

pennie
connecting Pennsylvanians to health coverage

Step-by-Step Guide for Multi-Factor Authentication

A Supplement To The Account Claiming Process

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Dear Sam Elliot,

An account has been created for you on Pennie.

In order to access your account, either [click here](#) or copy the following link into your web browser window:

<https://enroll.pennie.com/hix/account/user/activation/d67e8866fbc842d28033712adc13f357>

This is a one-time login and will **expire after 60 days**.

If you need further assistance, please contact Pennie at the toll-free number below.

Thank you,

Pennie

Click on the link that you received in your notification from Pennie to claim your account.

It will take you to a secure portal to begin the account claiming process.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

New Account Set-Up

You should know

Pennie Customer Service has created an account for you on the Pennie. In order to access your account, please follow this simple process.

Your information

Pennie Customer Support Staff has provided the following phone numbers for you:

(***)**-7307

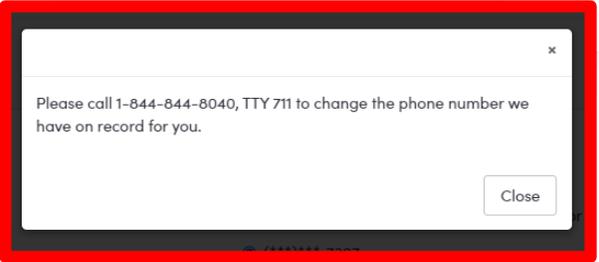
In order to verify your identity, we will send you a verification code to the selected number, using a voice call or text message

[This is not my phone number](#)

For the initial account claiming process, you will receive a text message or voice call to provide a Verification Code.

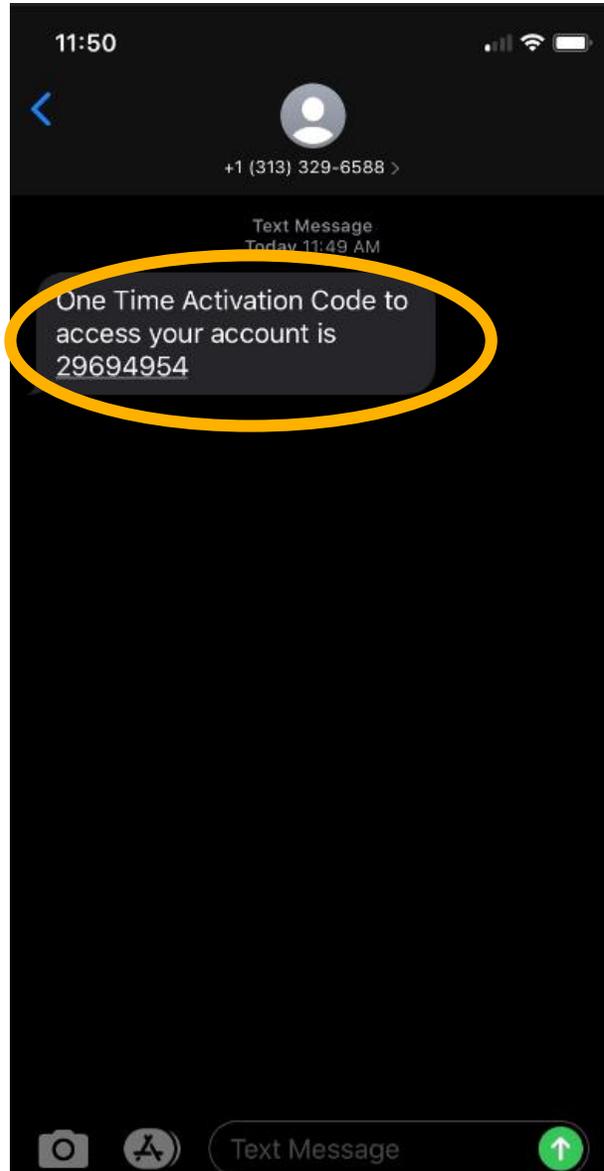
Once, the code is entered, click "Verify."

If the number listed is not your number, you may contact the Pennie Call Center for Technical Support +1 (844) 844-8040



Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



For the initial account claiming process, you will receive a text message or voice call to provide a Verification Code.

Once, the code is entered, click "Verify."

Remember: you may contact the Pennie Call Center for Technical Support +1 (844) 844-8040

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



The image displays four screenshots of account setup forms:

- New Agency Manager Account Set-Up:** Fields include First Name (Paty), Last Name (McBride), Email Address (paty.mcbride@yopmail.co), Confirm Email Address (paty.mcbride@yopmail.co), and Phone Number (717 460 7307). Security Question: "What is your oldest sibling's middle name?" (james). Password fields are present. A "Submit" button is circled in yellow.
- New Agent Account Set-Up:** Fields include First Name (Jessica), Last Name (Jones), Email Address (jessica.jones@yopmail.com), Confirm Email Address (jessica.jones@yopmail.com), and Phone Number (717 460 7307). Security Question: "What is your oldest sibling's middle name?" (james). Password fields are present. A "Submit" button is circled in yellow.
- New Entity Account Set-Up:** Fields include First Name (Sandra), Last Name (Long), Email Address (sandra.long@yopmail.com), Confirm Email Address (sandra.long@yopmail.com), and Phone Number (717 460 7307). Security Question: "What is your oldest sibling's middle name?" (james). Password fields are present. A "Submit" button is circled in yellow.
- New Counselor Account Set-Up:** Fields include First Name (Kim), Last Name (Lee), Email Address (kim.lee@yopmail.com), Confirm Email Address (kim.lee@yopmail.com), and Phone Number (717 460 7307). Security Question: "What is your oldest sibling's middle name?" (james). Password fields are present. A checkbox "I have read and agree to the Privacy Policy" is checked. A "Submit" button is circled in yellow.

Depending upon your user role, you will verify your name, contact information, sets a security question, and an account password.

Click "Submit" when ready to claim your Pennie Account.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾

PENNSYLVANIA Health Exchange

Protect Your Pennie Account

Two-factor authentication enhances the security of your account by using a secondary device to verify your identity. This prevents anyone but you from accessing your account, even if they know your password.

This process will help you set up your account with this added layer of security.

[What is this?](#) [Need help?](#)

Powered by Duo Security

Start setup

Click “Start Setup” to begin your Pennie Multi-Factor Authentication process.

For security, you will be asked for your Multi-Factor Authentication code each time you log into your Pennie Account.



Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾

What type of device are you adding?

- Mobile phone** RECOMMENDED
- Tablet** (iPad, Nexus 7, etc.)
- Landline**
- Security Key** (YubiKey, Feitian, etc.)
- Touch ID**
Requires Chrome on macOS to use Touch ID.

[What is this?](#) [Need help?](#)

Powered by Duo Security

Continue

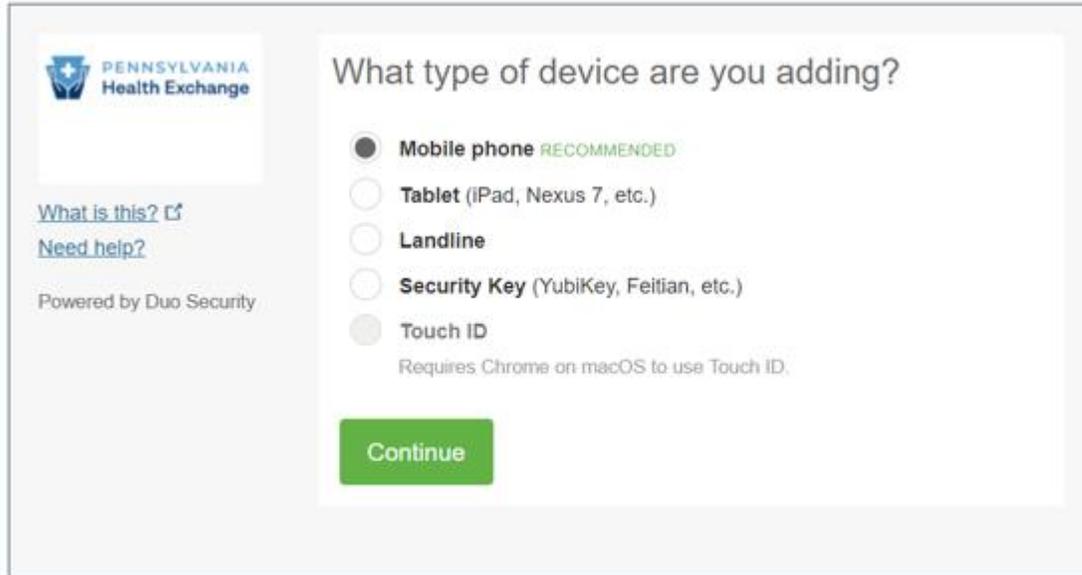
You will need to add a device to perform the Multi-Factor Authentication each time you log into your Pennie account.

Mobile phone is the recommended option.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

Important Note



Why do we recommend a Mobile Phone or Tablet for Multi-Factor Authentication?

- **Mobile phone is the recommended option because you have two signals – the primary signal is 4G/5G and the secondary is Wi-Fi.**
- **A mobile ready tablet is preferred over a landline for the same reason.**
- **In the event that you do not wish to use a mobile phone for Multi-Factor Authentication, a tablet connected to Wi-Fi is a great solution for Duo Mobile.**
- **A landline that is directly connected to an individual's workstation or desk that DOES NOT REQUIRE AN EXTENSION can also be a strong source for Multi-Factor Authentication.**

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



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What is this? [Need help?](#)

Powered by Duo Security

Enter your phone number, check the verification box, and click continue.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾

What type of phone is 717-460-7307?

- iPhone
- Android
- Windows Phone
- Other (and cell phones)

Back Continue

Select you type of mobile device.

Click Continue

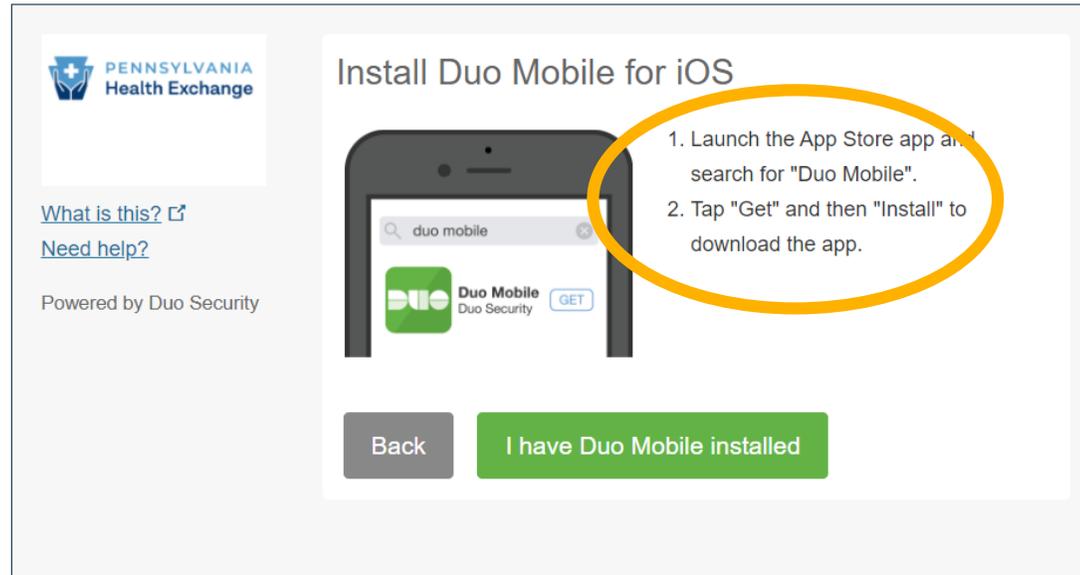


Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾

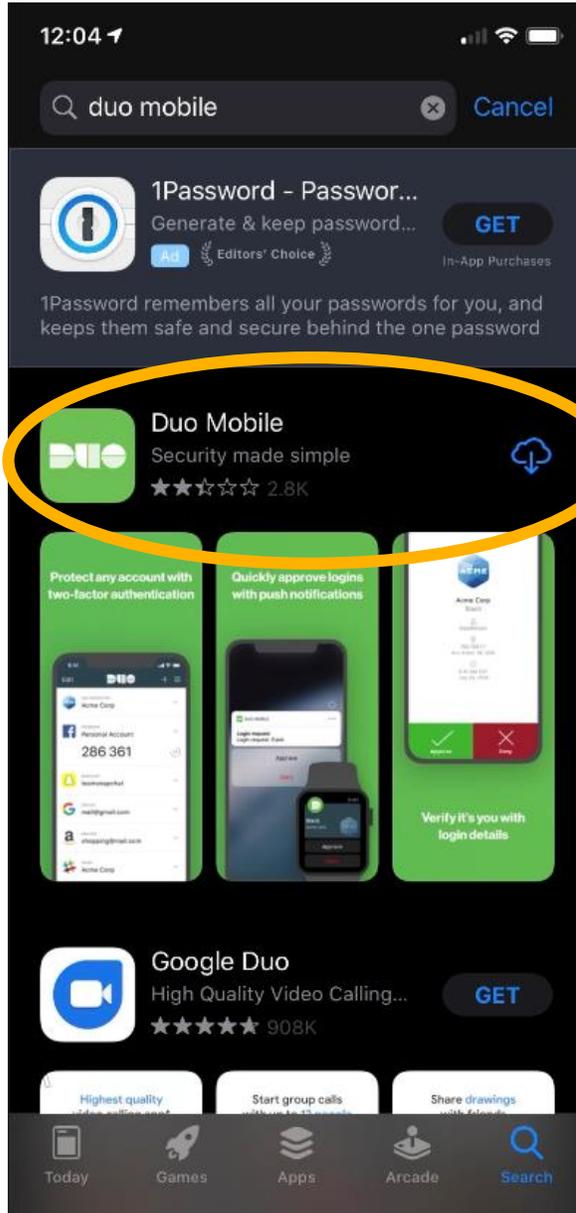


Download Duo Mobile app onto your mobile device.

The next page shows an example of what the download looks like from the App Store.

Multi-Factor Authentication

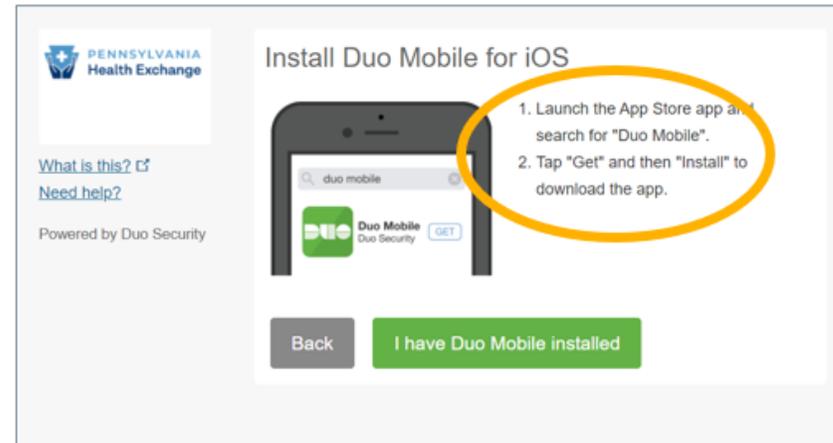
A Step – by – Step Guide to setting up your organization's profile in Pennie.



Visit the App Store

Download Duo Mobile app onto your mobile device.

When you have the app downloaded, click “I have Duo Mobile installed” to proceed.

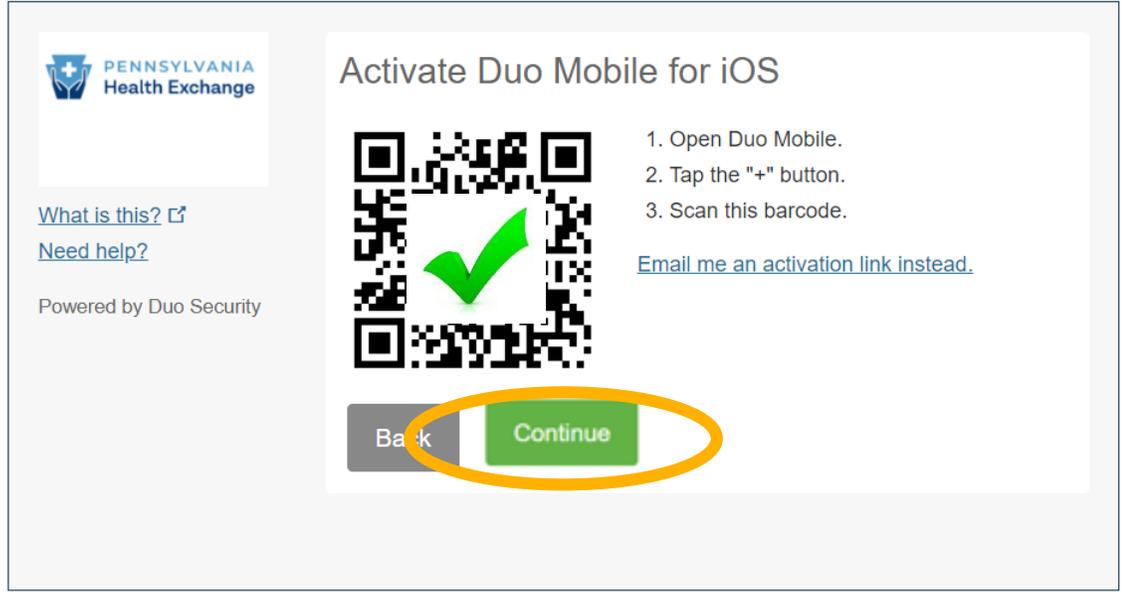


Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾



Open the Duo Mobile app on your device.

The app will ask you to scan the QR Code on your screen.

Scan it – you will see a green check mark appear.

Click Continue to proceed.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



[Log In](#) [Help & Support](#) ▾

Log In

Email Address

Password

Remember Me

[Forgot password?](#)

Welcome to your Pennie Account.

Enter Your Email Address

Enter Your Password

Click “Log In”



Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Log In Help & Support ▾



[What is this?](#) [Need help?](#)

Powered by Duo Security

Device:

Choose an authentication method

<input checked="" type="checkbox"/> Duo Push RECOMMENDED	<input type="button" value="Send Me a Push"/>
<input type="checkbox"/> Call Me	<input type="button" value="Call Me"/>
<input type="checkbox"/> Passcode	<input type="button" value="Enter a Passcode"/>

For Multi-Factor Authentication, you will have the option to select a push notification to Duo Mobile, a call, or you can enter a pass code that has been sent to you via text message.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

PENNSYLVANIA Health Exchange

Device: iOS (XXX-XXX-7307)

Choose an authentication method

- Duo Push RECOMMENDED Send Me a Push
- Call Me Call Me
- Passcode Enter a Passcode

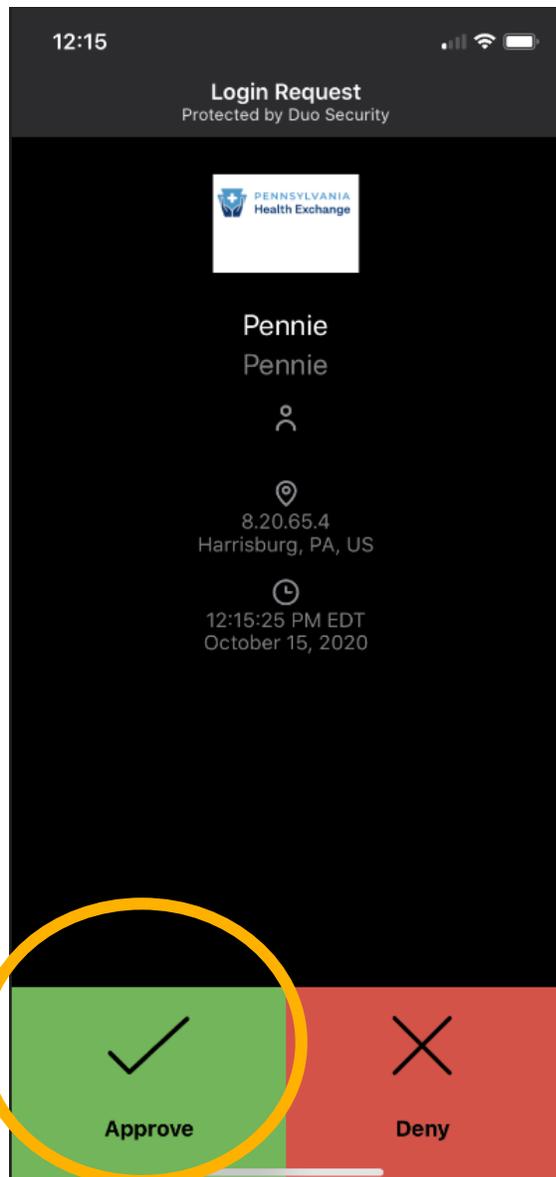
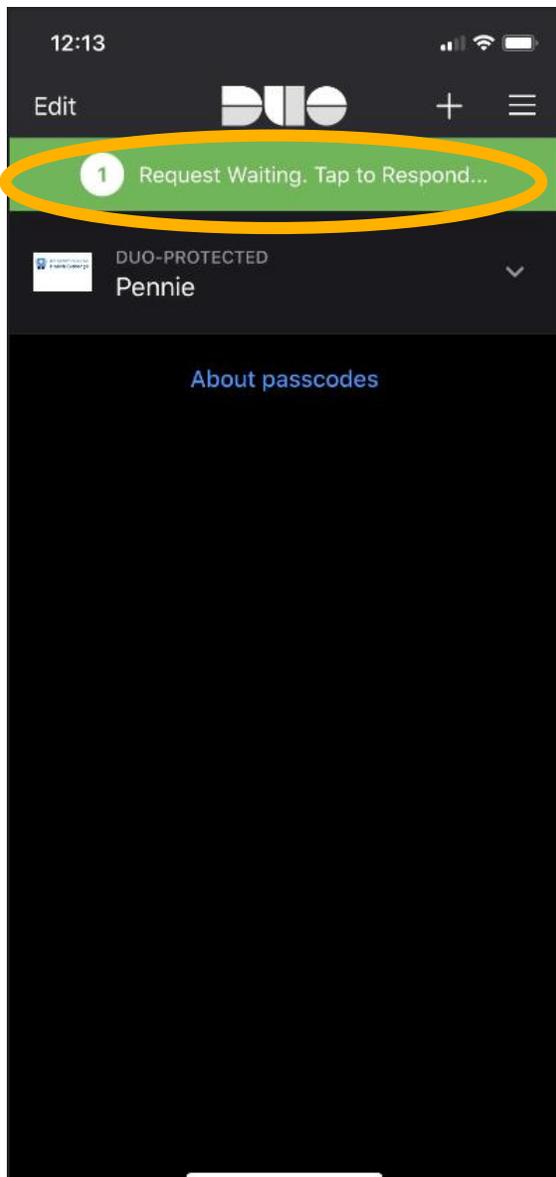
What is this? [↗](#)
Need help?
Powered by Duo Security

Pushed a login request to your device... Cancel

You will see a blue notification at the bottom of the page when your Duo Push Notification has been sent to your mobile device.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

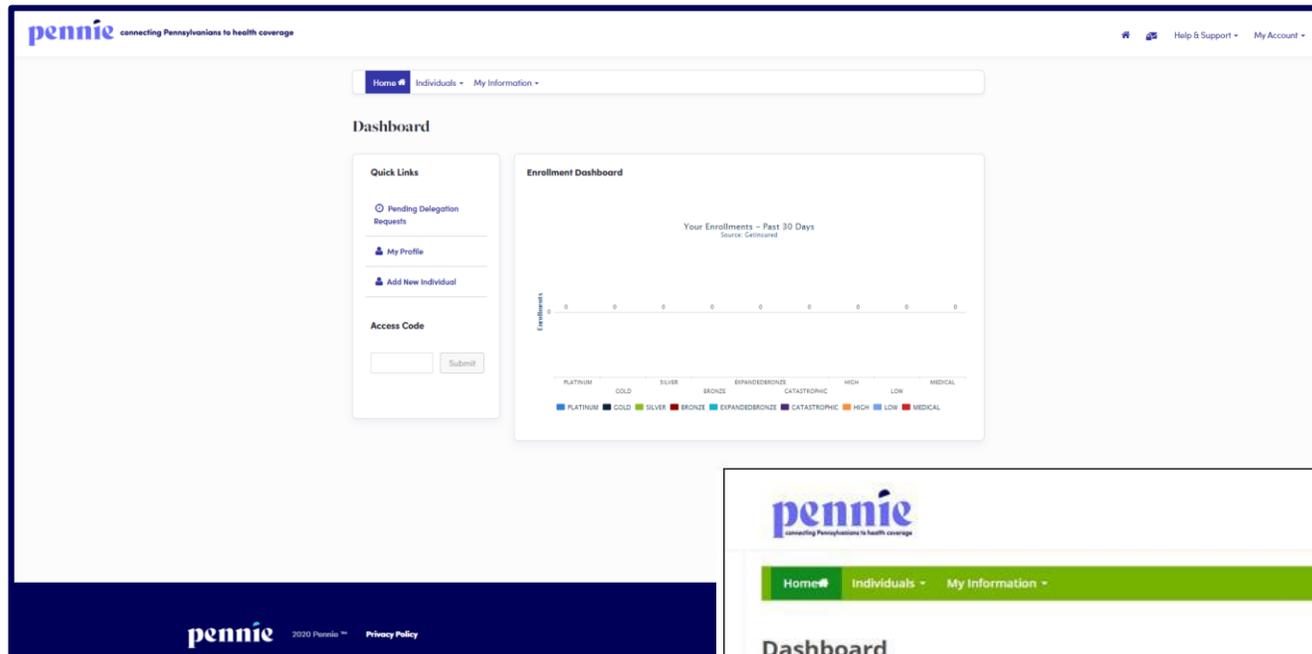


In the Duo Mobile App, you will see one push notification awaiting your verification.

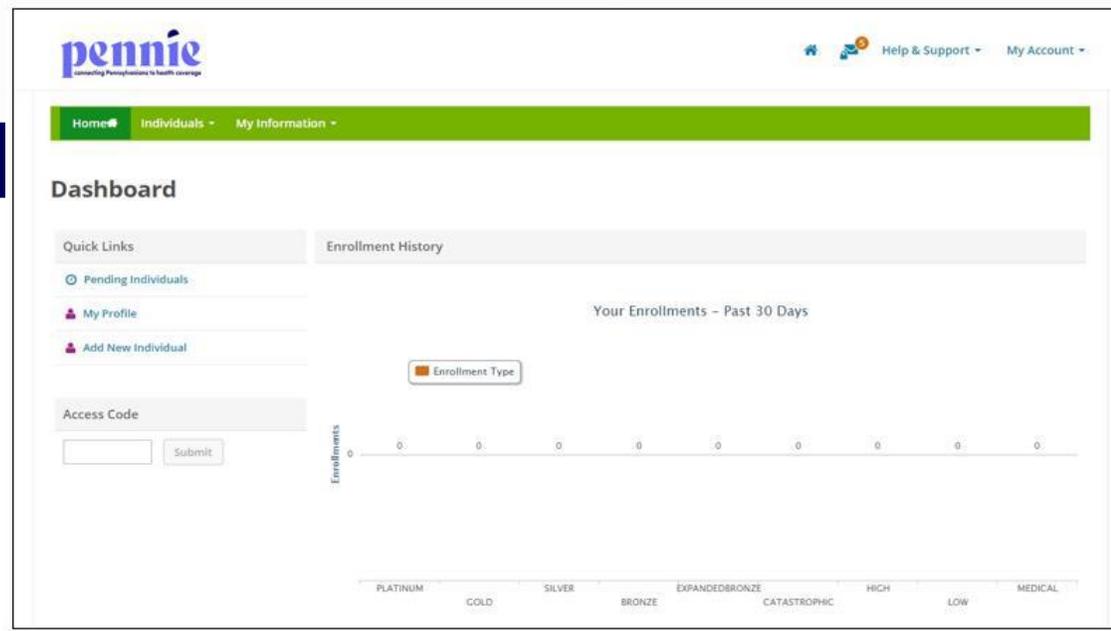
Click the “Approve” box to verify that it is you who are logging into your Pennie account.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

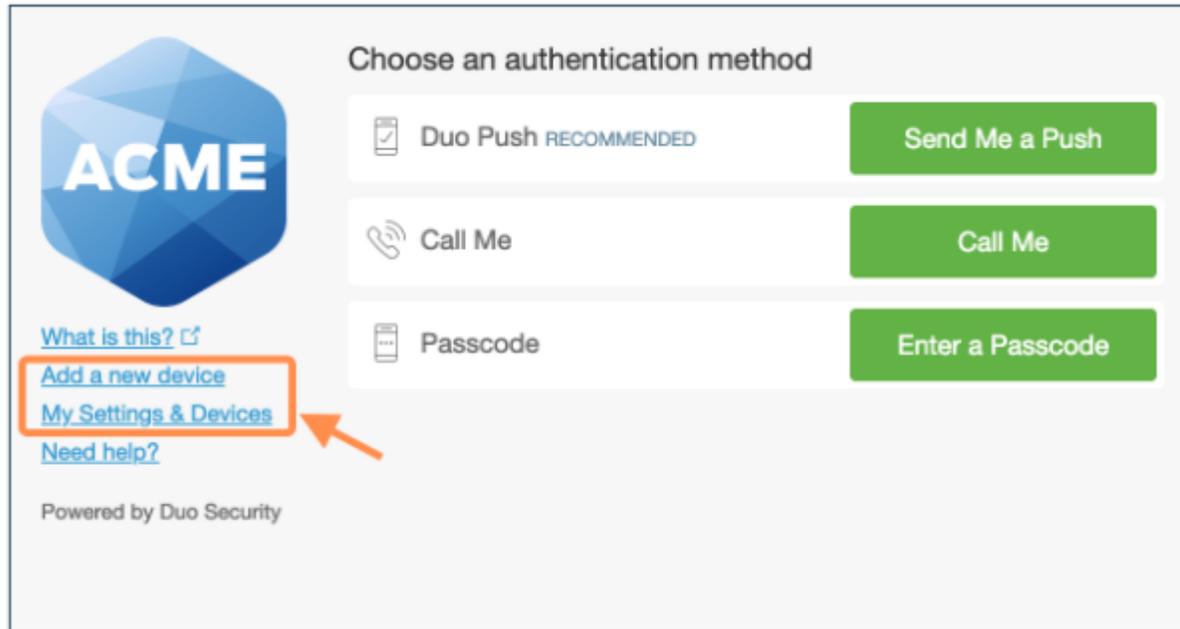


Depending upon your user role, you will now have secure access to the appropriate Dashboard for your user role.



Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

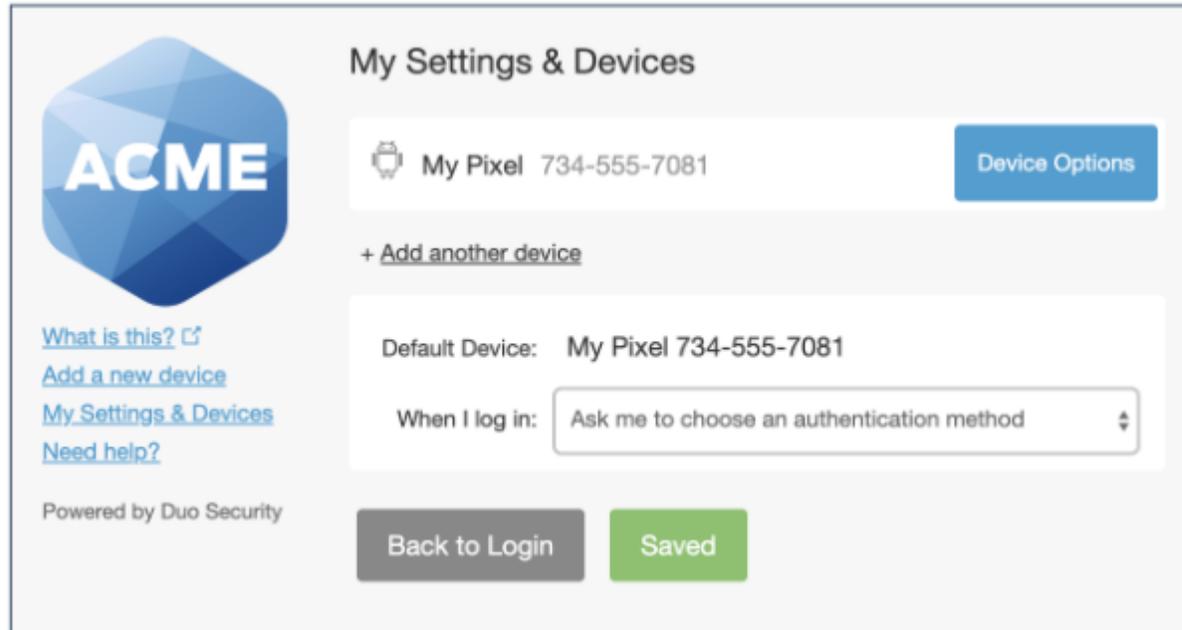


After passing primary authentication, users see Add a New Device and My Settings & Devices links on the Duo two-factor authentication page.

Duo authentication is required for access to the self-service pages.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



ACME

My Settings & Devices

My Pixel 734-555-7081 [Device Options](#)

[+ Add another device](#)

Default Device: My Pixel 734-555-7081

When I log in:

[Back to Login](#) [Saved](#)

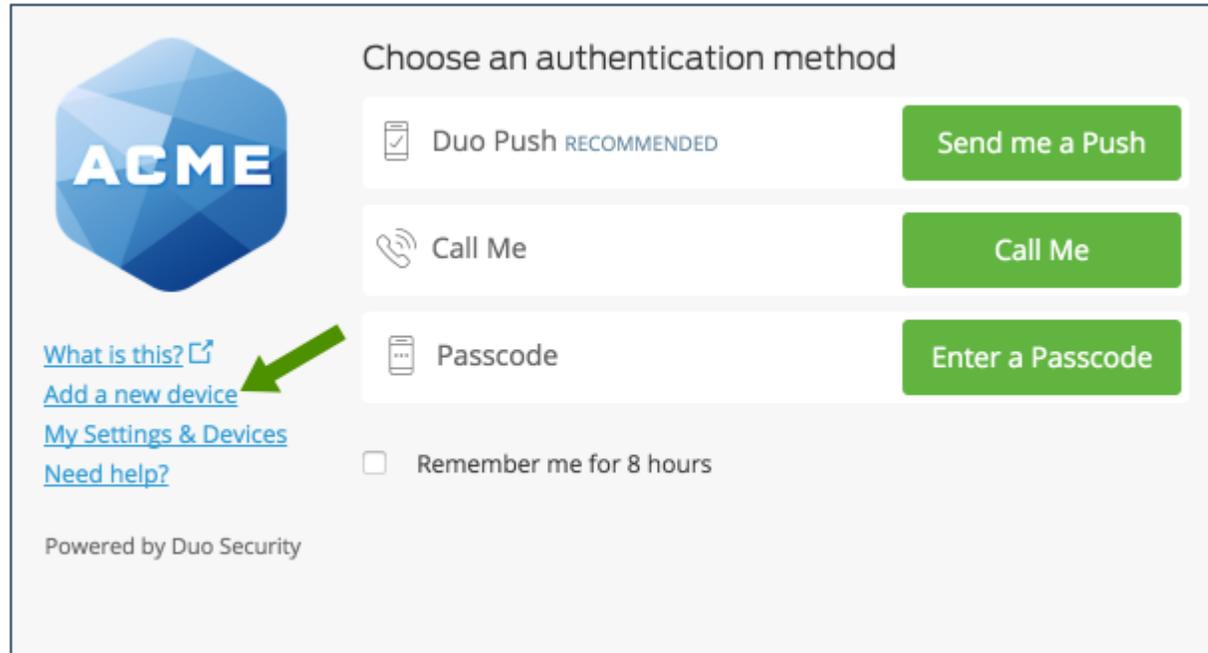
[What is this?](#) [Add a new device](#) [My Settings & Devices](#) [Need help?](#)

Powered by Duo Security

Users can quickly add another authentication device with the **Add a New Device** utility, while clicking **My Settings & Devices** prompts the user to complete two-factor authentication, then shows the device management portal.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

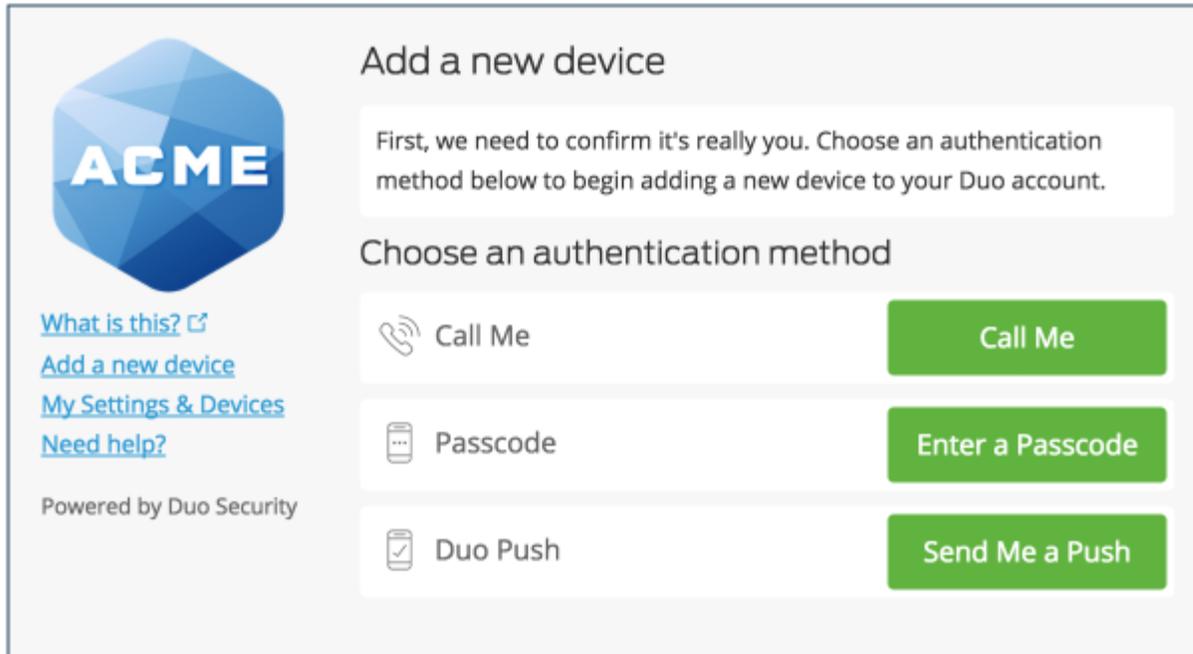


The screenshot shows the Duo Security setup page for an organization named ACME. On the left is the ACME logo. Below it are links for "What is this?", "Add a new device" (highlighted with a green arrow), "My Settings & Devices", and "Need help?". At the bottom left, it says "Powered by Duo Security". The main heading is "Choose an authentication method". There are three options, each with a green button: "Duo Push RECOMMENDED" with "Send me a Push", "Call Me" with "Call Me", and "Passcode" with "Enter a Passcode". At the bottom, there is a checkbox for "Remember me for 8 hours".

To start enrolling a new device, click **Add a new device**.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



ACME

[What is this?](#) [Add a new device](#)
[My Settings & Devices](#)
[Need help?](#)

Powered by Duo Security

Add a new device

First, we need to confirm it's really you. Choose an authentication method below to begin adding a new device to your Duo account.

Choose an authentication method

 Call Me	Call Me
 Passcode	Enter a Passcode
 Duo Push	Send Me a Push

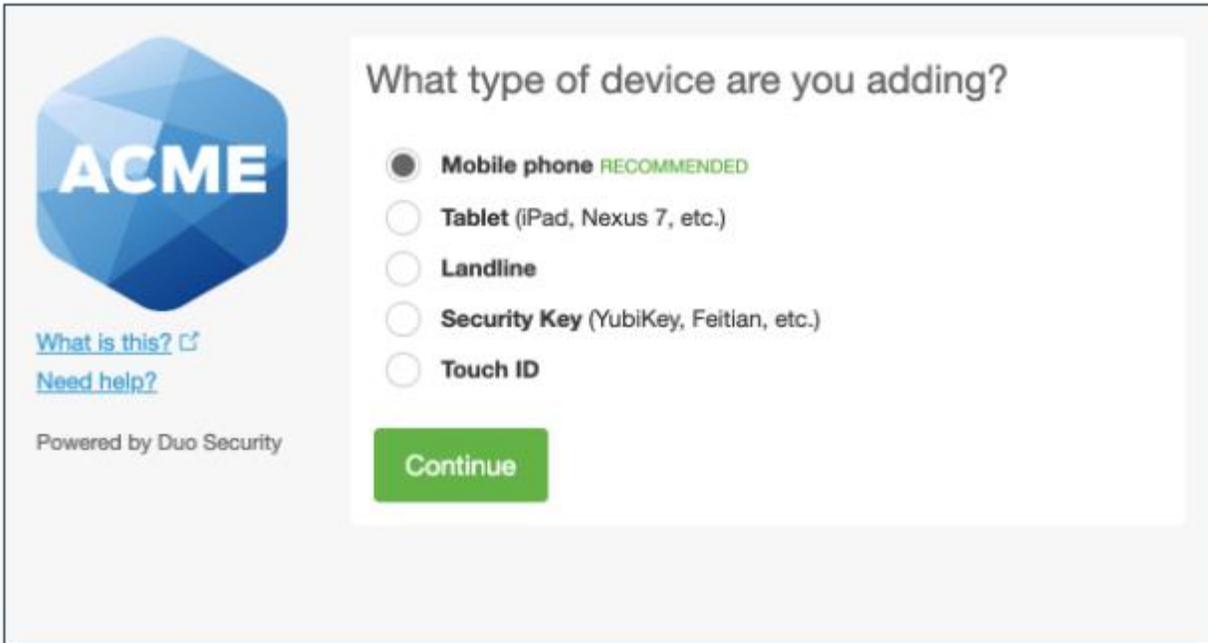
Choose an authentication method and complete two-factor authentication to begin adding your new device.

If you're adding a new device to replace one that you previously activated for Duo Push, don't select the Duo Push authentication method on this page unless you still have the original device.

If you don't have the original device, but you have a new device with the same phone number, then you can authenticate with a phone call or SMS passcode.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

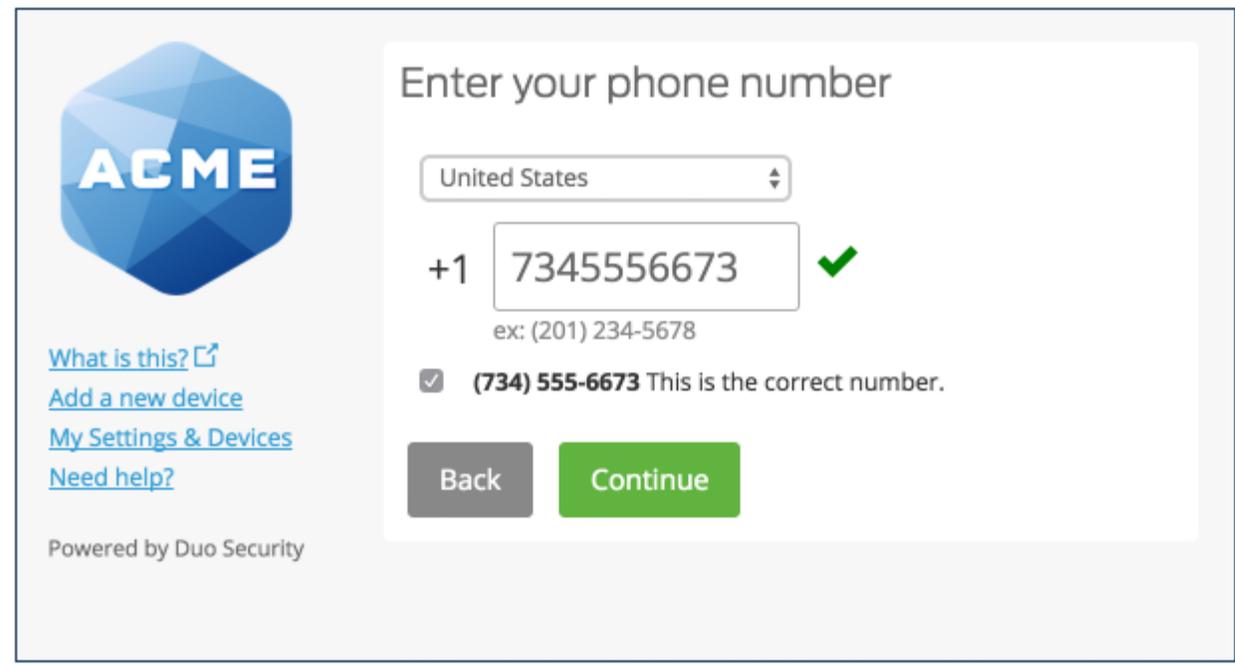


The screenshot shows a web interface for ACME Duo Security. On the left, there is a blue hexagonal logo with the text 'ACME' inside. Below the logo are two links: 'What is this?' and 'Need help?'. At the bottom left, it says 'Powered by Duo Security'. The main content area is titled 'What type of device are you adding?' and contains five radio button options: 'Mobile phone' (which is selected and has 'RECOMMENDED' in green text next to it), 'Tablet (iPad, Nexus 7, etc.)', 'Landline', 'Security Key (YubiKey, Feitian, etc.)', and 'Touch ID'. A green 'Continue' button is located at the bottom of the options.

Proceed with the device enrollment process.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

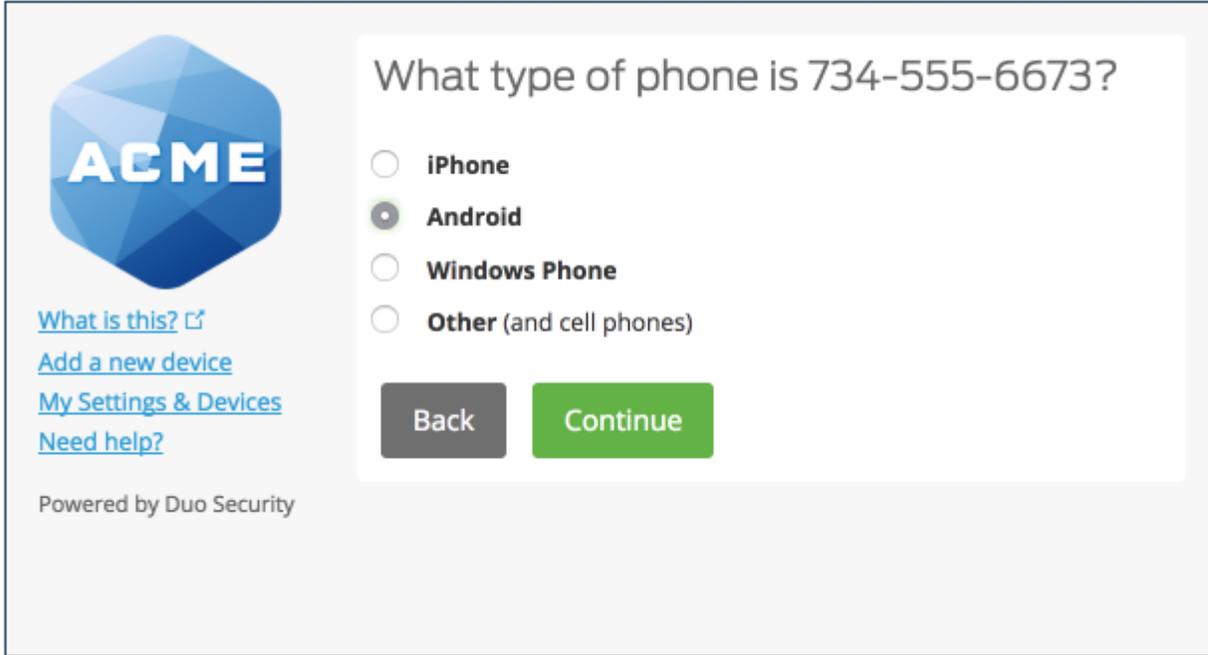


The screenshot shows a web interface for ACME. On the left is the ACME logo and a sidebar with links: 'What is this?', 'Add a new device', 'My Settings & Devices', and 'Need help?'. Below the sidebar is the text 'Powered by Duo Security'. The main content area is titled 'Enter your phone number'. It features a dropdown menu for 'United States', a text input field containing '+1 7345556673' with a green checkmark to its right, and a smaller input field with the example 'ex: (201) 234-5678'. Below the input fields is a checked checkbox with the text '(734) 555-6673 This is the correct number.' At the bottom of the form are two buttons: a grey 'Back' button and a green 'Continue' button.

Enter and confirm the second phone's number.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



ACME

[What is this?](#) [Add a new device](#)
[My Settings & Devices](#)
[Need help?](#)

Powered by Duo Security

What type of phone is 734-555-6673?

iPhone

Android

Windows Phone

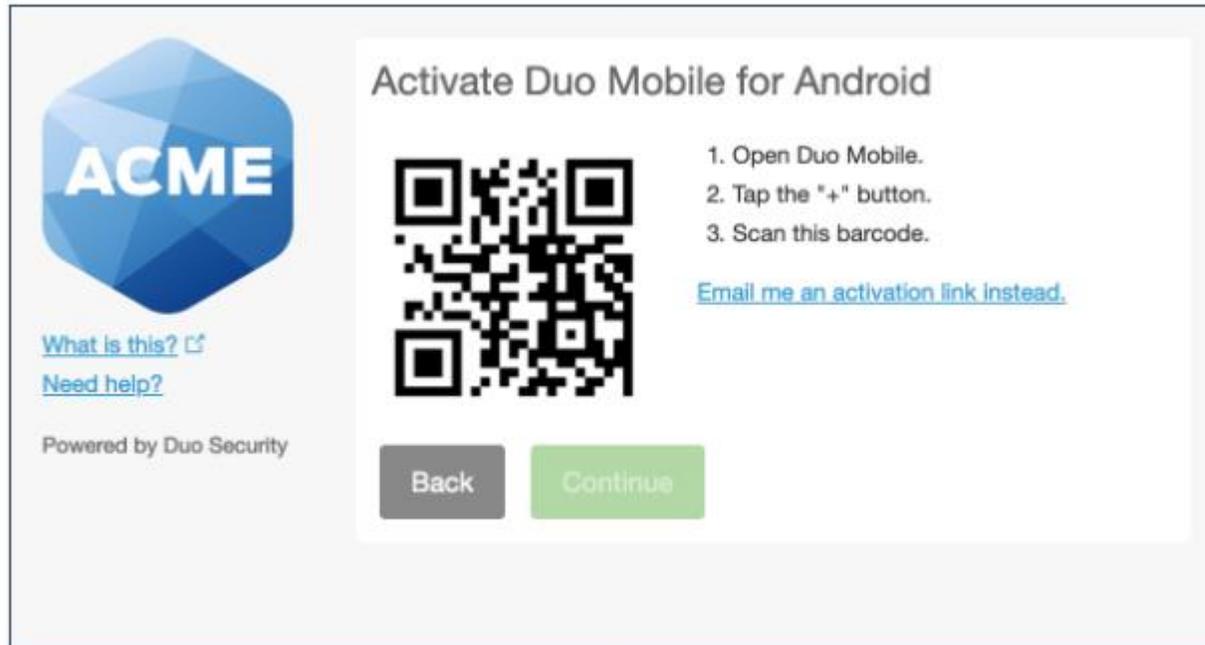
Other (and cell phones)

[Back](#) [Continue](#)

Select the new phone's operating system.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.



Install Duo Mobile on the new phone and scan the barcode to activate.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

ACME

My Settings & Devices

🍏 iOS 734-555-0105 [Device Options](#)

🤖 Android 734-555-6673 JUST ADDED [Device Options](#)

+ [Add another device](#)

Default Device:

When I log in:

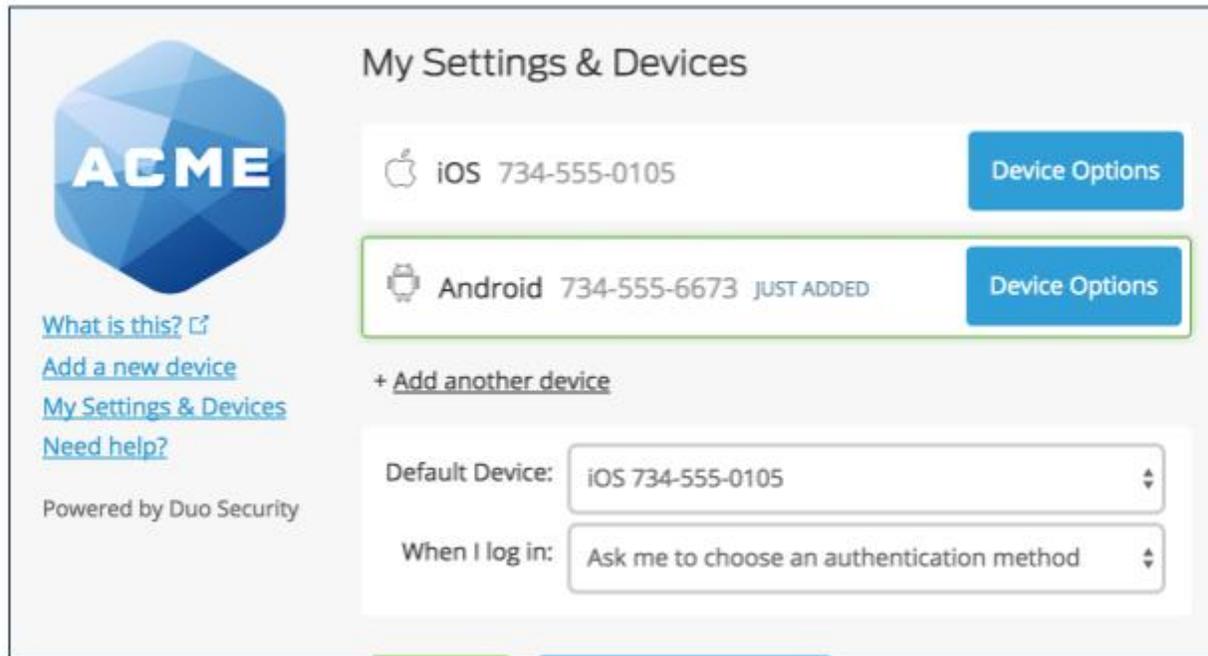
[What is this?](#) [Add a new device](#) [My Settings & Devices](#) [Need help?](#)

Powered by Duo Security

The new phone is added and listed with your other enrolled devices. You can click **Add another device** to start the enrollment process again and add another authenticator.

Multi-Factor Authentication

A Step – by – Step Guide to setting up your organization's profile in Pennie.

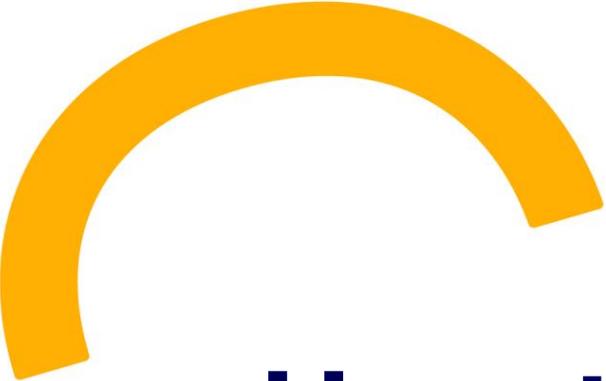


The new phone is added and listed with your other enrolled devices.

You can click **Add another device** to start the enrollment process again and add another authenticator.

Additional information regarding Duo Mobile Settings can be found here:

<https://duo.com/docs/self-service-portal>

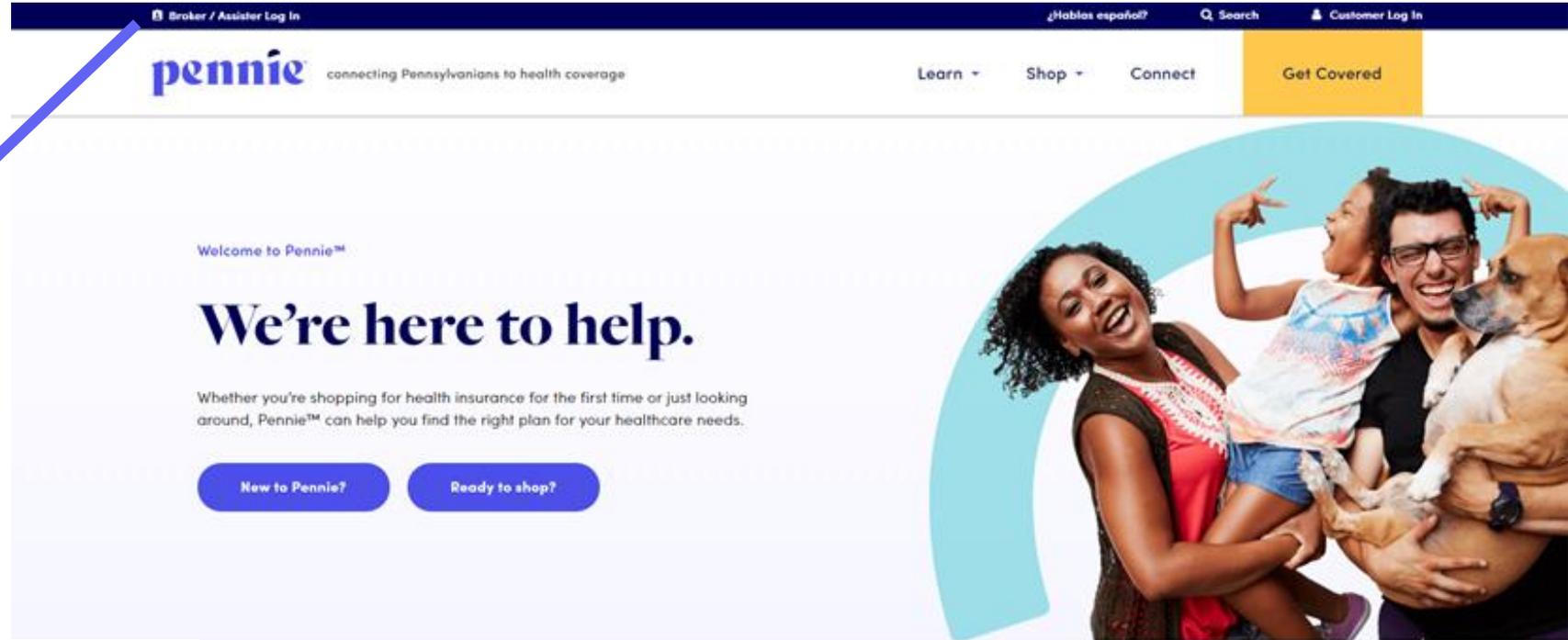


How to set up an Entity/Agency

Establishing Agency/Agency Manager Portal

Step – by – Step

Setting up your Agency/Agency Manager Portal

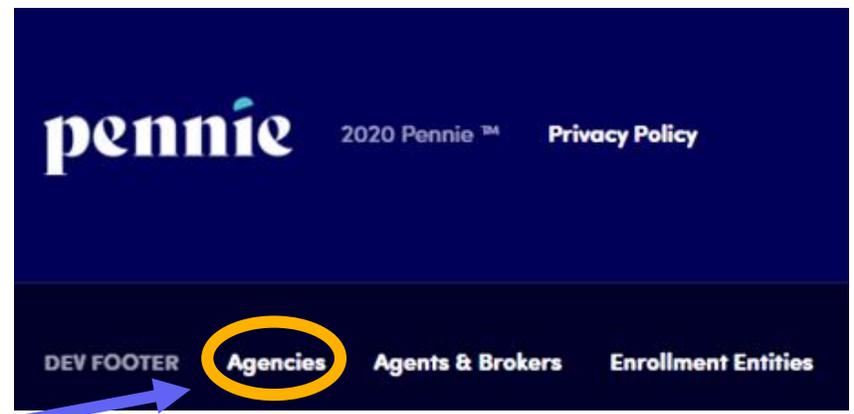
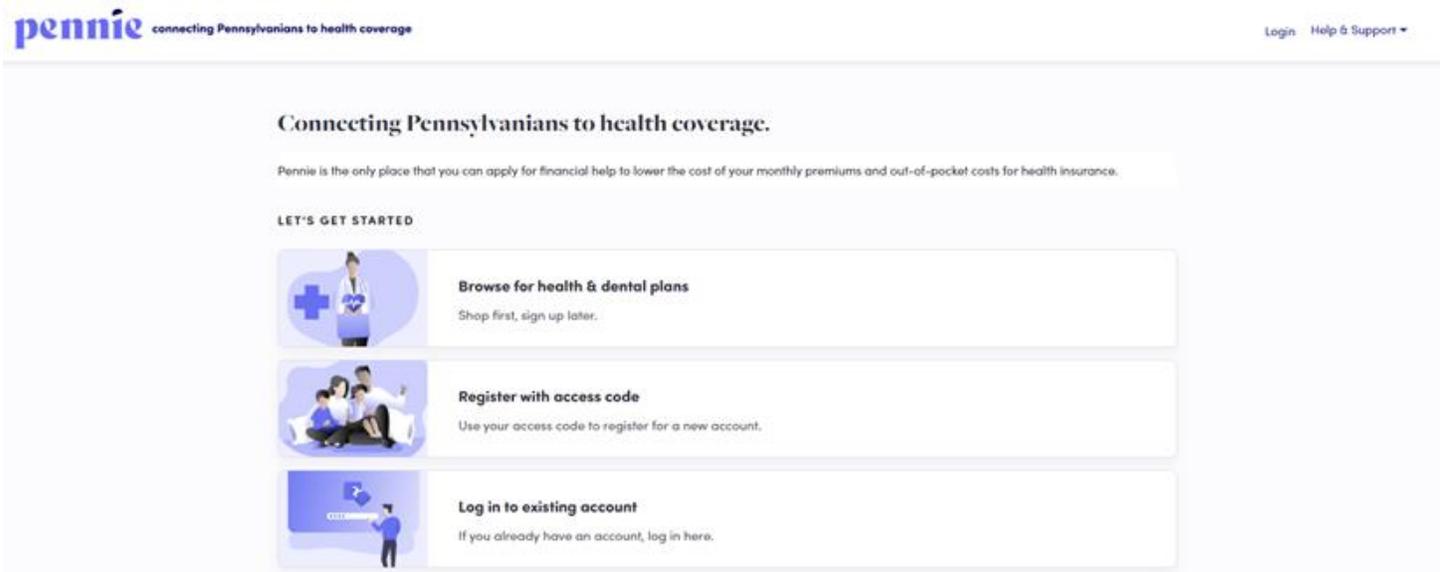


Broker / Assister Log In



Step – by – Step

Setting up your Agency/Agency Manager Portal



Step – by – Step

Setting up your Agency/Agency Manager Portal

pennie connecting Pennsylvanians to health coverage

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](#)

Close

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

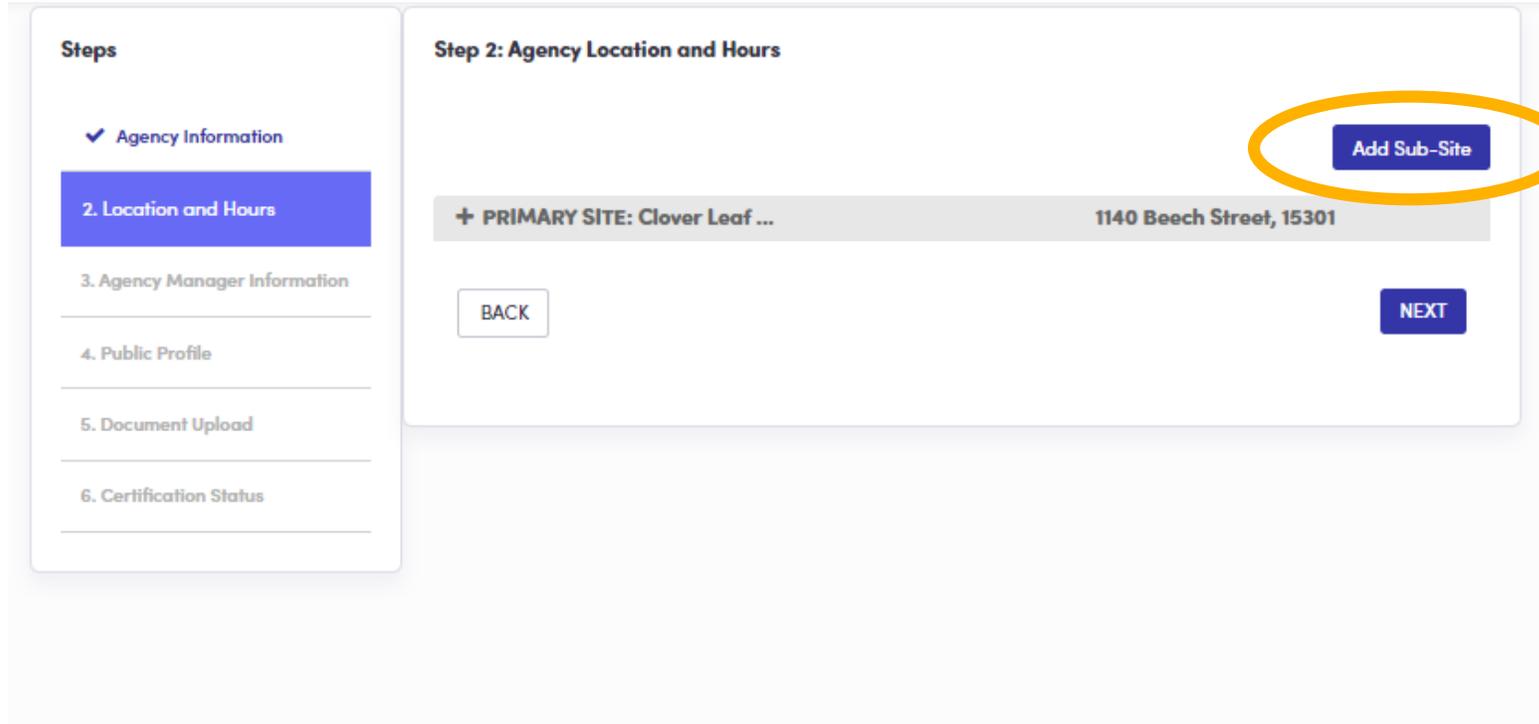
Fill in the PRIMARY SITE's (your home office/headquarters) location, contact information, and hours of operation.

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 shows a multi-step setup process. On the left, a 'Steps' sidebar lists: 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 is titled 'Step 2: Agency Location and Hours'. It features a grey bar for the 'PRIMARY SITE: Clover Leaf ...' with the address '1140 Beech Street, 15301'. Below this bar 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.

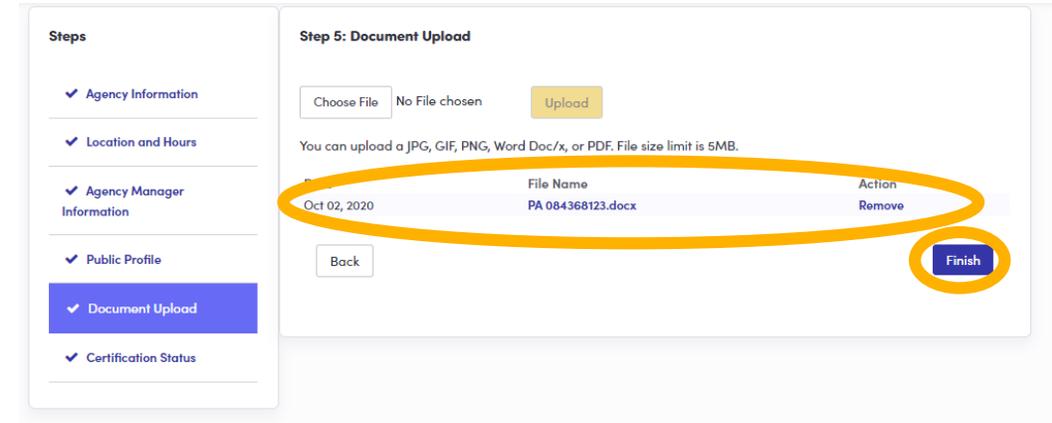
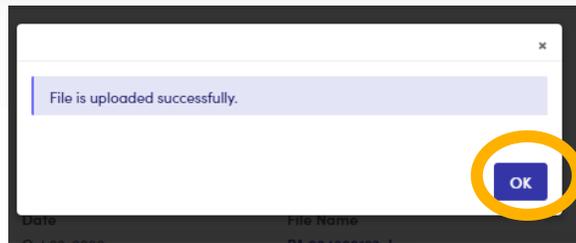
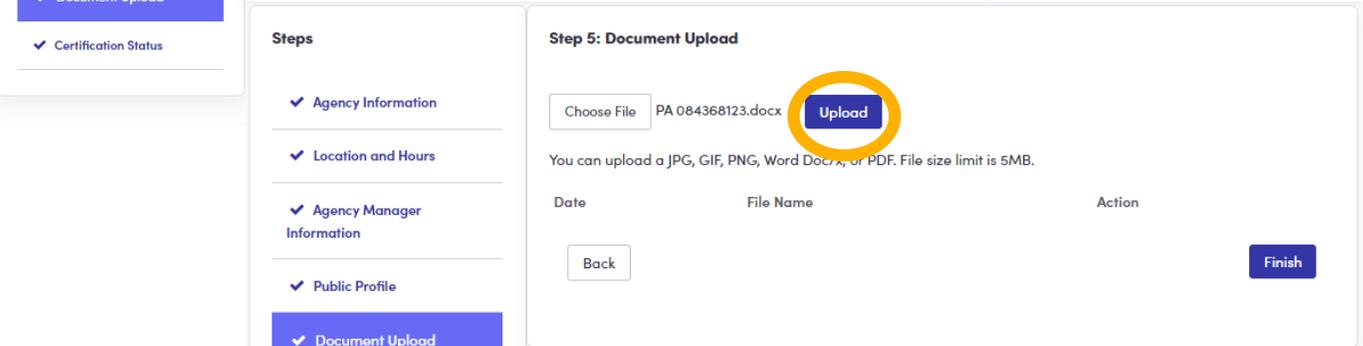
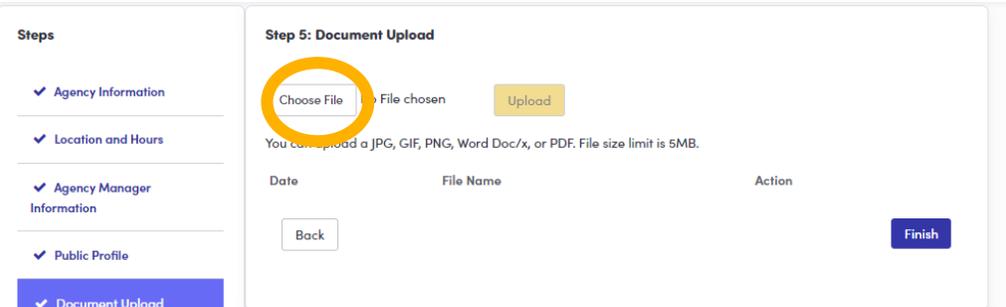
When complete, click "Next" to move on to document upload.

Step – by – Step

Setting up your Agency/Agency Manager Portal

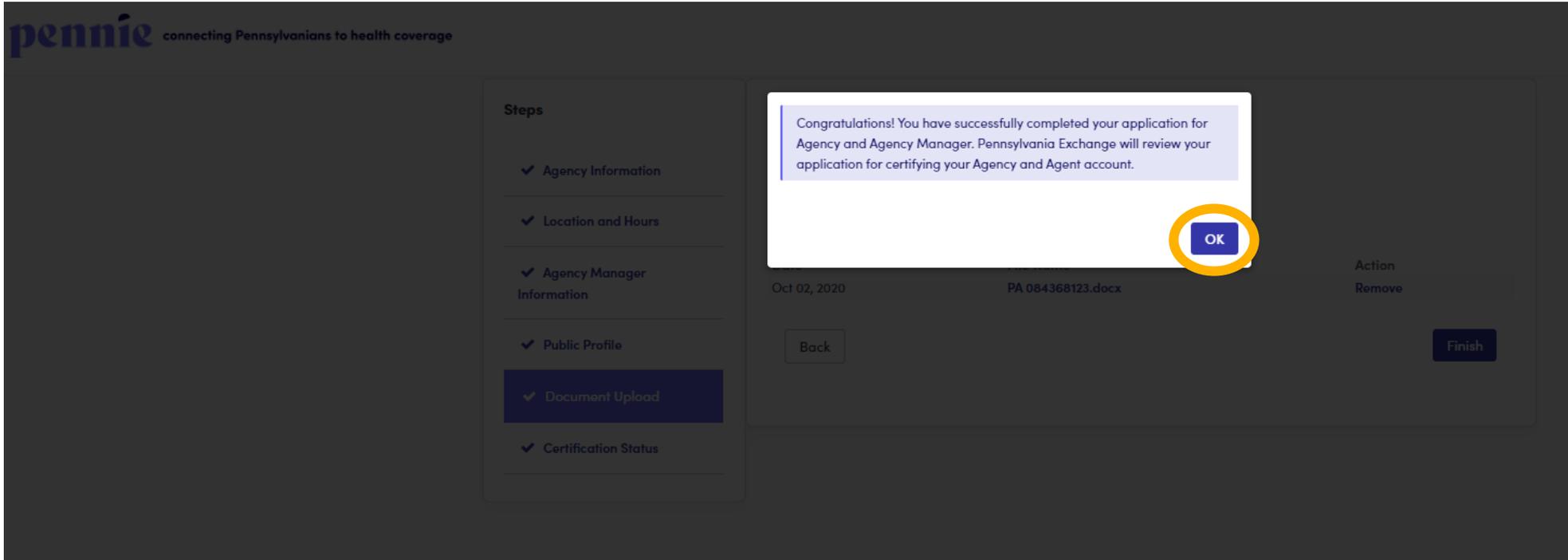
To upload any documents (if needed), click on "Choose File" and "Upload."

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



Step – by – Step

Setting up your Agency/Agency Manager Portal

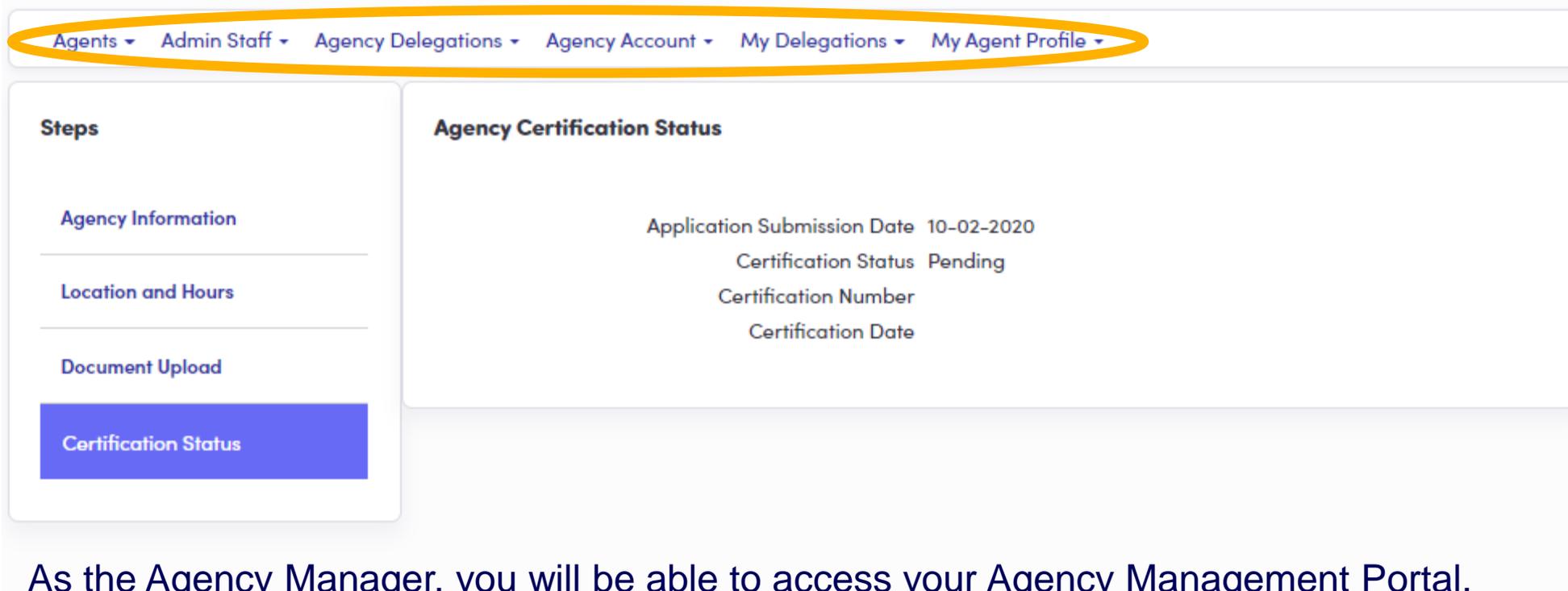


You have now completed and claimed your Agency/Agency Manager Account.

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, the main content area is divided into two sections. On the left, a sidebar titled 'Steps' lists four options: Agency Information, Location and Hours, Document Upload, and Certification Status. The 'Certification Status' option is highlighted with a blue button. On the right, the 'Agency Certification Status' section displays the following information:

Application Submission Date	10-02-2020
Certification Status	Pending
Certification Number	
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 - Agency**
 - View Agent List
 - Search an Agent
 - Add a New Agent
 - Agent Delegation History
- Admin Staff - Agency Delegation**
 - 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

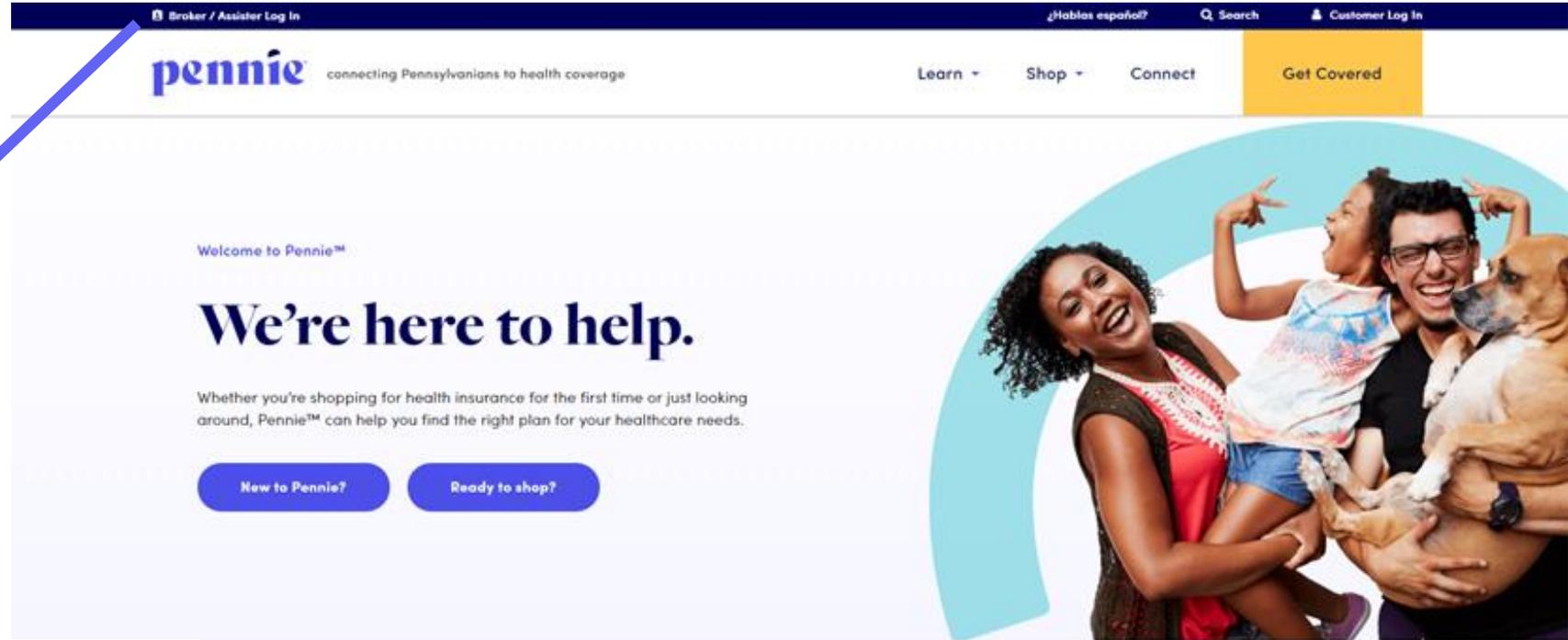


Agent/Producer Profile

Establishing your producer profile

Step – by – Step

Setting up your Agency/Agency Manager Portal

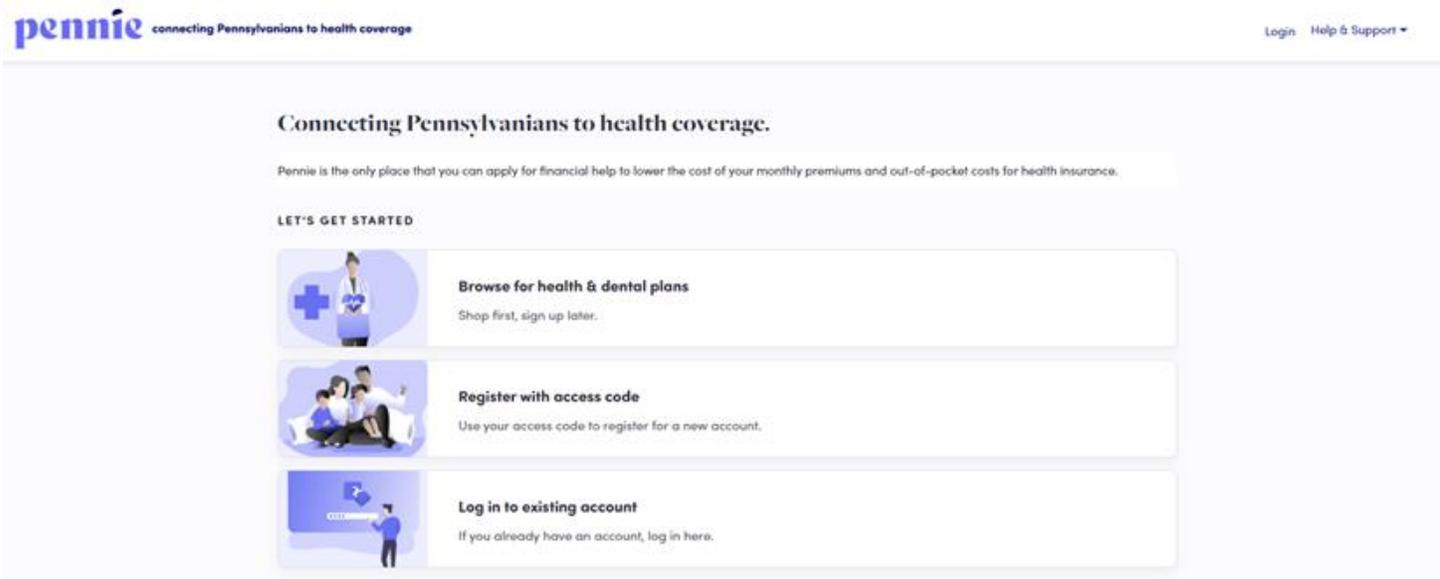


Broker / Assister Log In



Step – by – Step

Setting up your Agency/Agency Manager Portal



Your Producer Profile

pennie connecting Pennsylvanians to health coverage

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*

[Next](#)

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

pennie connecting Pennsylvanians to health coverage

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.

Account Registration Complete

You have completed the Agent application process.

The Pennie staff will review your application and notify you of your status via email.

When your application has been approved, you will have full access to the Pennie agent portal.

pennie

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