

PY27 Cert Training Module 2B – Agents

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1. Title Slide

1.1 Module 2B: Broker Portal Training

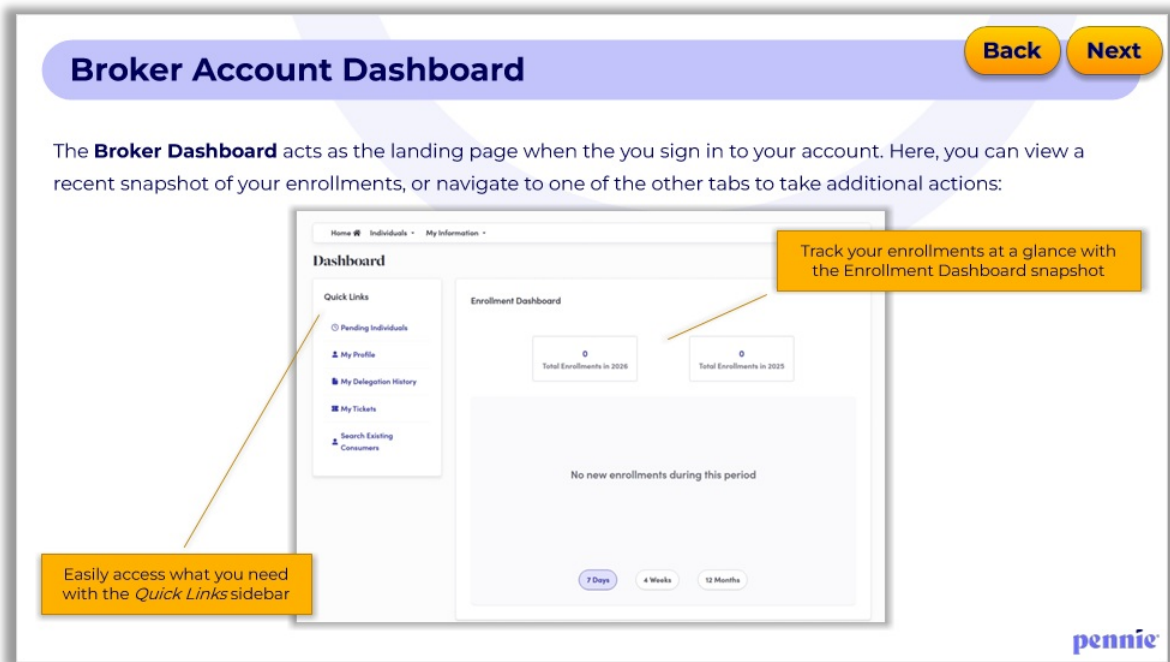


2. Broker Account Functionality

2.1 Broker Account Functionality



2.2 Broker Account Dashboard

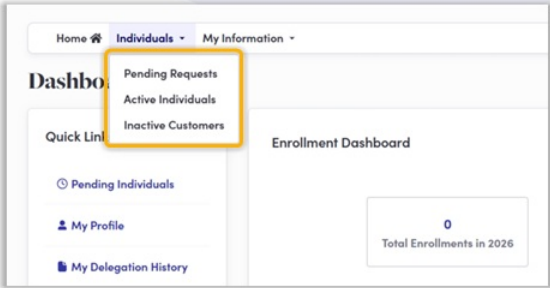


2.3 Individuals Tab

BackNext

Individuals Tab

Under the **Individuals** tab, you can respond to pending new business requests, access and manage your active clients, export your Book of Business, and review inactive customers if necessary:



Enrollment Dashboard

Total Enrollments in 2026: 0

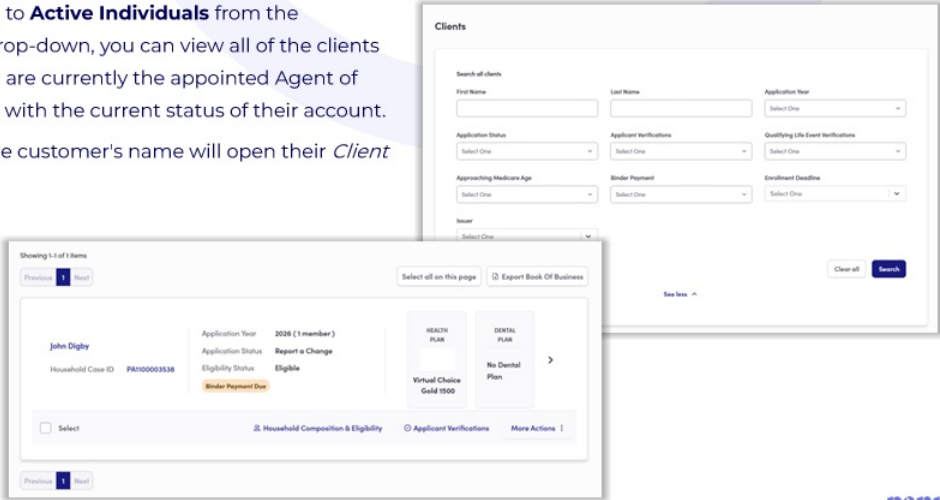
pennie

2.4 Active Individuals

BackNext

Active Individuals

By navigating to **Active Individuals** from the **Individuals** drop-down, you can view all of the clients for whom you are currently the appointed Agent of Record, along with the current status of their account. Clicking on the customer's name will open their *Client Details* page.



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2.5 Active Individuals: Client Details

Active Individuals: Client Details

BackNext

The **Client Details** page shows summaries of:

- The household account
- Open application verifications/DMIs
- The household members and their eligibility
- The active policy(ies)

Coverage Details 2026 2025

Health Plan	Plan highlights	More details
Virtual Choice Gold 1500	Net Premium: \$450.00/month Subsidies: Primary care visit: No Charge Generic drugs: \$0.00 Deductible: \$0.00 OOP Max: \$0.00	Policy ID: 3145 Coverage period: 06/01/2026 - 12/31/2026 Monthly plan premium: \$450.00 Status: Pending Customer Service: Web link Web link

Account Note

No Account Note

Add Account Note

Client details

John Digby
Household Case ID: PA100003538
Date of Birth: 01/01/1985

Current Application Year: 2026 (1 member)
Current Application Status: Report a Change
Current Eligibility Status: Eligible
Binder Payment Due

Email: digby@gmail.com
Phone: 412-555-8888
Member Address: 123 Main St, Pittsburgh, PA, 15216

Applicant Verifications

All applicant verifications completed

Household Details 2026 2025

Summary

Exchange plan eligibility	Eligible
APIC for Household	-
Cost sharing reduction	-
PA Health Plan Settings	-

Household members: +1 total

John Digby - Self	Member eligibility
DOB: 01/01/1985	Eligible: Yes
Gender: Male	Eligible: Yes
SSN: ***-**-4567	Eligible: Yes
Address: 123 Main St, Pittsburgh, PA, 15216	Eligible: Yes
VE covered: Yes	Eligible: Yes
Seeking coverage? No	Eligible: Yes

Household info

Required verifications/DMIs

Household members & Eligibility Summary

Policy details

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2.6 Your Book of Business

Your Book of Business

BackNext

On the **Active Individuals** page, you have ability to export your **Book of Business** as an .xls or .csv file. The report contains customer and plan information, along with the status of your customers' applications.

Showing 1-1 of 1 items

Previous1Next

Select all on this page

Export Book Of Business

John Digby	Application Year: 2026 (1 member)	HEALTH PLAN	DENTAL PLAN
Household Case ID: PA100003538	Application Status: Report a Change	Virtual Choice Gold 1500	No Dental Plan
	Eligibility Status: Eligible		
	Binder Payment Due		

Select

Household Composition & Eligibility

Applicant Verifications

More Actions

Previous1Next

Export data

Export currently selected clients (0)

Export all clients in search results (1)

Export entire Book of Business

Format

XLS (Microsoft Excel)

CSV

You are attempting to download customer information. You must agree that you will follow Pennie's privacy and security standards to continue.

I agree

Cancel

Export

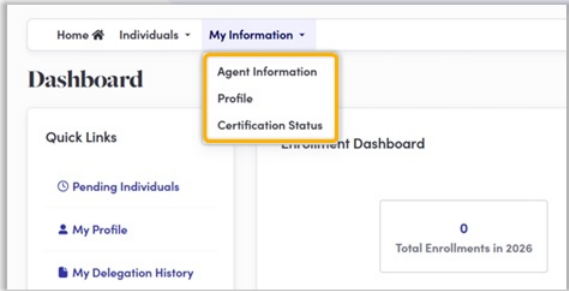
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2.7 My Information Tab

My Information Tab

BackNext

Under the **My Information** tab, you can view and/or update your contact information, how the information on your account appears to customers, and confirm your certification status:



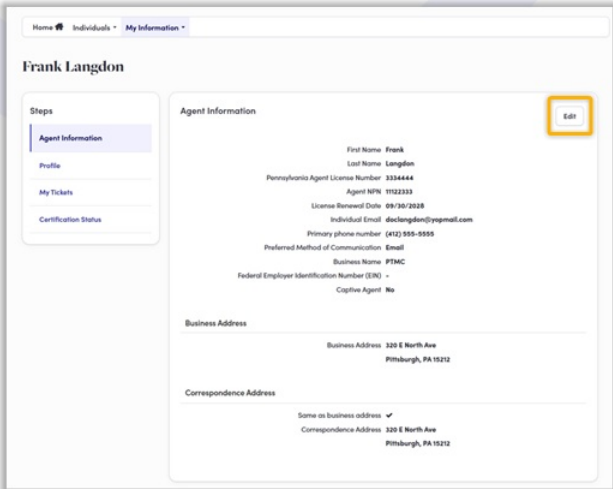
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2.8 Agent Information

Agent Information

BackNext

To view and/or update the information on your account, select **Agent Information**:



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2.9 My Profile

My ProfileBackNext

To view and/or update how the information on your account appears to customers when searching for a broker, click on **My Profile**:

Home

Individuals

My Information

Frank Langdon

Steps

Agent Information

Profile

My Tickets

Certification Status

Profile

Review and edit your public profile, which can be seen by Pennie users looking for Agents. The more accurate the information you provide, the more likely it is that potential customers will contact you.



Frank Langdon

320 E North Ave
Pittsburgh, PA 15212

Phone number (412) 555-5555

Your Public Email doclangdon@yahoo.com

Business Contact Phone Number (412) 555-5555

Product Expertise Health, Dental, Medicaid, CHIP

Allow consumers to search Yes

Available for remote assistance Yes

State License Number Yes

Edit



2.10 My Tickets

My TicketsBackNext

You are able to access your **My Tickets** page either from the *My Profile* page, or by clicking on **My Tickets** under the *Quick Links* on the *Dashboard*.

Quick Links

Pending Individuals

My Profile

My Delegation History

My Tickets

Ticket History

Submit New Ticket

Ticket Id	Subject	Individual	Status	Created Date	Close Date
TIC-1035109	Verify Change to Employer Plan, with Gain in Eligibility for Financial Help		Resolved	08/01/2025	08/15/2025
TIC-1032106	Verify Citizenship		Resolved	07/25/2025	07/25/2025
TIC-1031922	Verify Change to Employer Plan, with Gain in Eligibility for Financial Help		Resolved	07/24/2025	07/31/2025



2.11 Certification Status

Certification Status

Back Next

To confirm the certification status of your account, select **Certification Status**:

After completing this training, please allow up to 10-14 business days for your **Certification Renewal Date** to be updated on your account.

Pennie performs checks on the information entered against trusted sources to verify its accuracy. **If any piece of information does not match your PID-issued license *exactly*, we will be unable to certify your account.**

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Steps

- Agent Information
- Profile
- My Tickets
- Certification Status

Certification Status

Agent Number 2000001224
Application Submission Date 08-12-2026
Certification Status **Certified**
Certification Number 5000001160
Certification Date 08-12-2026
Renewal Date 12-31-2027

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3. Search for Existing/Add New Consumers

3.1 Search for Existing/Add New Consumers

Back Next

Search for Existing/Add New Consumers

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3.2 Search for Existing/Add New Consumers

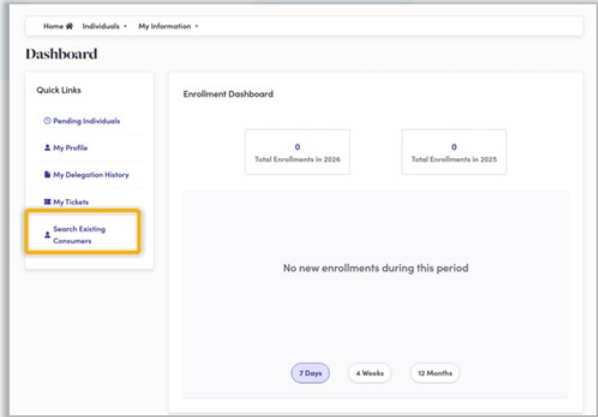
Search for Existing/Add New Consumers

BackNext

To add a new customer, click on the **Search Existing Consumers** link under the *Quick Links* section of the *Dashboard*.

This feature still allows brokers to create a new household on behalf of a customer if one doesn't currently exist, but requires you to first search the system for an existing household record prior to creating a new one. This helps prevent creation of duplicate households.

If no customer record exists, you will be prompted to create a new record and appoint yourself as their Agent of Record at the same time.



The screenshot shows the Pennie Dashboard. On the left, under 'Quick Links', the 'Search Existing Consumers' link is highlighted with a yellow box. The main area shows 'Enrollment Dashboard' with two boxes for 'Total Enrollments in 2020' (both showing 0) and a message 'No new enrollments during this period'. At the bottom, there are filters for '7 Days', '4 Weeks', and '12 Months'.

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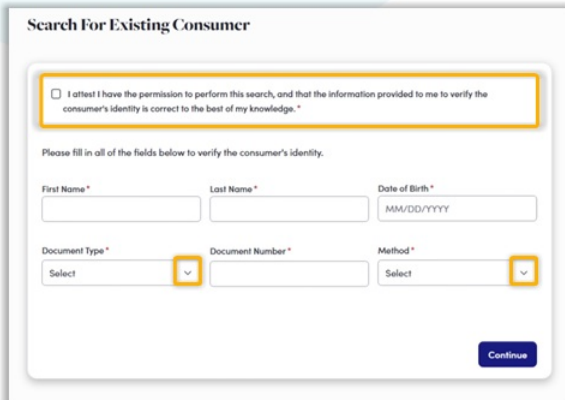
3.3 Search for Existing/Add New Consumers

Search for Existing/Add New Consumers

BackNext

On the first page of the search tool, you will enter the customer's name and date of birth. You will then select the corresponding type of documentation which you have been provided by the customer allowing you to verify their identity:

After the document number is added, specify if the customer provided the documentation in person or over the phone:



The screenshot shows the 'Search For Existing Consumer' form. It starts with a checkbox: 'I attest I have the permission to perform this search, and that the information provided to me to verify the consumer's identity is correct to the best of my knowledge.' Below this, it says 'Please fill in all of the fields below to verify the consumer's identity.' The form has three rows of fields: 'First Name *', 'Last Name *', and 'Date of Birth *' (with a MM/DD/YYYY format hint); 'Document Type *' (a dropdown menu), 'Document Number *', and 'Method *' (a dropdown menu). A 'Continue' button is at the bottom right.

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3.4 Search for Existing/Add New Consumers

Back

Next

Search for Existing/Add New Consumers

On the next page, you will be asked to enter the customer's Social Security Number if it wasn't provided on the first page (the DOB will pre-populate regardless):

Fetch Existing Consumer

Search by SSN

Social Security Number *

***-**-6789

Date of Birth *

01/01/1986

Search

Note: The search tool will only work for customers with an SSN. For those without an SSN, you must call Pennie Customer Service with the customer on the line.

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3.5 Search for Existing/Add New Consumers

Back

Next

Search for Existing/Add New Consumers

If the customer record is found, you can select the account, then trigger a **One-time Passcode (OTP)** that is immediately sent to the customer:

If no customer is found, you will be prompted to begin a new application:

Fetch Existing Consumer

Search by SSN

Social Security Number *

***-**-6789

Date of Birth *

01/01/1986

Search

John Digby

DOB

01/01/1986

Address

123 Main St, Pittsburgh, PA 15215

Phone

4127799999

Email

digby@pypmail.com

SSN

XXX-XX-6789

Cancel

Send Passcode

No match found

Based on the details you provided, we were unable to make a match to our database. If you would like to start a new application, please select the Start A New Application button to begin the process. If you would like to try again, please select the Cancel button to re-enter details.

Cancel

Start new application

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3.6 Search for Existing/Add New Consumers

BackNext

Search for Existing/Add New Consumers

Once the **One-time Passcode (OTP)** is triggered, the code is immediately sent to the customer. The customer will need to provide you with the passcode before you are able to appoint yourself as their Agent of Record:

John Digby

DOB	01/01/1986
Address	123 Main St, Pittsburgh, PA 15215
Phone	4121119999
Email	digby@yopmail.com
SSN	XXX-XX-6789

Cancel

Send Passcode

A passcode will be sent to the customer. Passcode verification is required before you can add the customer to your book of business.

3.7 Search for Existing/Add New Consumers

BackNext

Search for Existing/Add New Consumers

Depending on the customer's communication preferences and how they have indicated they would like receive important alerts, the system will:

- Send the OTP to the cell phone number associated with their account via text message
- Call the phone number associated with their account to verify the OTP
- Send the OTP to the email address associated with their account

Verify email

A passcode has been sent to digby@yopmail.com. Enter the passcode into field below to update the email address.

Enter passcode

Submit

Didn't receive your verification passcode? [Resend](#)

Cancel

Verify Phone Number

A passcode has been sent to (412) 111-9999. Enter the passcode into field below to update the phone number.

Enter passcode

Submit

Didn't receive your verification passcode?
[Resend by text message](#)
[Resend by automated phone call](#)

Cancel

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3.8 Search for Existing/Add New Consumers

Search for Existing/Add New Consumers

BackNext

After successfully verifying the OTP, simply confirm that you would like to add the customer to your Book of Business:

Are you sure?

Are you sure you want to become the Agent of Record for John Digby

If you click "Yes", John Digby will be added to your Book of Business. You can then access the consumer's applications and other details to help them with enrollment.

CancelYes

Success

John Digby has been successfully added to your Book of Business.

Close

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3.9 Pending Delegation Requests

Pending Delegation Requests

BackNext

Customers can initiate delegation requests as well. This can be done through the Customer "Get Free Help" Search. By navigating to the **Pending Delegation Request** page under the **Individuals** tab, you can view delegation requests you've received and are awaiting your acceptance (or denial):

Pending Individuals 1 Customer

Refine Results By (Reset all)

First Name

Last Name

Name	Family Size	Request Sent	
John Digby	1	08/06/2026	AcceptDecline

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3.10 Avoiding Duplicate Enrollments

Avoiding Duplicate Enrollments

BackNext

Most customers should only have one household account in the Pennie system.

When a customer has more than one household record, it can cause unexpected outcomes resulting in confusion, poor customer service, customer frustration, and delays.

Most duplicate household accounts are created when assisters or brokers add a new household for a customer when the client already had an existing household on Pennie.

When working with a new client, be sure to ask them if they:

- Ever had – or applied for – coverage through Pennie
- Had coverage through HealthCare.gov in 2020
 - If so, they likely already have an existing household account on Pennie

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4. Account & Book of Business Transfers

4.1 Account & Book of Business Transfers



Account & Book of Business Transfers

BackNext

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4.2 Overview

Overview

BackNext

It is common for Pennie-certified Brokers to change agencies. This can be for a number of reasons, some of which are listed below:

- Going from one brokerage to another
- Going from a brokerage to self-employment (or vice versa)
- Going from an insurer to a brokerage or self-employment (or vice versa)

When changing agencies, **you must inform Pennie as soon as possible.**



Brokers are not able to transfer their own account to another agency – it must be done by a **Pennie administrator.** Simply changing the name of the agency in the **Business Name** field of your account **does not** transfer your account to a new agency.



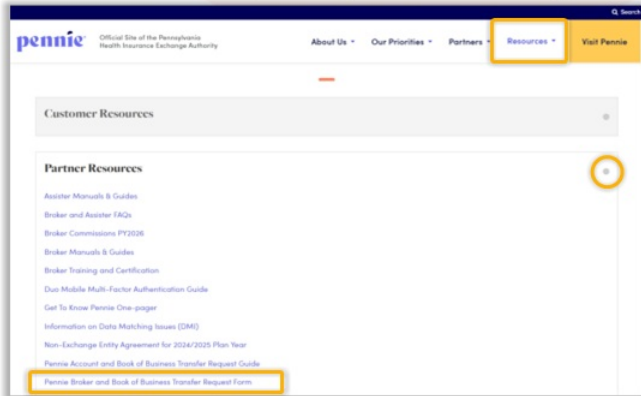
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4.3 Changing Agencies: Existing Accounts

Changing Agencies: Existing Accounts

BackNext

If you already have a broker account and will be moving to a new agency, **you will need to request an account transfer by completing and attaching the Pennie Broker and Book of Business Transfer Request Form** to a ticket submitted from your current account, or by emailing the form to brokers@pennie.com.



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4.4 Broker and Book of Business Transfer Request Form

Broker and Book of Business Transfer Request Form

BackNext

One or both check boxes *must* be marked:

- If the broker account along with their Book is being transferred to your agency, check *both* boxes
- If only the broker account is being transferred (i.e., their Book remains property of their current agency), check the left box *only*
- If only the broker's Book is being transferred (i.e., broker's Book was purchased, broker is retiring, etc.), check the right box *only*

Enter the broker's information and signature here

Enter the broker's current agency information here. Must be signed by an authorized rep from the agency.

Note: If the current agency does not sign off on the release of customers to the new agency, the transfer will not be processed.

Enter your agency's information and sign here

Check the appropriate boxes (select both if applicable):

☐ Check if transferring Broker to a New Pennie Agency ☐ Check if transferring Customers to New Pennie Agency

Section 1: Broker Information (required):

First Name: _____ Contact Email: _____
Last Name: _____ Contact Telephone: _____
License No.: _____ NPI: _____
By signing, you are requesting transfer from the Current Pennie Agency to the New Pennie Agency. Additionally, you are electing under penalty of perjury, as governed by 42 Pa.C.S. §§ 6201-6209 (relating to witness examinations), that you are in compliance with all federal and state laws and regulations applicable to this action.
Broker Signature: X _____

Section 2: Current Pennie Agency (required):

Note: this section to be completed by an authorized representative of the Broker's Current Pennie Agency.

Agency Name: _____ Agency FEIN: _____
Agency Contact: _____ Contact Telephone: _____
Contact Email: _____
By signing your Agency, you are electing under penalty of perjury, as governed by 42 Pa.C.S. §§ 6201-6209 (relating to witness examinations), that you are in compliance with all federal and state laws and regulations applicable to this action.
Authorized Representative's Signature: X _____

Section 3: New Pennie Agency (required):

Note: this section to be completed by an authorized representative of the Broker's New Pennie Agency.

Agency Name: _____ Agency FEIN: _____
Agency Contact: _____ Contact Telephone: _____
Contact Email: _____
By signing your Agency, you are electing under penalty of perjury, as governed by 42 Pa.C.S. §§ 6201-6209 (relating to witness examinations), that you are in compliance with all federal and state laws and regulations applicable to this action.
Authorized Representative's Signature: X _____

4.5 Starting a New Agency

Starting a New Agency

BackNext

If you already have a broker account and will be creating your own agency and/or going self-employed, you will need to create a new agency and agency manager account by following the path below:

Brokers | Pennie.com

Get Certified!

2027 Broker Certification Training is coming soon!
To learn how to become a licensed broker with Pennsylvania, please visit:
<https://www.insurance.gov/licenses/Pages/default.aspx>

Get Help

Create An Account
Agent (Broker) Account Claiming Guide
Agency & Agency Manager Account Creation Guide
TrainPA Account Creation & Profile Update Guide

Do you already have a Pennie account? *

No

I need to create an account and: *

I am an Agency Manager or Principal

4.6 Starting a New Agency

Starting a New Agency

BackNext

For simplicity, Pennie combines the creation of the agency account with the creation of the agency manager account.

After completing your new profile, a system notification will inform you of the Pennie review and approval process.

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.



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 *

Security Answer *

Set Password

Password *

Confirm Password *

☐ I have read and agree to the Privacy Policy

Cancel Submit





4.7 Important Reminders

Important Reminders

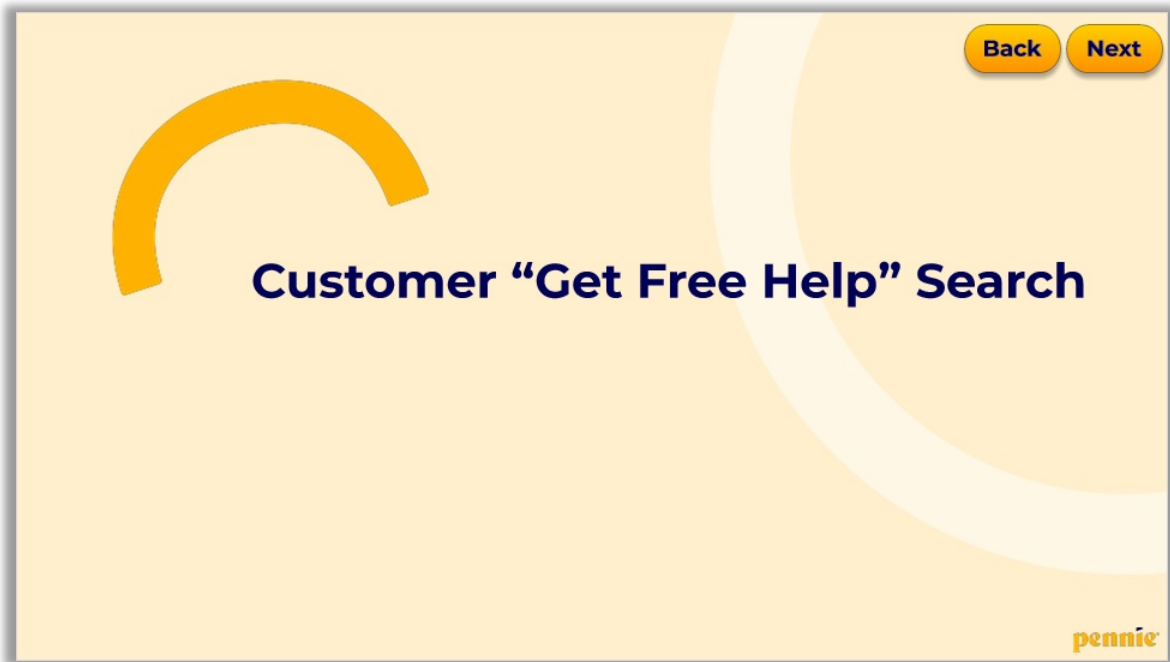
BackNext

-  If you are the designated agency manager for your current agency and you are moving to another agency, **you must designate another agent as the new agency manager prior to submitting the account transfer request.**
-  If you are self-employed or are the only active agent of the agency, **Pennie will decertify the current agency** upon completion of the transfer.
-  Agency managers: if an agent is leaving your agency and they have active designations that will remain property of your agency, **it is your responsibility to transfer those delegations to yourself or another agent prior to the agent account transfer.** If not, those delegations will be lost.

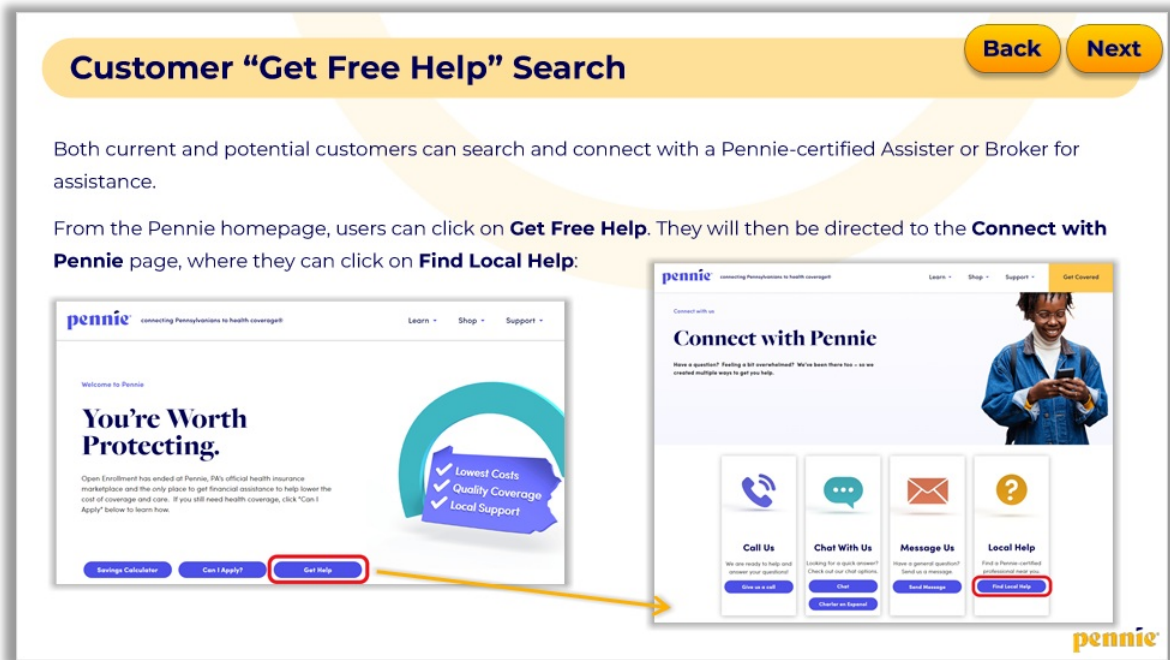


5. Customer “Get Free Help” Search

5.1 Customer “Get Free Help” Search



5.2 Customer “Get Free Help” Search



5.3 Customer “Get Free Help” Search

Customer “Get Free Help” Search

BackNext

Users will then be prompted to choose whether to search for an assister or broker:

Note: The search results are not combined, so the assister search will only return assisters, and vice versa.

Both search tools have a **Search by Location** option; the Assister search also includes an **Organization Name** search, while the Broker search includes a **Search by Name**:

The diagram illustrates the search process. It begins with a choice between 'Find a Pennie-Certified Assister' and 'Find a Pennie-Certified Broker'. The Assister search includes 'Search by Organization Name' and 'Search by Location'. The Broker search includes 'Search by Name' and 'Search by Location'. Both searches lead to a 'Both searches' box, which then leads to a 'Broker search' box.

Assister search (Search by Organization Name):

Organization Name:

Search

Both searches (Search by Location):

Zip code:

Distance: miles

Languages:

Search

Broker search (Search by Name):

First Name:

Last Name:

Agency Name:

Search

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5.4 Customer “Get Free Help” Search

Customer “Get Free Help” Search

BackNext

To the right is an example search result – note how your information is displayed to customers:

Below is the expanded information for the selected assister or broker:

The screenshot shows the 'Agent Selection' page. It includes a map, contact information, and a 'SELECT AGENT' button. The search results table is as follows:

Name	Contact Info	Distance	Product Expertise	Languages
Jake Broker	Jake's Agency LLP 914 N 2nd St Harrisburg, PA 17102 814-460-1286 jbroke@yopmail.com	0.0m		
Jake Agencymanager	Jake's Agency LLP 914 N 2nd St Harrisburg, PA 17102 814-460-1286 jakeagencymanager@yopmail.com	0.0m		
Test Broker	Jake's Agency LLP 914 N 2nd St Harrisburg, PA 17102 814-460-1286	0.0m		
sample agent	SampleAgent 101 Main St Harrisburg, PA 17101 610-658-4578	1.0m	Health, Dental, Vision, Life, Medicare, Workers Compensation,	

Agent Selection

Selecting an agent as your representative allows them to access your account, see your information, and make changes on your behalf.

Back Search Again **SELECT AGENT**

Jake Broker

914 N 2nd St, Harrisburg, PA 17102
814-460-1286
jbroke@yopmail.com

Product Expertise
Languages Spoken
State License Number
Clients Served

1234567890
Individuals/
Families

[-] What should I know before I designate an Agent?

Once a customer chooses the assister or broker they would like to work with, they can click on the **Select Agent** button to send a connection request.

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5.5 Customer “Get Free Help” Search

Customer “Get Free Help” SearchBackNext

The final step in the process is for the customer to agree to appoint the agent as the Authorized Contact or Agent of Record on their account:

Agent to be Designated: Jake Broker

☒ I authorize this Agent or Broker permission to access, enter and update information in my online application. I, further grant permission to the Agent or Broker to submit my completed application, including signing the application on my behalf.

☒ I understand that I can revoke the authorization for this Agent or Broker at any time through my account dashboard or by contacting Pennie Customer Service at 844-844-8040 or TTY 711.

☒ I grant permission to the Agent or Broker to enter payment information on my behalf. I understand that the form of payment I provide will be charged the quoted premium.

Signature

Applicant Name **Testuser Two**

Applicant E-Signature
Type your full name here as your electronic signature.

Today's Date

Confirm

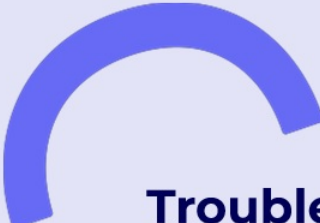
All customers are required to e-Sign, granting you permission to work within their account and on their behalf

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6. Troubleshooting Account Issues

6.1 Troubleshooting Account Issues

BackNext



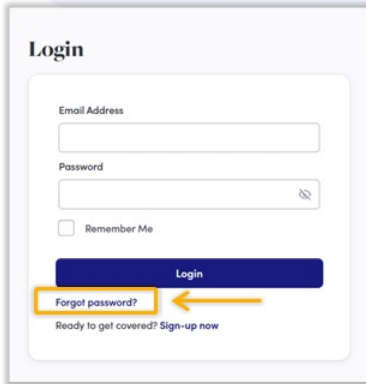
Troubleshooting Account Issues

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6.2 Resetting Passwords

Resetting PasswordsBackNext

To change your login password – or if you have forgotten it – simply click on the **Forgot password?** link under the **Login** button when trying to sign in to your account:



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6.3 Multi-factor Authentication (MFA)

Multi-factor Authentication (MFA)BackNext

Multi-factor authentication (MFA) is a way to further secure access to sensitive data by requiring an additional verification method to access an account. Even if a user's password is compromised, the bad actor will still be unable to access the account without access to the additional verification method.

In mid-2026, Pennie transitioned from Duo to Keycloak as the MFA provider. Keycloak utilizes time-out one-time passcode (TOTP) for verification. TOTP is an MFA method where a registered app or device generates a 6-digit code that changes every 30 seconds. After entering their username and password, the user must enter the current code to complete login.

Users may use any standard TOTP-compatible application, including:

- Google Authenticator
- Microsoft Authenticator
- Duo (in OTP mode)
- FreeOTP
- Apple Password Manager
- Other standard TOTP-compatible apps
- Browser-based authenticator extensions may also work, such as Authenticator.cc for Chrome, Edge, and Firefox

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6.4 MFA First-time Setup: Mobile App Option

MFA First-time Setup: Mobile App Option

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1. To set up your new MFA method, log in with your username and password as you would normally:

Login

Email Address

Password

☐ Remember Me

Login

[Forgot password?](#)

You will be prompted to set up multi-factor authentication. Select the **Use an authenticator mobile app** option.

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6.5 MFA First-time Setup: Mobile App Option

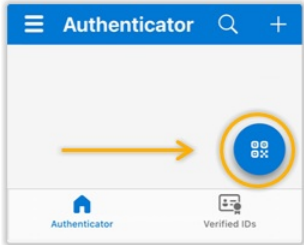
MFA First-time Setup: Mobile App Option

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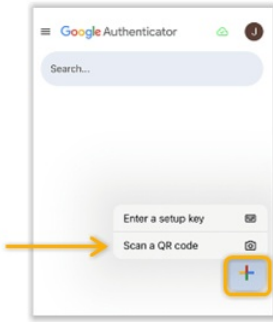
2. If you don't have one already, you will need to download a mobile authentication program from your phone's app store.

3. Once downloaded, open the app. *In the app*, select **Scan QR Code**

- Depending on the app, this may be a button with a QR code icon, an option titled "Add Account," or something similar
- This should automatically open your phone's camera



(Microsoft Authenticator)



(Google Authenticator)

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6.6 MFA First-time Setup: Mobile App Option

MFA First-time Setup: Mobile App Option

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4. Once the camera has opened, scan the QR code *on the computer screen* with your camera

- A new account will be added to your authenticator app and immediately begin providing 6-digit codes

5. Enter the code shown into the **One-time code field** on the setup screen, then click **Submit**

Note: There is a timeout of 5 minutes once you get to Step 3. If you don't complete Step 5 in that time, you will be asked to login again.

Mobile authenticator setup

You need to set up Mobile Authenticator to activate your account.

- 1 Install one of the following applications on your mobile:
 - FreeOTP
 - Microsoft Authenticator
 - Google Authenticator
- 2 Open the application and scan the barcode:
[Unable to scan?](#)
- 3 Enter the one-time code provided by the application and click Submit to finish the setup. Provide a Device Name to help you manage your OTP devices.

One-time code *

Device Name

Submit

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6.7 MFA First-time Setup: Browser Extension Option

MFA First-time Setup: Browser Extension Option

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If you are unable to use a mobile phone for authentication, you can opt to use a web browser extension.

Login

Email Address

Password

☐ Remember Me

Login

[Forgot password?](#)

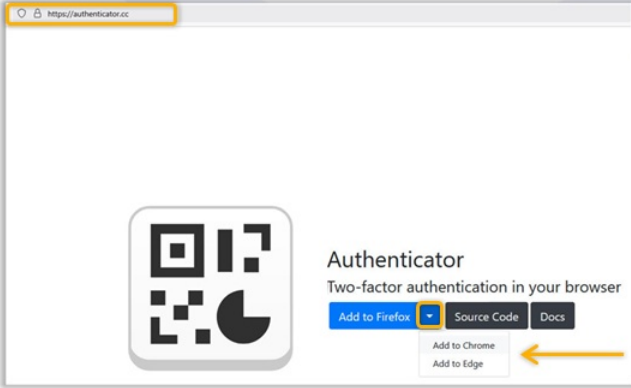
1. As with the mobile app option, log in with your username and password, then select the **Use an authenticator mobile app** option.

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6.8 MFA First-time Setup: Browser Extension Option

MFA First-time Setup: Browser Extension OptionBackNext

2. With the TOTP setup screen up, open a new browser tab and go to **authenticator.cc**



Select the option that corresponds with your browser

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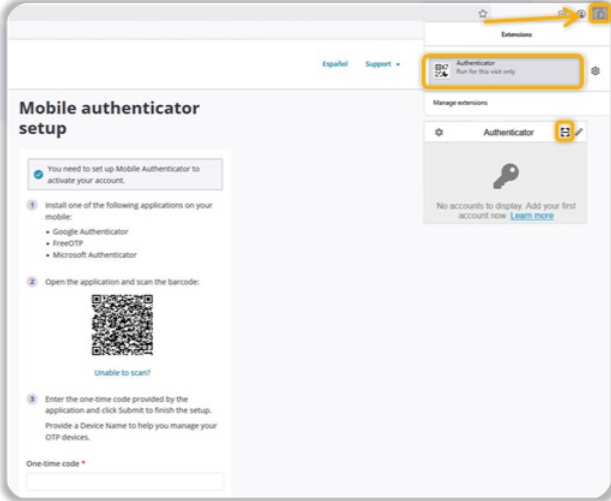
6.9 MFA First-time Setup: Browser Extension Option

MFA First-time Setup: Browser Extension OptionBackNext

3. Return to the **Mobile authenticator setup** tab

4. Open the newly-downloaded browser extension by clicking on the puzzle icon, then the QR scan icon

- This will activate the QR code scanning feature within your browser



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6.10 MFA First-time Setup: Browser Extension Option

MFA First-time Setup: Browser Extension Option

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5. From here, click and drag your mouse cursor over the entire QR code on the **Mobile authenticator setup** screen



Mobile authenticator setup

You need to set up Mobile Authenticator to activate your account.

1 Install one of the following applications on your mobile:

- Google Authenticator
- FreeOTP
- Microsoft Authenticator

2 Open the application and scan the barcode:

Unable to scan?

3 Enter the one-time code provided by the application and click Submit to finish the setup. Provide a Device Name to help you manage your OTP devices.

One-time code *

Device Name

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6.11 MFA First-time Setup: Browser Extension Option

MFA First-time Setup: Browser Extension Option

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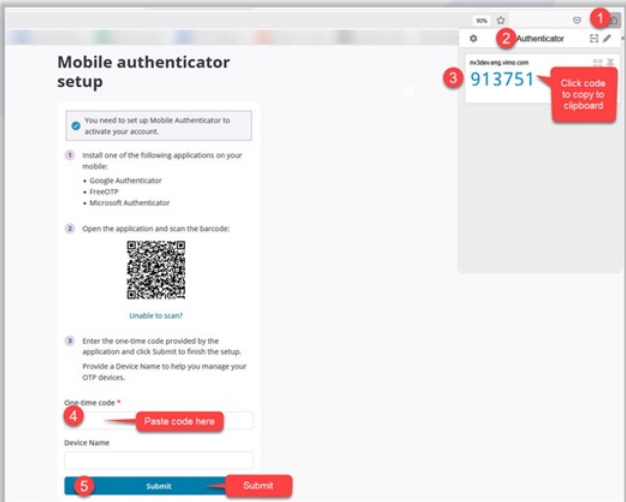
6. If scanned successfully, you'll see a confirmation screen that the username has been successfully added. Click "OK" to close window.

7. Reopen the browser extension by clicking on the puzzle icon. You should now see a 6-digit TOTP code.

- Click on the code to copy it to your clipboard.

8. Click on the **One-time code** box and paste the code.

9. Click **Submit**



Mobile authenticator setup

You need to set up Mobile Authenticator to activate your account.

1 Install one of the following applications on your mobile:

- Google Authenticator
- FreeOTP
- Microsoft Authenticator

2 Open the application and scan the barcode:

Unable to scan?

3 Enter the one-time code provided by the application and click Submit to finish the setup. Provide a Device Name to help you manage your OTP devices.

One-time code *

Paste code here

Device Name

Submit Submit

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6.12 Account Access Issues

Account Access Issues

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In the system, anytime a new account is created, a new user account is also generated. The "name" of the user account is the email address that the new account was created with.

If you change the email address on file for your Assister account, the email ("name") associated with your user account does *not* change automatically.

For example, if an Entity Manager creates a new Assister account on their behalf, but mistakenly enters their email address as "Jef@agencyname.com" instead of "Jeff@agencyname.com," the user account generated will use the first email of "Jef@agencyname.com." Even if the Assister corrects the address on their account after claiming it, the user account will retain the incorrect address.

This discrepancy between email addresses can lead to confusion between Assisters, Entity Managers, and Pennie Customer Service Representatives should either the assister or user account become locked, go dormant, or need a password update.

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6.13 Account Access Issues

Account Access Issues

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While Pennie Customer Service Representatives are trained to check the user account when encountering account access issues, it is good practice to **document the original email the account was created with**, as that should also be the email of the user account. Should you need to change the email on your assister account in the future, **please call the Pennie Customer Service Broker & Assister Line (844-844-4440) to ensure the user account email is also updated to match.**

This will help avoid access issues down the road, as account activation links and password reset emails are **sent to the user account email address, not the assister account address.**

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7. End Slide

7.1 Untitled Slide

