

PY27 Cert Training - Assister Agreement

Table of Contents

1. Title Slide	2
1.1 Module 12: Non-Exchange Entity Agreement & Next Steps.....	2
2. Next Steps.....	3
2.1 Next Steps.....	3
2.2 Next Steps.....	3
2.3 Next Steps.....	4
3. Account Reminders	4
3.1 Account Reminders.....	4
3.2 Confirm Names.....	5
3.3 Confirm Info.....	5
4. Pennie Logo Training & Non-Exchange Entity Agreement.....	6
4.1 Pennie Logo Training & Non-Exchange Entity Agreement.....	6
4.2 Using Pennie Logos.....	6
4.3 Pennie Logo Variations	7
4.4 Certified Assister Logo	7
4.5 Pennie Non-Exchange Entity Agreement.....	8
4.6 Pennie Non-Exchange Entity Agreement.....	8
4.7 Final Notes.....	9
5. Final Slide	9
5.1 Untitled Slide	9

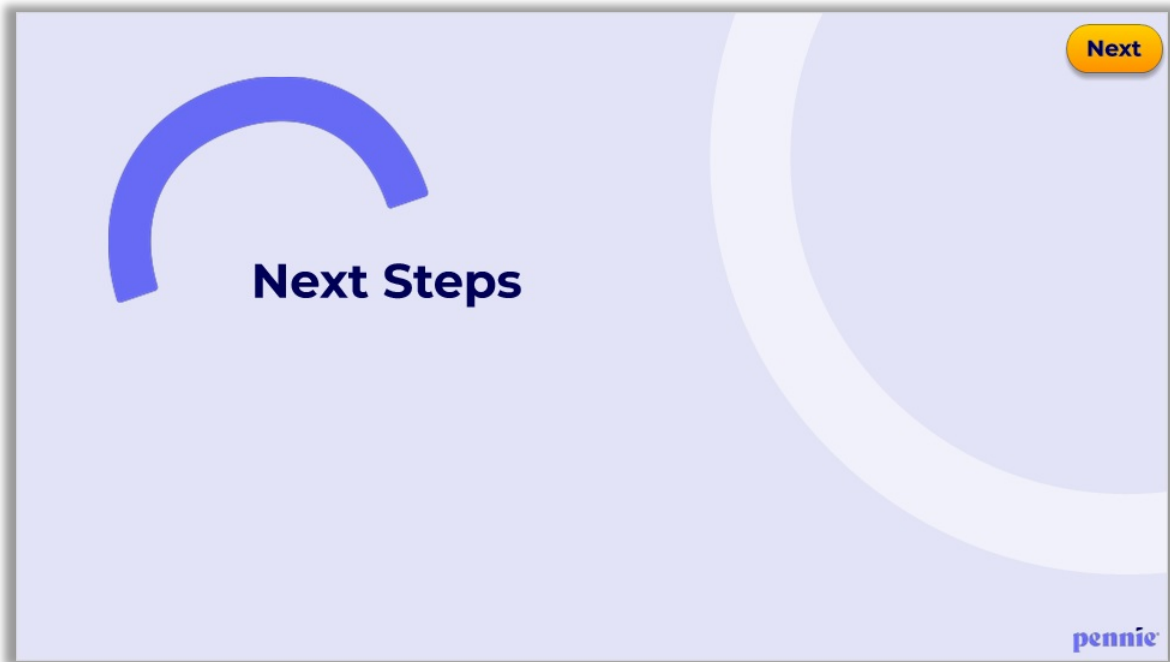
1. Title Slide

1.1 Module 12: Non-Exchange Entity Agreement & Next Steps



2. Next Steps

2.1 Next Steps



2.2 Next Steps

A presentation slide with a light blue background. At the top, there is a purple header bar with the text "Next Steps" in white. To the right of the header bar are two yellow buttons: "Back" and "Next". The main content area contains three paragraphs of text. At the bottom, there is a yellow callout box with black text. In the bottom right corner, the "pennie" logo is visible in a small, dark blue font.

Next Steps

In this final module of the Plan Year 2027 Certification Training, we will first review a few reminders regarding your TrainPA and Pennie accounts to ensure successful certification in our systems.

In the next section, you will review the Pennie Non-Exchange Entity Agreement. On the second-to-last slide of that section, you will be prompted to click on a link which will direct you to Pennie's website where you can review the Agreement in its entirety.

At the conclusion of this module, you will be prompted to first take the Final Exam, and then to provide your attestation to acknowledge, adhere to, and be bound by the Non-Exchange Entity Agreement.

You must score an 80% or better on the Final Exam to pass, and you must answer affirmatively to the Agreement attestation to be certified

2.3 Next Steps

Next Steps

BackNext

After passing the Final Exam and attesting to the Agreement, the status of your training should show as **Passed**. At this point, your registration will be sent to Pennie for approval. Approvals will be processed weekly at a minimum. Once approved, your status will have a **green checkmark** and the word **Verified** next to it. Your certificate will also be available to download for your records:

Pennie PY27 Assister Certification Training

Back

You have reached the maximum number of registrations allowed for this course.



Passed

Blended Learning Series

Published date Aug 17, 2026 11:59 PM EDT

Welcome to Pennie's annual Certification Training. This training course will prepare you to be an effective Pennie-certified Assister or Broker on the Pennie platform. The modules are to be taken in order and each one must be completed before you begin the next one. After all modules have been completed, there is a final exam. A score of 80% or better is required to pass the exam and complete the training course.

For more information, including links to each of the training modules and links to the resources covered in the modules, click on the links below.

Show more

Pennie PY27 Assister Certification Training

BackHistoryCertificate

You have reached the maximum number of registrations allowed for this course.



Passed ✓ Verified

Blended Learning Series

ID 1139142 Skill level: Introductory 3h

Welcome to Pennie's annual Certification Training. This training course will prepare you to be an effective Pennie-certified Assister or Broker on the Pennie platform. The modules are to be taken in order and each one must be completed before you begin the next one. After all modules have been completed, there is a final exam. A score of 80% or better is required to pass the exam and complete the training course.

For more information, including links to each of the training modules and links to the resources covered in the modules, click on the links below.

Show more



3. Account Reminders

3.1 Account Reminders

BackNext



Account Reminders



3.2 Confirm Names

Confirm NamesBackNext

Reminder: It is critical that you ensure the information entered on your TrainPA and Pennie accounts mirror your PA Insurance Department (PID) License or registration **exactly**.

Your Pennie account only has fields for:

- First Name
- Last Name

Do not add any of the following to the First Name or Last Name fields on your Pennie or TrainPA Accounts:

- Middle Name
- Prefix or Suffix
- Certifications, degrees, designations, or any other text

pennie

3.3 Confirm Info

Confirm InfoBackNext

PID License Search

Licensee Search

License Number:

First Name:

Middle Name:

Last Name:

Pennie Account

Assister Information

First name *

Last name *

Available for remote assistance ☐ Yes ☒ No

Role ☒ Entity Manager ☐ Assister

Email *

TrainPA Account

Your Profile

Manage Profile

Account

Account *

Contact

Address

Organization

Professional License Number

Professional Role

Work Settings

CPE Information

Account

Email *

First name *

Middle name

Last name *

pennie

4. Pennie Logo Training & Non-Exchange Entity Agreement

4.1 Pennie Logo Training & Non-Exchange Entity Agreement



4.2 Using Pennie Logos

Using Pennie Logos

All Pennie logos must be requested and approved through Pennie and provided from a Pennie source.

- To request the Pennie logo, visit: [External Affairs Support Requests | Pennie.com](#)

The standard Pennie logos, marks, monograms, and slogans cannot be re-created or edited outside of the Pennie organization.

All logos must include the registered symbol: ®

- Some Pennie marks recently became registered - old logos include the trademark symbol and will need to be updated with the registered symbol
- When writing the Pennie name in materials or publications, the first mention of Pennie must have the registered symbol

All Pennie logo or brand use needs to follow the Pennie style guide which can be found on the Pennie website at: [Newsroom | Pennie.com](#).

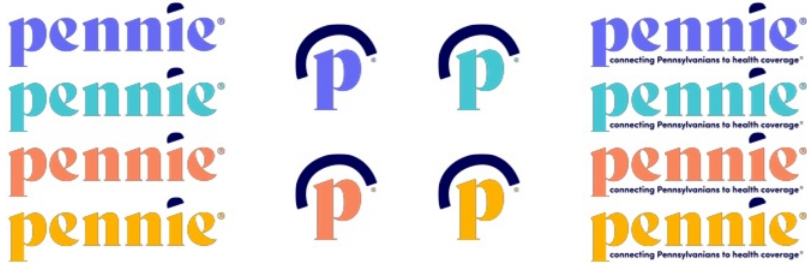
pennie

4.3 Pennie Logo Variations

Pennie Logo VariationsBackNext

Pennie logos come in different shapes, sizes and colors. Each version below is an approved Pennie logo and follows the Pennie branding style/color palette.

If you require an item to include any of the logos below, it must be requested from Pennie, and all materials must be approved before publication.



pennie

4.4 Certified Assister Logo

Certified Assister LogoBackNext

Pennie-certified Assister logos are available for all Pennie assisters who have completed the current Assister Certification training for the upcoming plan year.

You can request the logo at: [External Affairs Support Requests | Pennie.com](#)

The Pennie-certified Assister logo can be used in your external-facing materials (email signature, website, business cards, marketing materials, etc.) to show Individuals you are a certified assister through the marketplace.



pennie

4.5 Pennie Non-Exchange Entity Agreement

Pennie Non-Exchange Entity AgreementBackNext

Before beginning this training, you should have been provided with the Pennsylvania Health Insurance Exchange Authority (PHIEA; "Pennie") Non-Exchange Entity Agreement.

This agreement establishes a contractual relationship with PHIEA and details the requirements, responsibilities, and terms you have agreed to as a Pennie Entity and/or an Assister, including:

- Obligations and Duties of the Enrollment Assister
- Duties of the Enrollment Assister Relative to PII
- Proper Uses of Exchange Platform
- Security and Privacy Standards, and
- Conflict-of-Interest Standards
- Termination; Remedies; Indemnification
- Permitted Uses and Disclosure of PII by the Enrollment Assister

As a Pennie-certified Assister, you must adhere to the terms and obligations of this agreement at all times. Failure to do so could result in termination of your Pennie certification.

pennie

4.6 Pennie Non-Exchange Entity Agreement

Pennie Non-Exchange Entity AgreementBackNext

Below is a link to the Pennie Non-Exchange Entity Agreement. It can also be found on the *Resources* page at Pennie.com. To proceed to the next slide, you must first click on the link below to review the agreement.

Your acknowledgement and agreement to adhere to the Non-Exchange Entity Agreement will be captured after you have passed the Final Exam.

Pennie Non-Exchange Entity Agreement

pennie

4.7 Final Notes

Final Notes

BackNext

If you haven't already done so, create your Pennie entity manager account or ask your entity manager to initiate the creation of your assister account.

Please allow **10-14 business days** to:

- Verify the completion of your training and issue your certificate through TrainPA
- Validate that the information entered on your TrainPA and Pennie accounts match our database of information from the PA Insurance Department
- Update the *Certification Status* of your Pennie account from **Pending** to **Certified**, and/or your *Certification End Date* to **12/31/2027**

Please do not email assisters@Pennie.com to let us know you have completed the training, or to send a copy of your certificate. Our reporting identifies who has newly completed the training and is constantly updated; the Certificate is for your records.

If you have any questions, please call the Pennie Assister/Broker line at 844-844-4440.

pennie

5. Final Slide

5.1 Untitled Slide

BackExit

pennie

ADDRESS

P.O. Box 11873
Harrisburg, PA 17108-1873

PHONE

+1 844-844-8040

WEB

Pennie.com