number

How would you like for us to contact you?  Email  
 Phone  
 Fax  
 Mail

Fax

Federal Tax ID \*

State Tax ID \*

Organization Type \*

Counties Served \*

Did your organization receive an Outreach and Education Grant?  Yes  
 No



# 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:

**Steps**

- Entity Information
- 2. Populations Served**
- 3. Locations and Hours
- 4. Contact Information
- 5. Assisters
- 6. Document Upload
- 7. Payment Information

**Step 2: Populations Served**

> Languages  
Check all languages of your target population and specify percentages accordingly.

> Ethnicities  
Check all ethnicities of your target population and specify percentages accordingly.

> Industries  
Check all industries that apply, and provide percentages per industry.

Next

**Languages**

Check all languages of your target population and specify percentages accordingly.

Language *	Estimated percent of in language assistance *	Number of staff who speak the language fluently *
<input type="checkbox"/> Arabic	<input type="text"/>	<input type="text"/>

**Ethnicities**

Check all ethnicities of your target population and specify percentages accordingly.

Ethnicity *	Estimated percent planned to serve *
<input type="checkbox"/> African	<input type="text"/>

**Industries**

Check all industries that apply, and provide percentages per industry.

Industries *	Estimated percent planned to serve *
<input type="checkbox"/> Agriculture	<input type="text"/>

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:

The image displays a sequence of screenshots from the account creation process:

- Step 3: Locations and Hours:** A form titled "Please list all locations and business hours for your organization." It includes fields for "Primary Site Location" (with a "Site Name" dropdown), "Primary Email Address", and phone number fields (XXX XXXX).
- Step 4: Contact Information:** A form titled "Tell us about the contact people in your organization." It includes a "Primary Contact" section with "Name" and "Email" fields.
- Step 5: Assistors:** A form titled "In this section, you will provide information about this organization's assistors." It features an "Add Assister" button, a "Back" button, and a "Done" button.

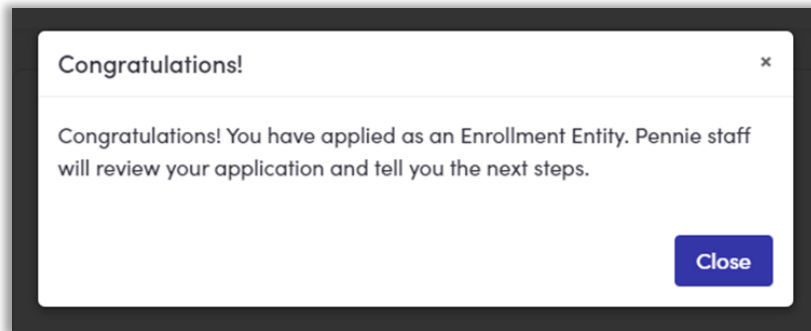
Overlaid on these screenshots is a "Steps" sidebar on the left, which lists the following steps:

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- 5. Assistors
- 6. Document Upload
- 7. Payment Information

At the bottom of the screenshots, there are radio button options for "to be contacted?" including "Primary Phone", "Secondary Phone", and "Mail", along with "Back" and "Next" buttons.

# 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:



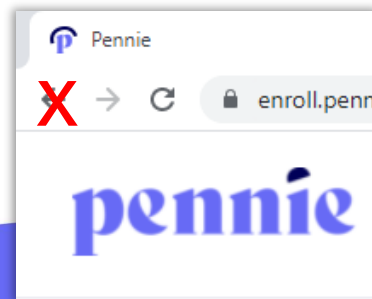
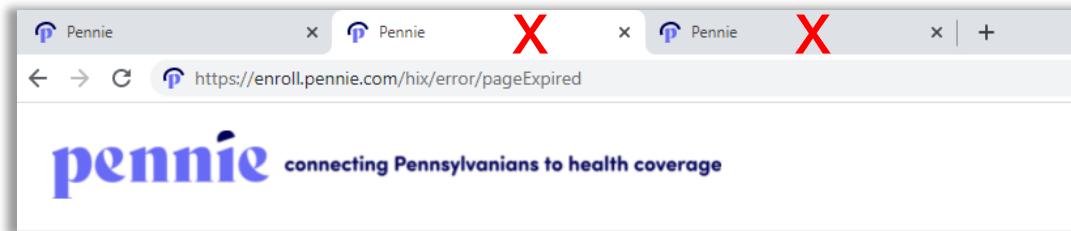
# Tips for Using Your Pennie Portal

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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