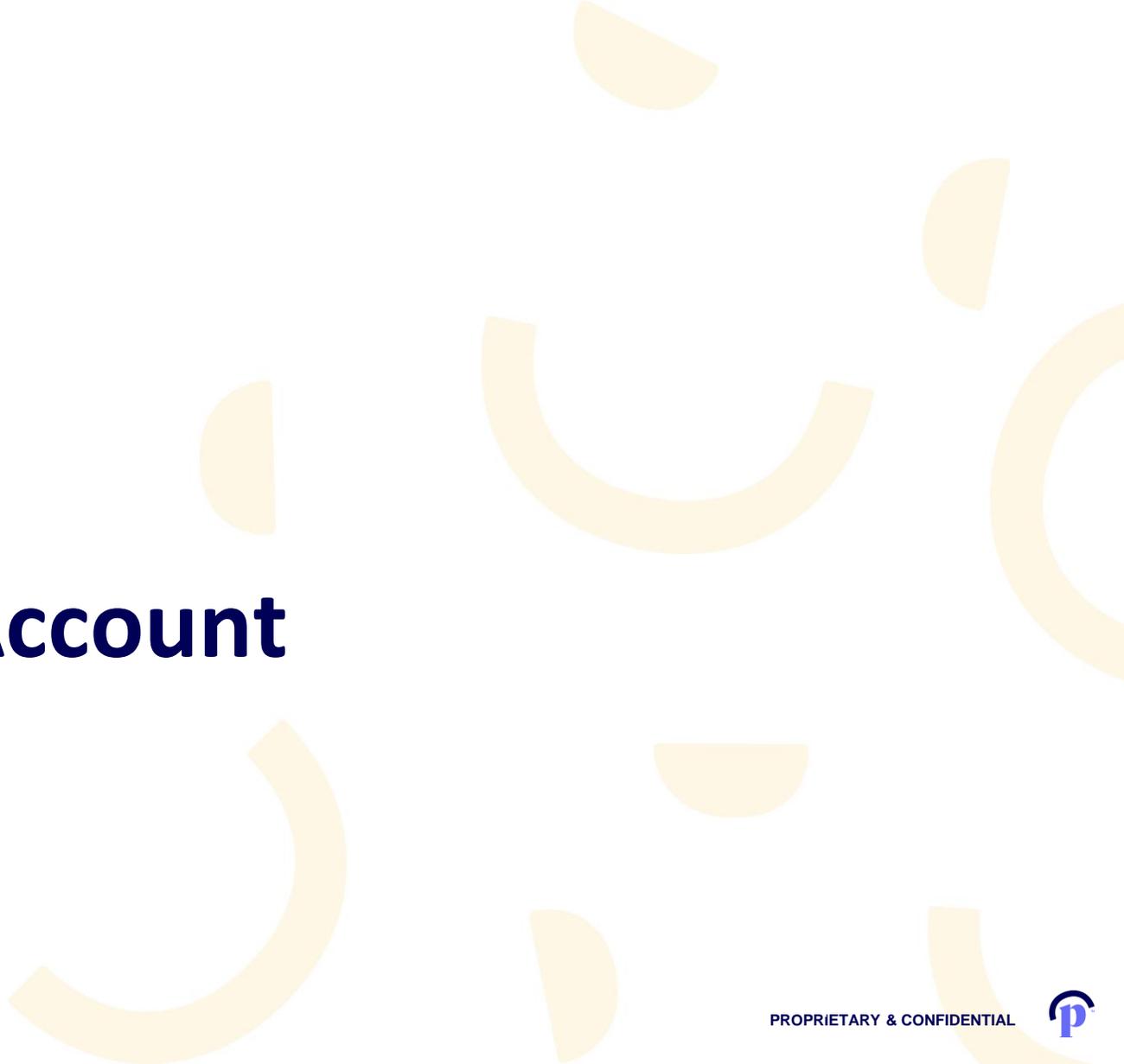




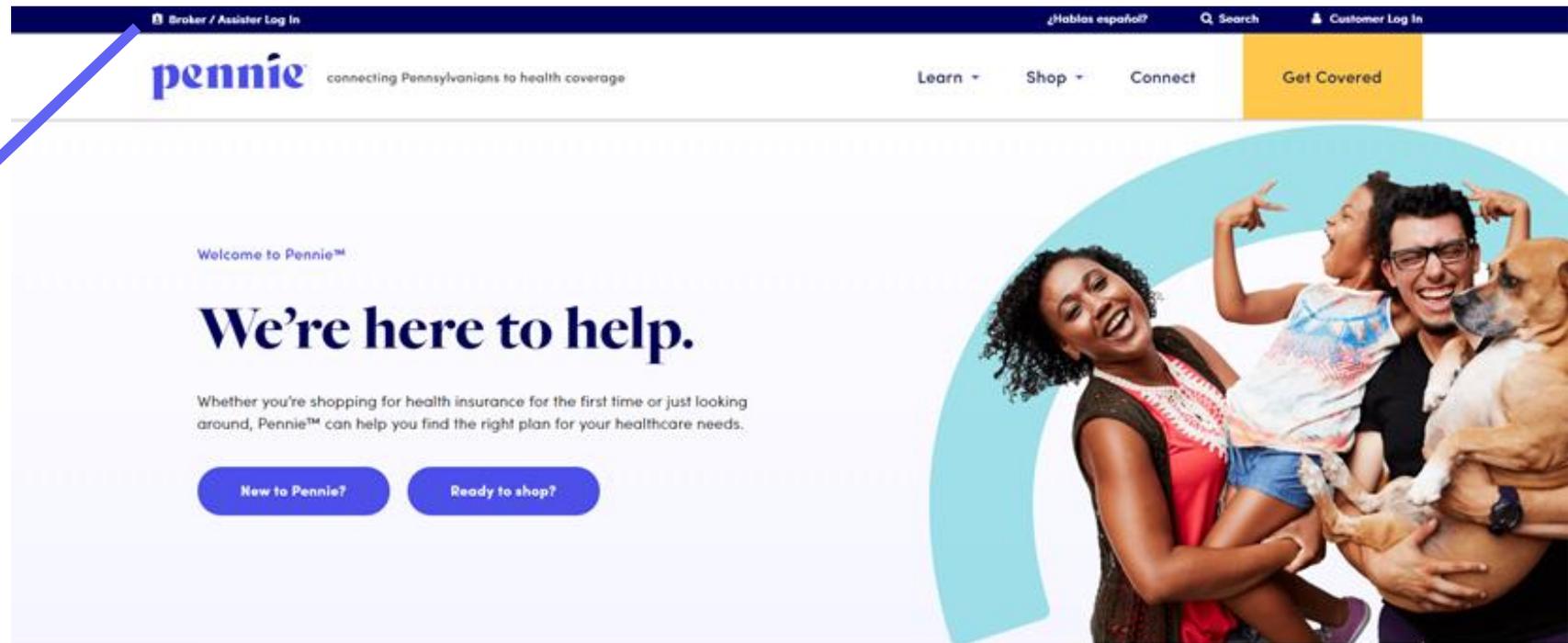
How to set up an Agency Manager Account



Multi-factor Authentication

- There are two stages of multi-factor authentication in claiming your Pennie account
 - 1) Multi-factor authentication is required by Pennie to claim an agency manager account. ***Note: It is highly recommended that you utilize a telephone number that directly connects to your phone (direct phone without IVR; or mobile device)***
 - 2) For customer security, Pennie highly recommends the use of Duo Mobile app as the primary means of multi-factor authentication. [Click here for a how-to guide](#)

Step-by-step



Setting Up Your Agency Manager Account

Broker/Assister Account Login

Do you already have a Pennie account? *

No

I need to create an account and: *

I am an Agency Manager or Principal

Submit



Setting Up Your Agency Manager Account

Once selected, you will see this page

If you are an independent broker or the first broker in your agency to sign up on Pennie, then you will create the agency and your own broker information. Visit the [Broker page](#) to view manuals to create your account.

Click [here](#) to create your account.



Step – by – Step

Setting up your Agency/Agency Manager Portal



New Agency Manager Account Set-Up

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

Basic Information

First Name * Patty

Last Name * McBride

Email Address * patty.mcbride@yopmail.co

Confirm Email Address * patty.mcbride@yopmail.co

Phone Number * 717 460 7307

Security Question

Security Question * What is your oldest sibling's middle name?
 james

Set Password

Password *

Confirm Password *

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

Cancel Submit

Enter the Name and Contact Information for the Organization's Account Manager.

This is the person responsible for management of the organization's Pennie Account.

Later CEO, CFO, Principal, and Executive/Owner information will be collected.

Step – by – Step

Setting up your Agency/Agency Manager Portal



Steps

1. Agency Information

2. Location and Hours

3. Agency Manager Information

4. Public Profile

5. Document Upload

6. Certification Status

These are the six steps that Agencies (Entities) and Agency Managers need to follow to set up to claim their Pennie Entity Account.

Step – by – Step

Setting up your Agency/Agency Manager Portal



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

Federal Employer ID Number (EIN) x

An EIN is required to apply for registration on Pennsylvania Exchange. If you are part of an agency then you may also use your Agency's EIN.

[Get an EIN Now](#)

Enter the Agency's informaiton.

Note: if you do not have an EIN, Pennie will help you get one in one click.



Step – by – Step

Setting up your Agency/Agency Manager Portal

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 Add Sub-Site

PRIMARY SITE:

Primary Location Name *

Primary Location Email

Primary Contact Number

Address line 1 *

Address line 2

City *

State *

Zip Code *

Hours Of Operation

Monday	<input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/>	Closed	<input checked="" type="checkbox"/> Apply to all weekdays
Tuesday	<input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/>	Closed	
Wednesday	<input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/>	Closed	
Thursday	<input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/>	Closed	
Friday	<input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/>	Closed	
Saturday	<input type="radio"/>	<input type="text" value="closed"/>	To	<input type="text" value="closed"/>	<input checked="" type="radio"/>	Closed	
Sunday	<input type="radio"/>	<input type="text" value="closed"/>	To	<input type="text" value="closed"/>	<input checked="" type="radio"/>	Closed	

Save Primary-Site

Fill in the PRIMARY SITE's (your home office/headquarters) location, contact information, and hours of operation.

Tip on entering business hours – note the "Apply to all weekdays" check box next to Monday? It will make entering and editing business hours much easier.

When you have entered all information for the PRIMARY SITE, click "Save Primary Site."

Step – by – Step

Setting up your Agency/Agency Manager Portal

The screenshot displays the 'Step 2: Agency Location and Hours' configuration page. On the left, a 'Steps' sidebar lists the following steps: 1. Agency Information (checked), 2. Location and Hours (highlighted in blue), 3. Agency Manager Information, 4. Public Profile, 5. Document Upload, and 6. Certification Status. The main content area shows a 'PRIMARY SITE' entry for 'Clover Leaf ...' at '1140 Beech Street, 15301'. Below this entry are 'BACK' and 'NEXT' buttons. A blue 'Add Sub-Site' button is positioned above the 'NEXT' button and is circled in yellow.

If you have more than one business location, you may add additional locations, by clicking on "Add Sub-Site."

Step – by – Step

Setting up your Agency/Agency Manager Portal

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 Add Sub-Site

+ PRIMARY SITE: Clover Leaf ... 1140 Beech Street, 15301

- SUB-SITE:

SUB-SITE Location Name *

SUB-SITE Location Email

SUB-SITE Contact Number

Address line 1 *

Address line 2

City *

State *

Zip Code *

Hours Of Operation

Monday <input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/> Closed	<input checked="" type="checkbox"/> Apply to all weekdays
Tuesday <input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/> Closed	
Wednesday <input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/> Closed	
Thursday <input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/> Closed	
Friday <input type="radio"/>	<input type="text" value="9:00 am"/>	To	<input type="text" value="5:00 pm"/>	<input type="radio"/> Closed	
Saturday <input type="radio"/>	<input type="text" value="closed"/>	To	<input type="text" value="closed"/>	<input type="radio"/> Closed	
Sunday <input type="radio"/>	<input type="text" value="closed"/>	To	<input type="text" value="closed"/>	<input checked="" type="radio"/> Closed	

Save Sub-Site

Enter information for Sub-Site: location name, contact information and business hours.

Click "Save Sub-Site" to complete your addition.

Step – by – Step

Setting up your Agency/Agency Manager Portal

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 * mm

Individual Email *

Primary contact number *

Business Contact Phone Number

Alternate Phone Number

Fax Number

Preferred Method of Communication *

Business Name *

Federal Employer Identification Number (EIN) * What if I don't have an EIN?

Business Address

Select Agency Location *

Current Location

Correspondence Address

Address line 1 *

Address line 2

City *

State *

Zip code *

Add the Agency Manager's information.

Click "Next" when ready to review the Agency Manager's profile.



Step – by – Step

Setting up your Agency/Agency Manager Portal

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
- Workers Compensation
- Property/Casualty

Your Website Address 

Your Public Email 

Education

About Me

Upload Photo business woman.jpg

You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

Select the information that you wish to have visible on the Agency's public profile in Pennie.

When complete, click "Next" to move on to document upload.

Step – by – Step

Setting up your Agency/Agency Manager Portal

To upload any documents (if needed), click on "Choose File" and "Upload."

Once complete, click "Finish" to complete your Agency/Agency Manager Account set up.

Steps

- ✓ Agency Information
- ✓ Location and Hours
- ✓ Agency Manager Information
- ✓ Public Profile
- ✓ Document Upload**
- ✓ Certification Status

Step 5: Document Upload

Choose File File chosen Upload

You can upload a JPG, GIF, PNG, Word Doc/x, or PDF. File size limit is 5MB.

Date	File Name	Action
------	-----------	--------

Back Finish

Steps

- ✓ Agency Information
- ✓ Location and Hours
- ✓ Agency Manager Information
- ✓ Document Upload**
- ✓ Certification Status

Step 5: Document Upload

Choose File PA 084368123.docx Upload

You can upload a JPG, GIF, PNG, Word Doc/x, or PDF. File size limit is 5MB.

Date	File Name	Action
------	-----------	--------

Back Finish

File is uploaded successfully.

OK

Steps

- ✓ Agency Information
- ✓ Location and Hours
- ✓ Agency Manager Information
- ✓ Public Profile
- ✓ Document Upload**
- ✓ Certification Status

Step 5: Document Upload

Choose File No File chosen Upload

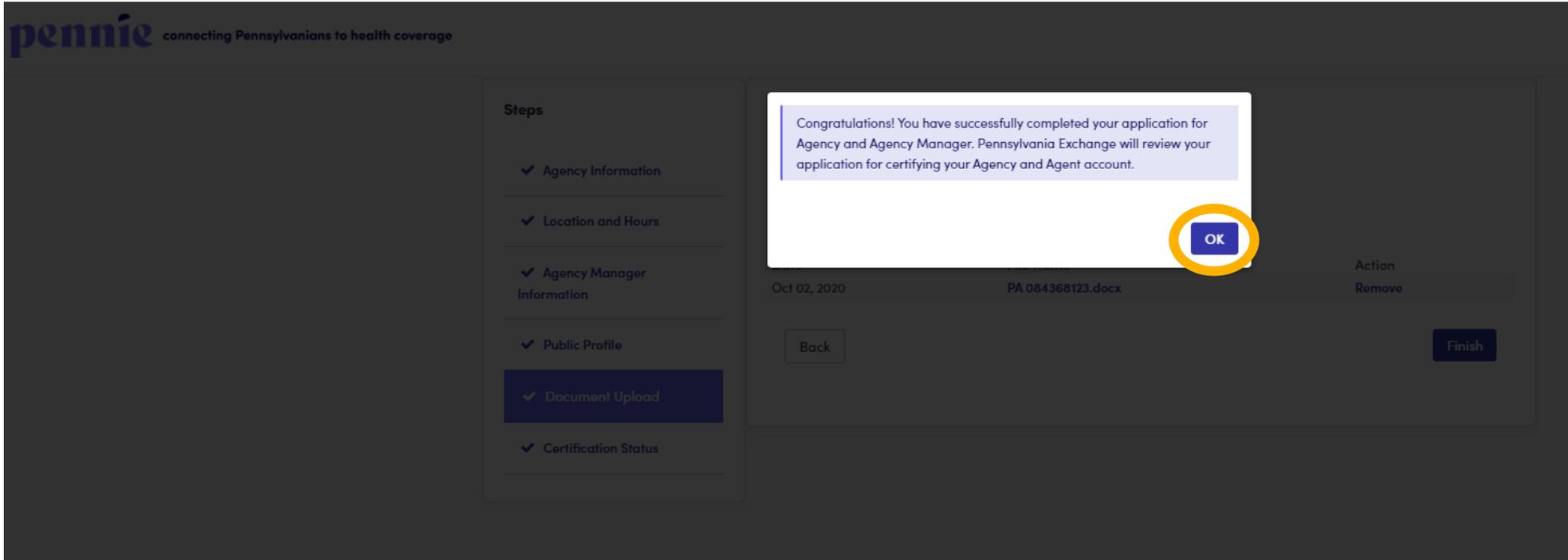
You can upload a JPG, GIF, PNG, Word Doc/x, or PDF. File size limit is 5MB.

Date	File Name	Action
Oct 02, 2020	PA 084368123.docx	Remove

Back Finish

Step – by – Step

Setting up your Agency/Agency Manager Portal



You have now completed and claimed your Agency/Agency Manager Account.

Click "OK" to view your status.

Step – by – Step

Setting up your Agency/Agency Manager Portal

The screenshot displays the Agency Manager Portal interface. At the top, a navigation bar contains several tabs: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. These tabs are highlighted with a yellow oval. Below the navigation bar, there is a sidebar on the left titled 'Steps' with four menu items: Agency Information, Location and Hours, Document Upload, and Certification Status. The 'Certification Status' item is highlighted with a blue button. The main content area is titled 'Agency Certification Status' and displays the following information: Application Submission Date 10-02-2020, Certification Status Pending, Certification Number, and Certification Date.

As the Agency Manager, you will be able to access your Agency Management Portal.

Note the functionalities – Agents, Admin Staff, Agency Delegations (Book of Business), Agency Account, My Delegations (the Agency Manager's Book of Business), and Agency Manager's Profile.

Step – by – Step

Setting up your Agency/Agency Manager Portal

The image displays five navigation menus from the Agency/Agency Manager Portal, each with a blue header and a white dropdown menu:

- Agents - Admin Staff - Ag**
 - View Agent List
 - Search an Agent
 - Add a New Agent
 - Agent Delegation History
- Admin Staff - Agency Del**
 - View Admin Staff List
 - Add a New Admin Staff
- Agency Delegations - Agency A**
 - Pending Delegation Requests
 - Active Individuals
 - Transfer Individuals
- Agency Account - My I**
 - Agency Information
 - Location and Hours
 - Document Upload
 - Agency Certification
- My Delegations - My Agent Pro**
 - Pending Delegation Requests
 - Active Individuals
 - Inactive Individuals
 - My Dashboard
- My Agent Profile -**
 - Agent Information
 - Profile
 - Certification Status
 - Status

Overview of Agency/Agency Manager Functionalities

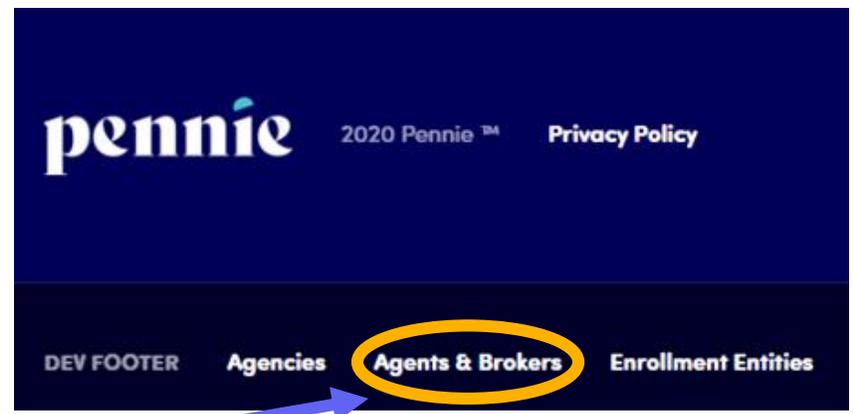
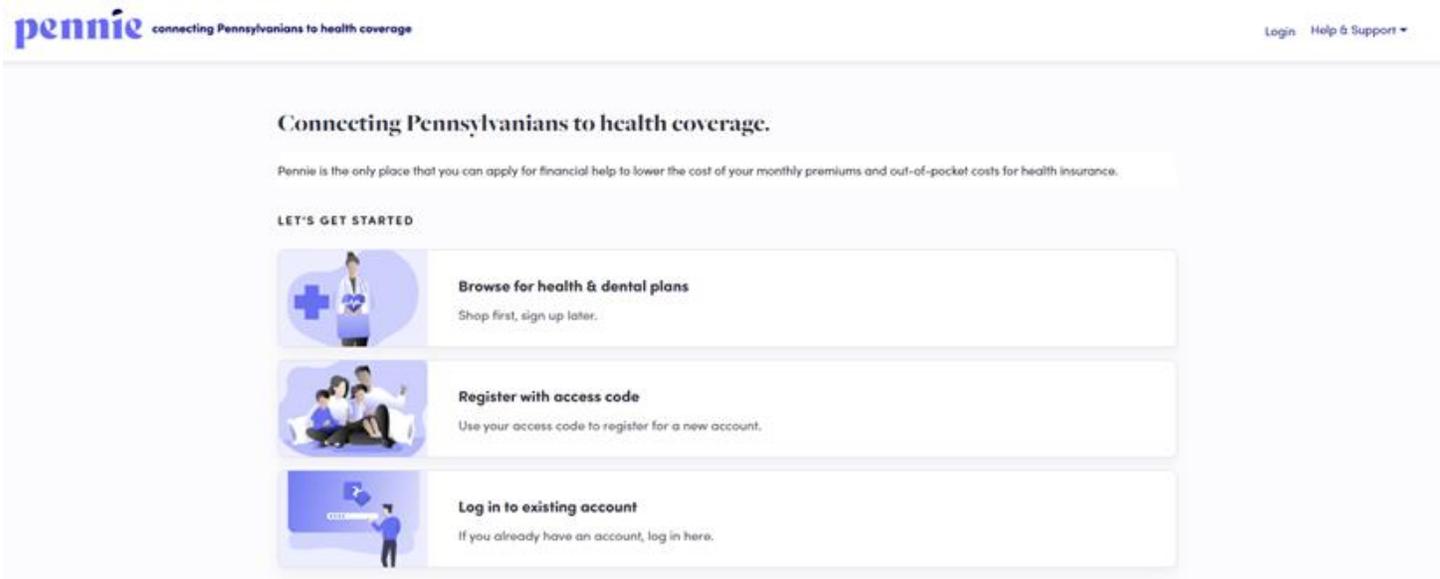


Agent/Producer Profile

Establishing your producer profile

Step – by – Step

Setting up your Agency/Agency Manager Portal



Your Producer Profile



New Agent 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 *

Set Password

Password *

Confirm Password *

I have read and agree to the Privacy Policy

Enter verify your name, email address, phone number, and establish an account password.

Click "Submit" to proceed.



Your Producer Profile

New Agent Registration

Steps

1. Agent Information

2. Profile

New producers to Pennie have two steps to claiming their Pennie Producer Account:

- 1) Review and complete Agent Information
- 2) Review and complete their Pennie public Profile.

Your Producer Profile



New Agent Registration

Steps

1. Agent Information
2. Profile

Agent 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*

Primary contact number*

Business Contact Phone Number

Alternate Phone Number

Fax Number

Preferred Method of Communication*

Business Name*

Federal Employer Identification Number (EIN)* [What if I don't have an EIN?](#)

Business Address

Address line 1*

Address line 2

City*

State*

Zip code*

Correspondence Address

Same as business address

Address line 1*

Address line 2

City*

State*

Zip code*

Producer will verify:

- Name
- PA Producer Number
- NPN
- License Renewal Date
- Email, Phone, and Address
- FEIN (individual or agency)

Click "Next" to proceed.

Federal Employer ID Number (EIN)

An EIN is required to apply for registration on Pennie. If you are part of an agency than you may also use your Agency's EIN.

[Get an EIN Now](#)

Close



Your Producer Profile



New Agent Registration

Steps

- ✓ Agent Information
- 2. Profile

Step 2: 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
 Workers Compensation
 Property/Casualty

Your Website Address

Your Public Email

Education

About Me

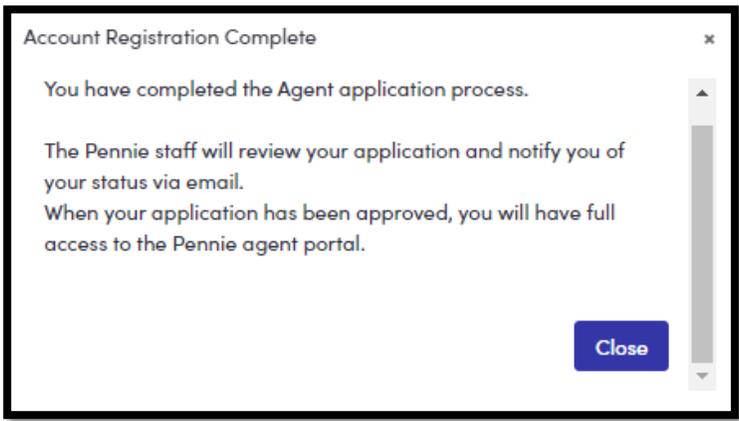
Upload Photo feagaergh.jpg

You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

Provide information relevant to your Pennie public profile:

- Languages Spoken
- Product Expertise
- Website, Email Address, Education, and Photo.

Click "Finish" to complete the account claiming process.



pennie

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WEB

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