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.

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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.

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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

Text Message ▾   **Send code**

This is not my phone number

Please call 1-844-844-8040, TTY 711 to change the phone number we have on record for you.

Close

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
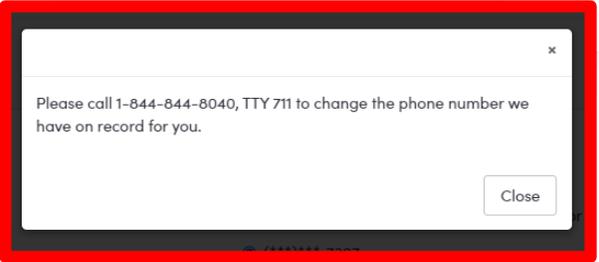
Multi-Factor Authentication
A Step – by – Step Guide to setting up your organization's profile in Pennie.
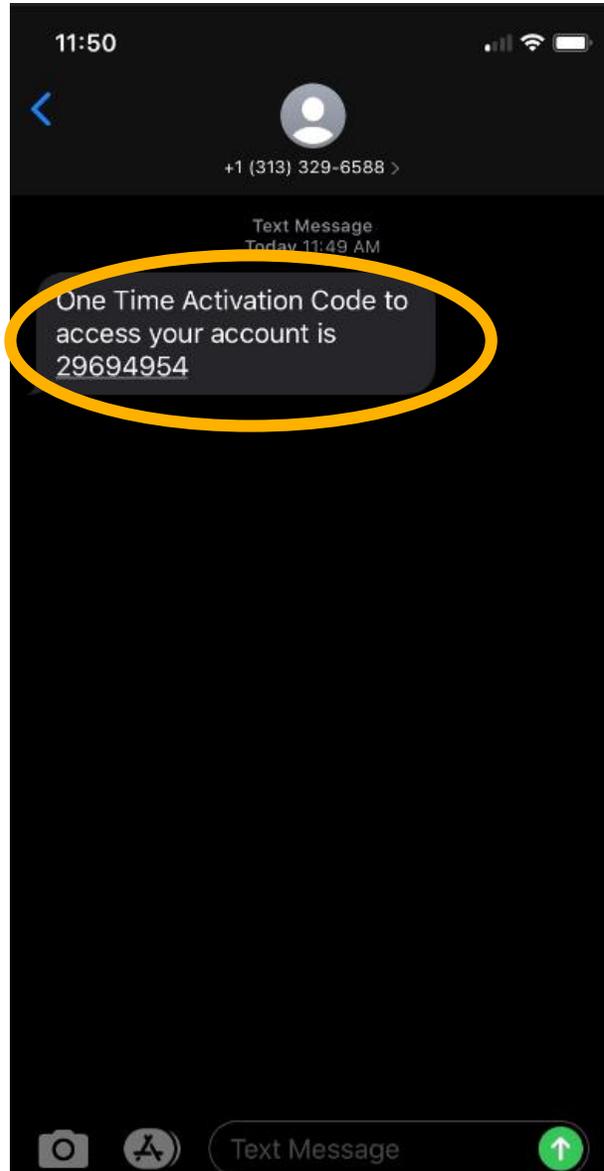
For the initial account claiming process, you will receive a text message or voice call to provide a Verification Code.

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

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

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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.

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

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.

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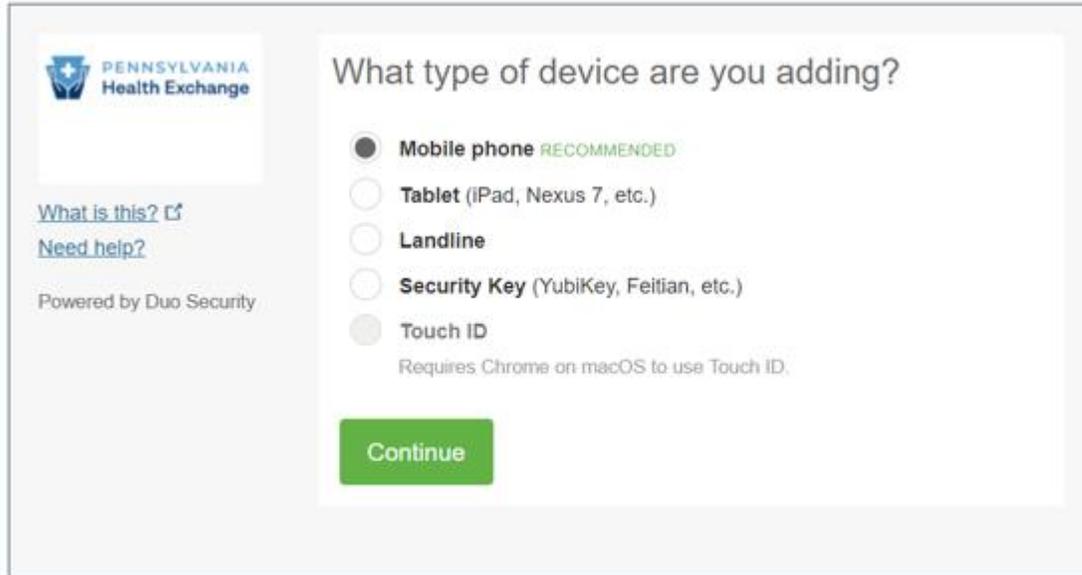
Why do we recommend a Mobile Phone or Tablet for Multi-Factor Authentication?

- **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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Log In   Help & Support ▾

PENNSYLVANIA
Health Exchange

What is this? ⤴
Need help?

Powered by Duo Security

Enter your phone number

United States ▾

+1 (717) 460-7307 ✔

Example: (201) 234-5678

☑ You entered **(717) 460-7307**. Is this the correct number?

Back   Continue

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

Multi-Factor Authentication
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Log In   Help & Support ▾

PENNSYLVANIA
Health Exchange

What type of phone is 717-460-7307?

◉ iPhone
○ Android
○ Windows Phone
○ Other (and cell phones)

What is this? ⤢
Need help?

Powered by Duo Security

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.

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Log In   Help & Support ▾
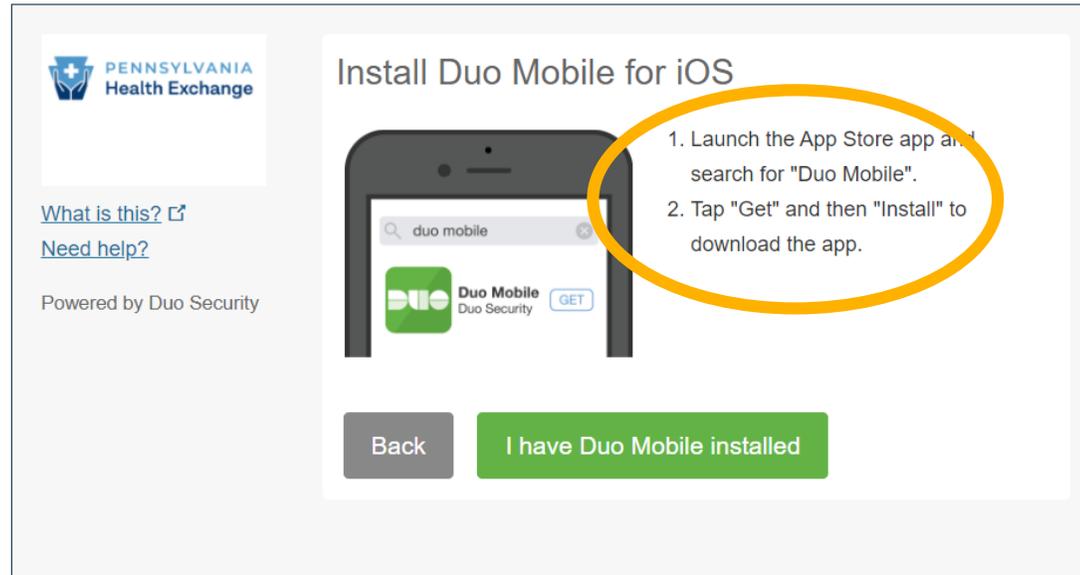
Download Duo Mobile app onto your mobile device.

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.
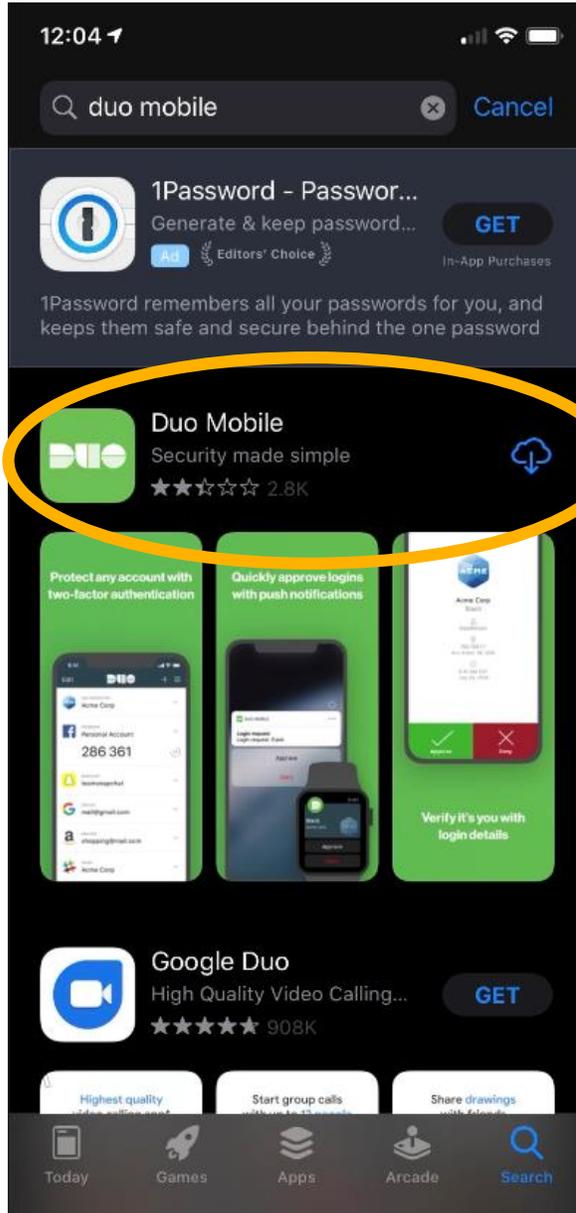
Visit the App Store

Download Duo Mobile app onto your mobile device.

When you have the app downloaded, click "I have Duo Mobile installed" to proceed.
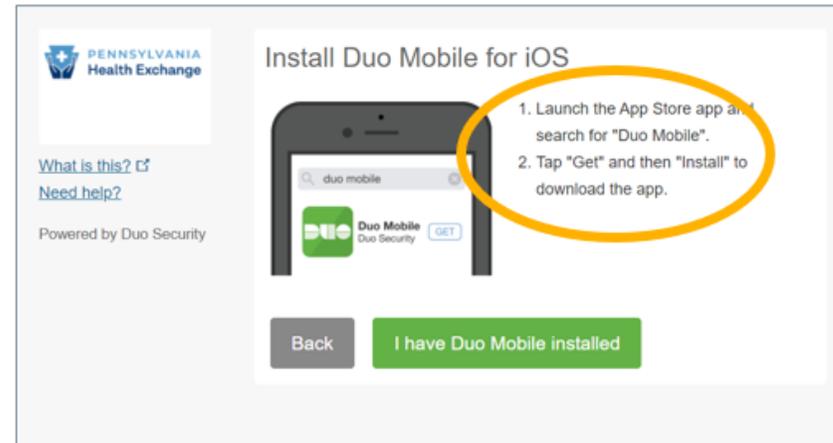
Multi-Factor Authentication
A Step – by – Step Guide to setting up your organization's profile in Pennie.

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Log In   Help & Support ▾

PENNSYLVANIA
Health Exchange

What is this? ⬀
Need help?

Powered by Duo Security

Activate Duo Mobile for iOS

1. Open Duo Mobile.
2. Tap the "+" button.
3. Scan this barcode.

Email me an activation link instead.
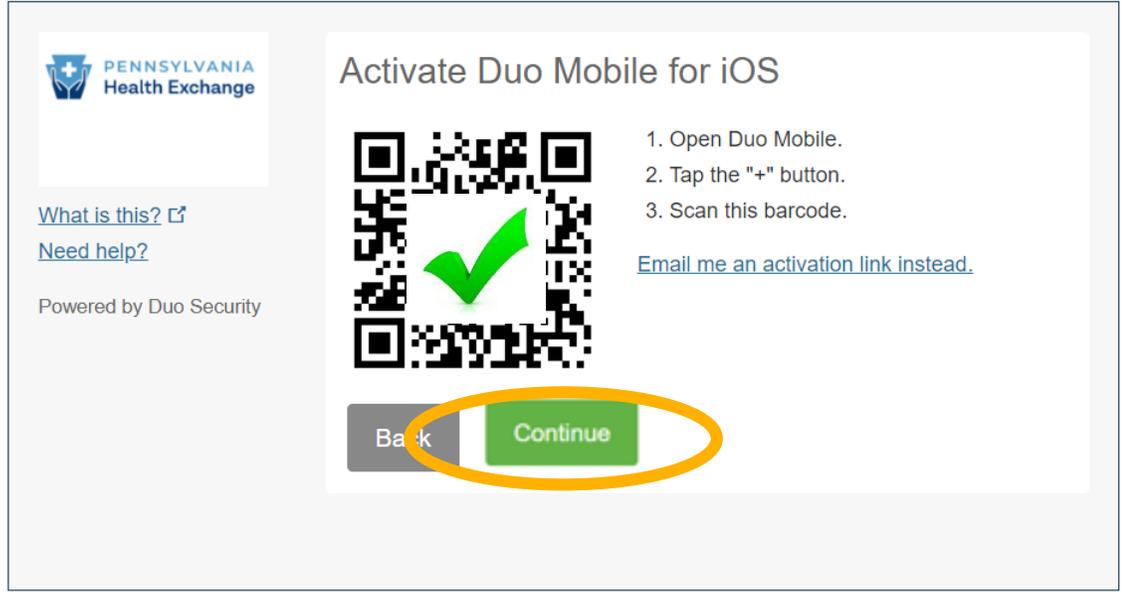
Back   Continue

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.

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Log In   Help & Support ▾

Log In

Email Address	Sam.Elliot@gmail.com
Password	•••••••••••••

☐ Remember Me

Log In

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.

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.

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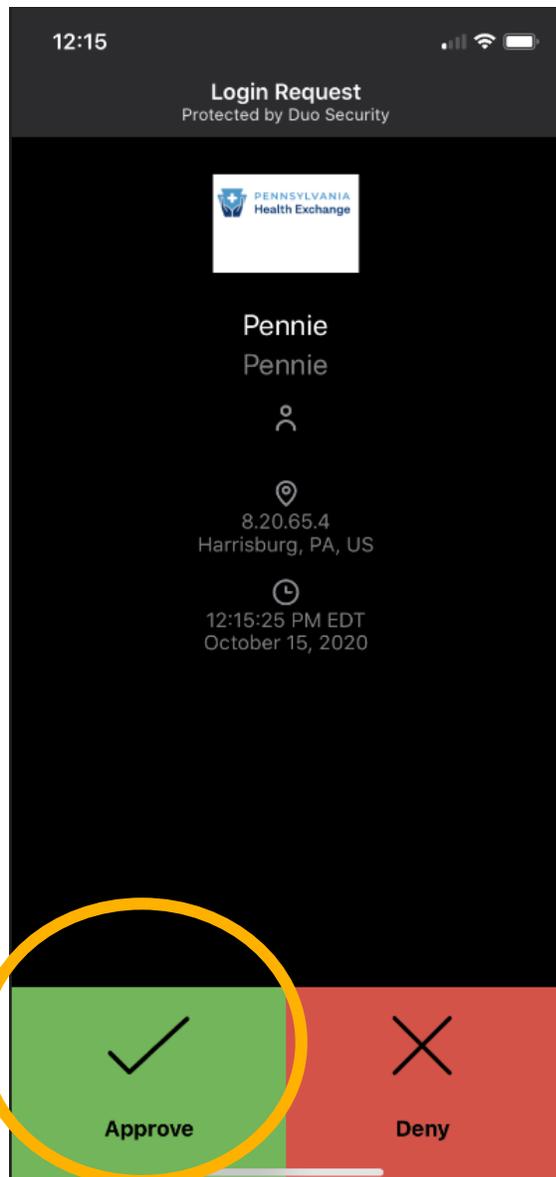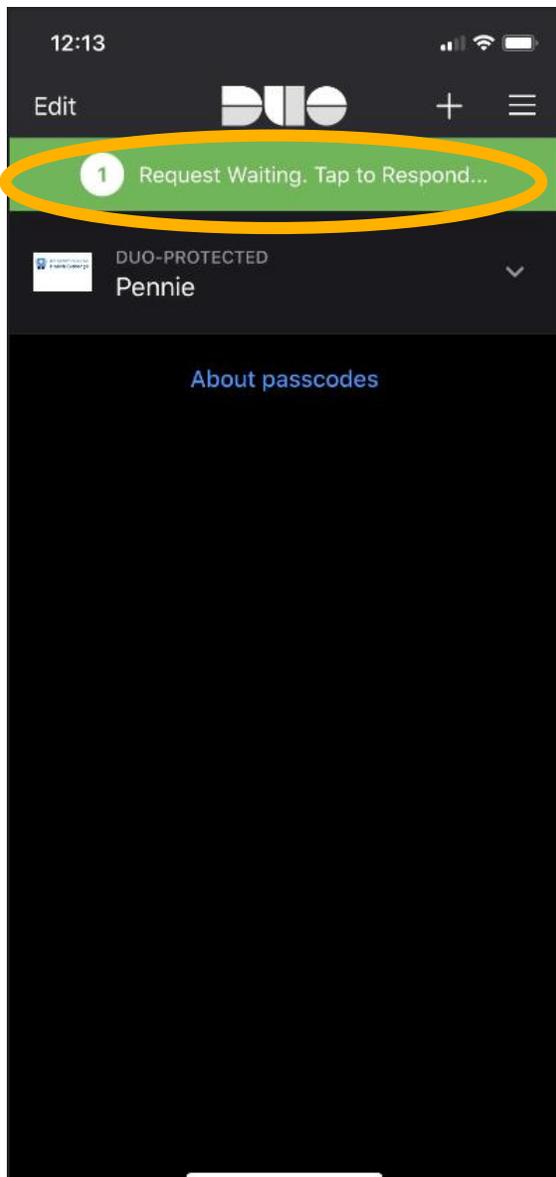
In the Duo Mobile App, you will see one push notification awaiting your verification.

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.
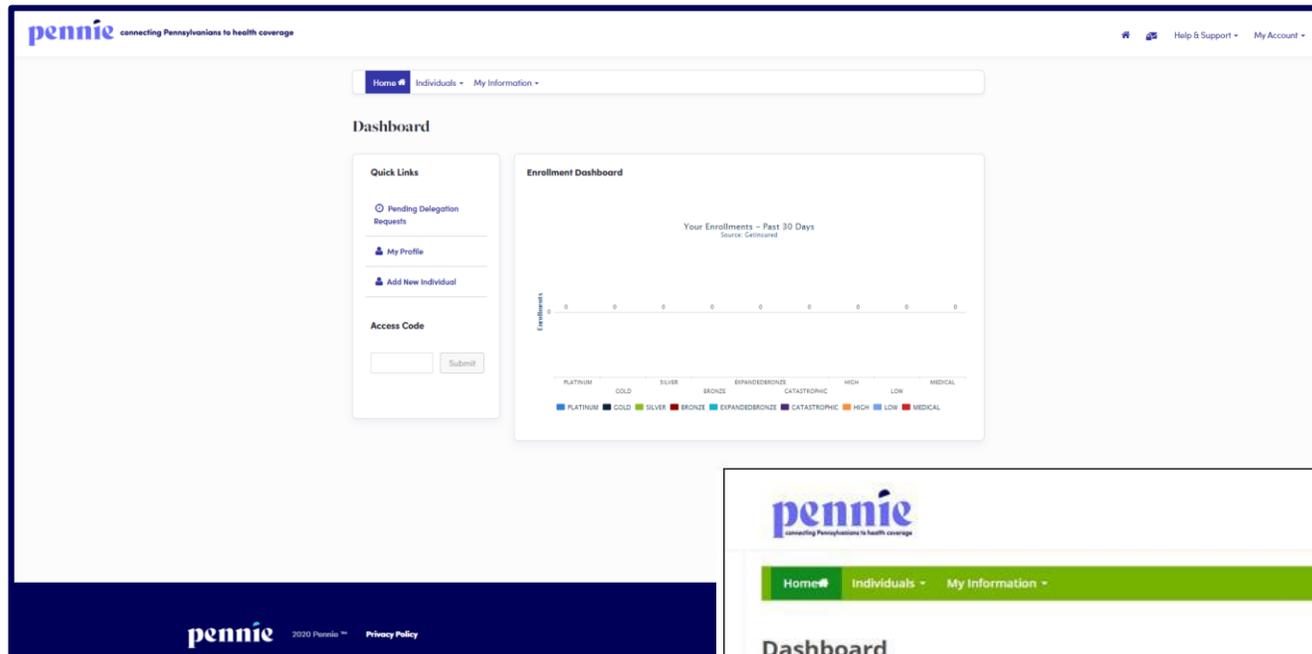
Depending upon your user role, you will now have secure access to the appropriate Dashboard for your user role.
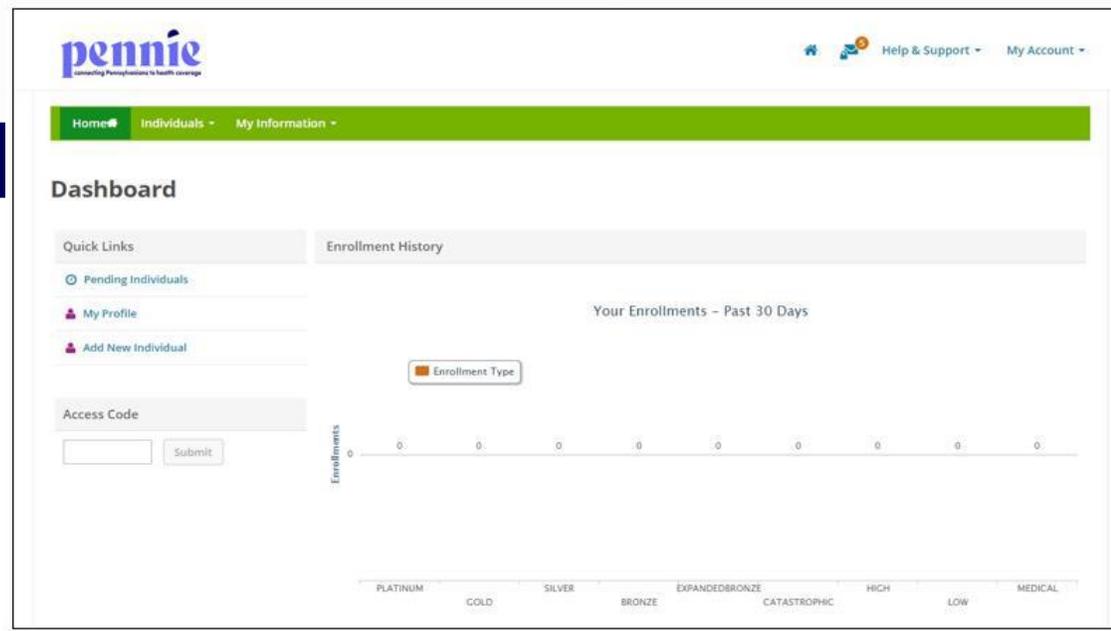
Multi-Factor Authentication
A Step – by – Step Guide to setting up your organization's profile in Pennie.
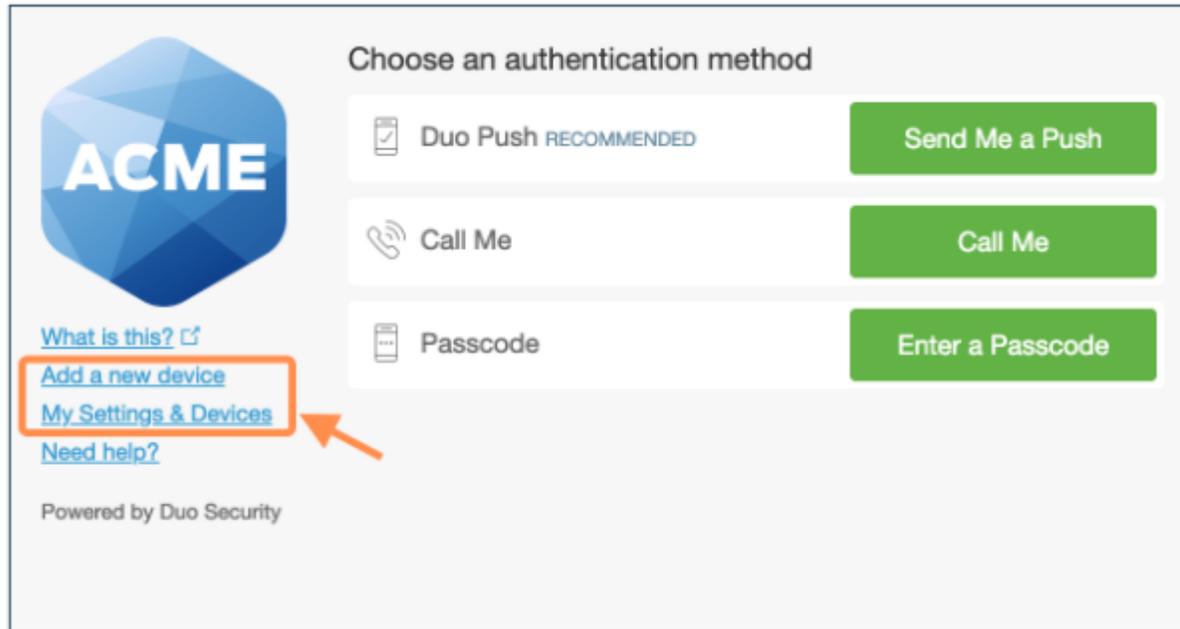
After passing primary authentication, users see Add a New Device and My Settings & Devices links on the Duo two-factor authentication page.

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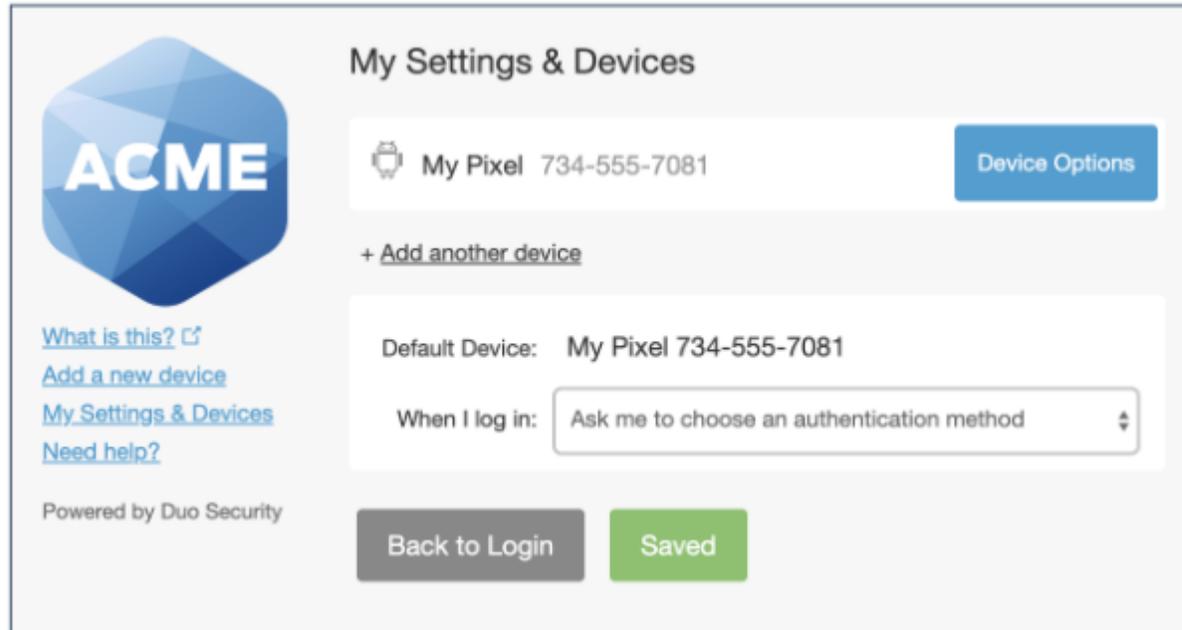
Users can quickly add another authentication device with the **Add a New Device** utility, while clicking **My Settings & Devices** prompts the user to complete two-factor authentication, then shows the device management portal.

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

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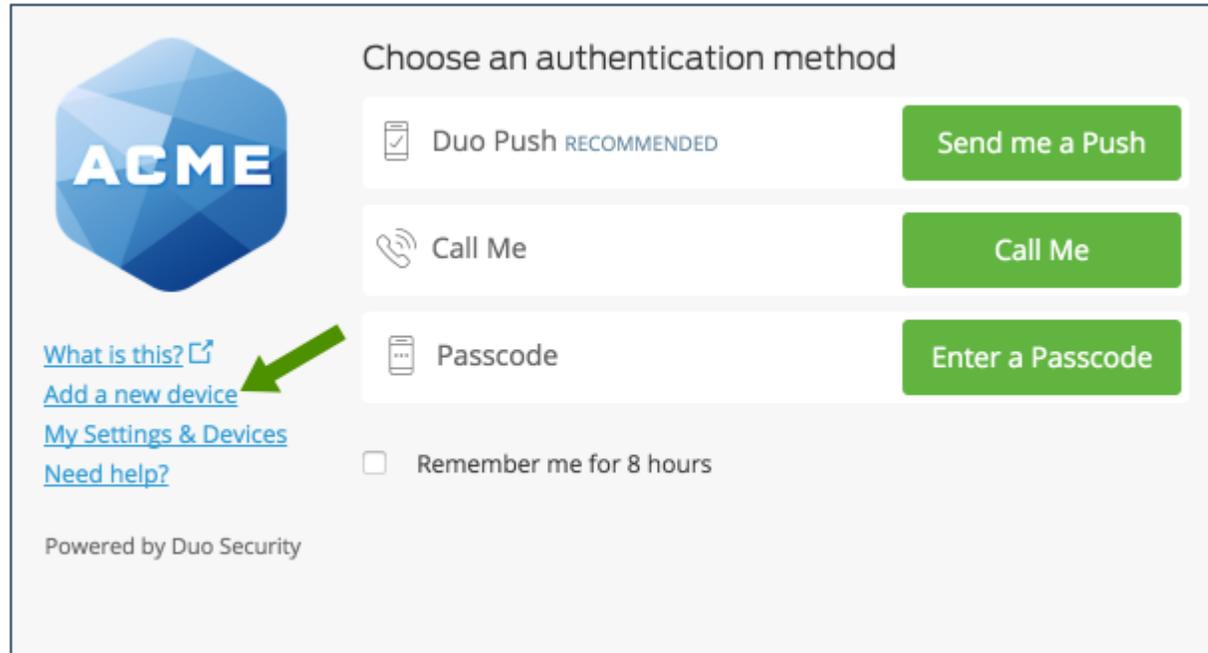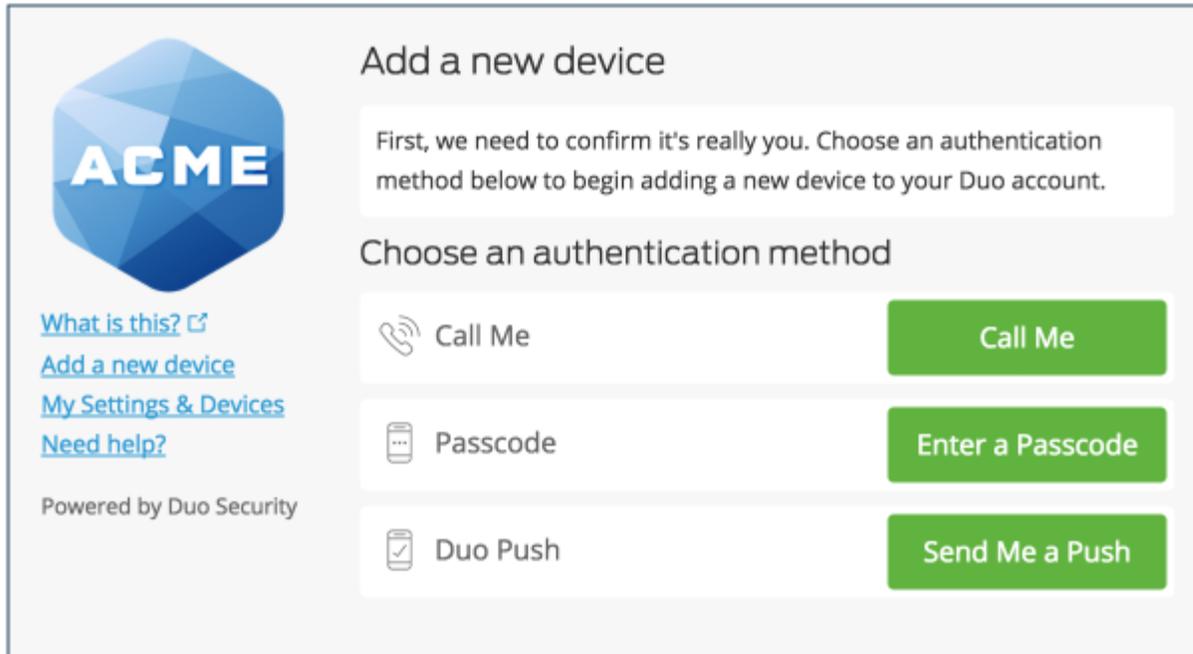
Choose an authentication method and complete two-factor authentication to begin adding your new device.

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.

Proceed with the device enrollment process.

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

Enter and confirm the second phone's number.
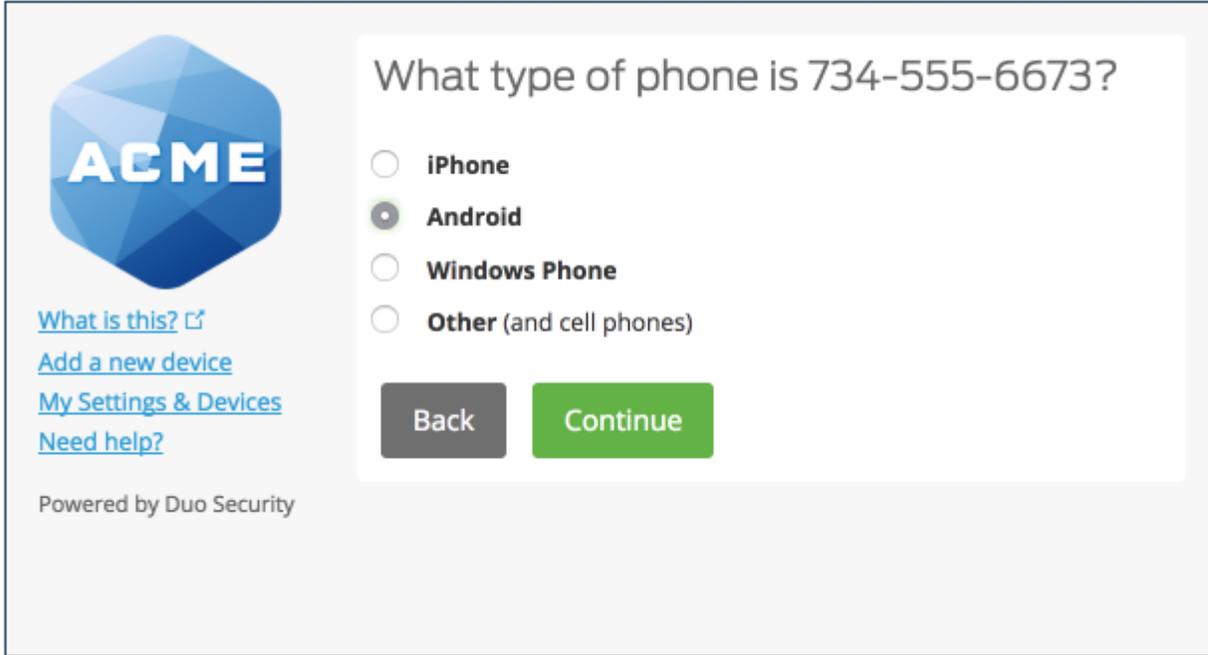
Multi-Factor Authentication
A Step – by – Step Guide to setting up your organization's profile in Pennie.

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.

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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.

Multi-Factor Authentication
A Step – by – Step Guide to setting up your organization's profile in Pennie.
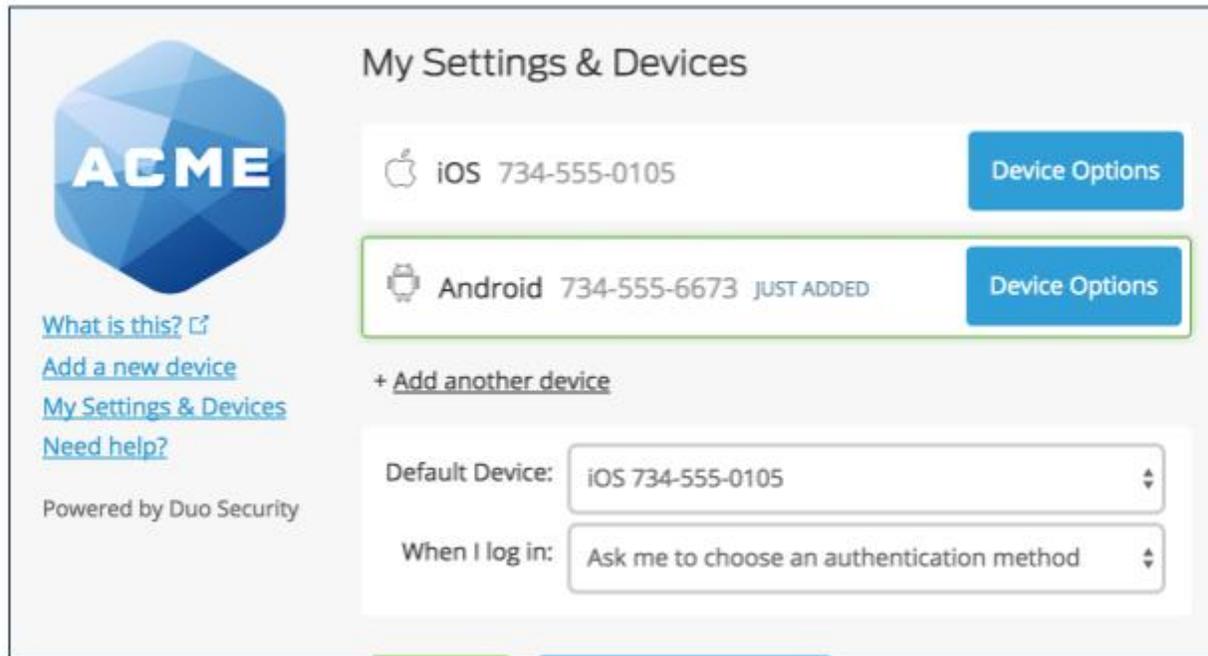
The new phone is added and listed with your other enrolled devices.

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
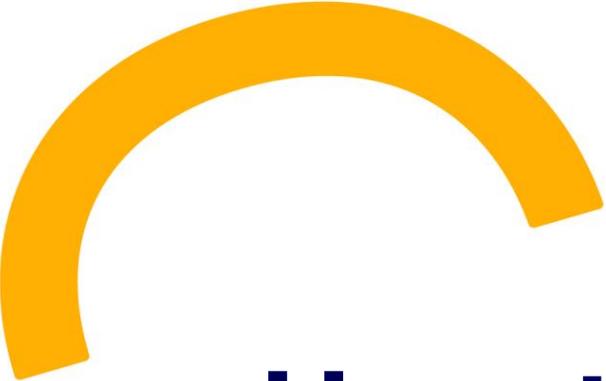
How to set up an Entity/Agency

Establishing Agency/Agency Manager Portal

Step – by – Step

Setting up your Agency/Agency Manager Portal

Step – by – Step

Setting up your Agency/Agency Manager Portal

Step – by – Step

Setting up your Agency/Agency Manager Portal

Enter the Name and Contact Information for the Organization's <u>Account Manager</u>.

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

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

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

Fill in the <u>PRIMARY SITE's</u> (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 easiser.

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

Step – by – Step

Setting up your Agency/Agency Manager Portal
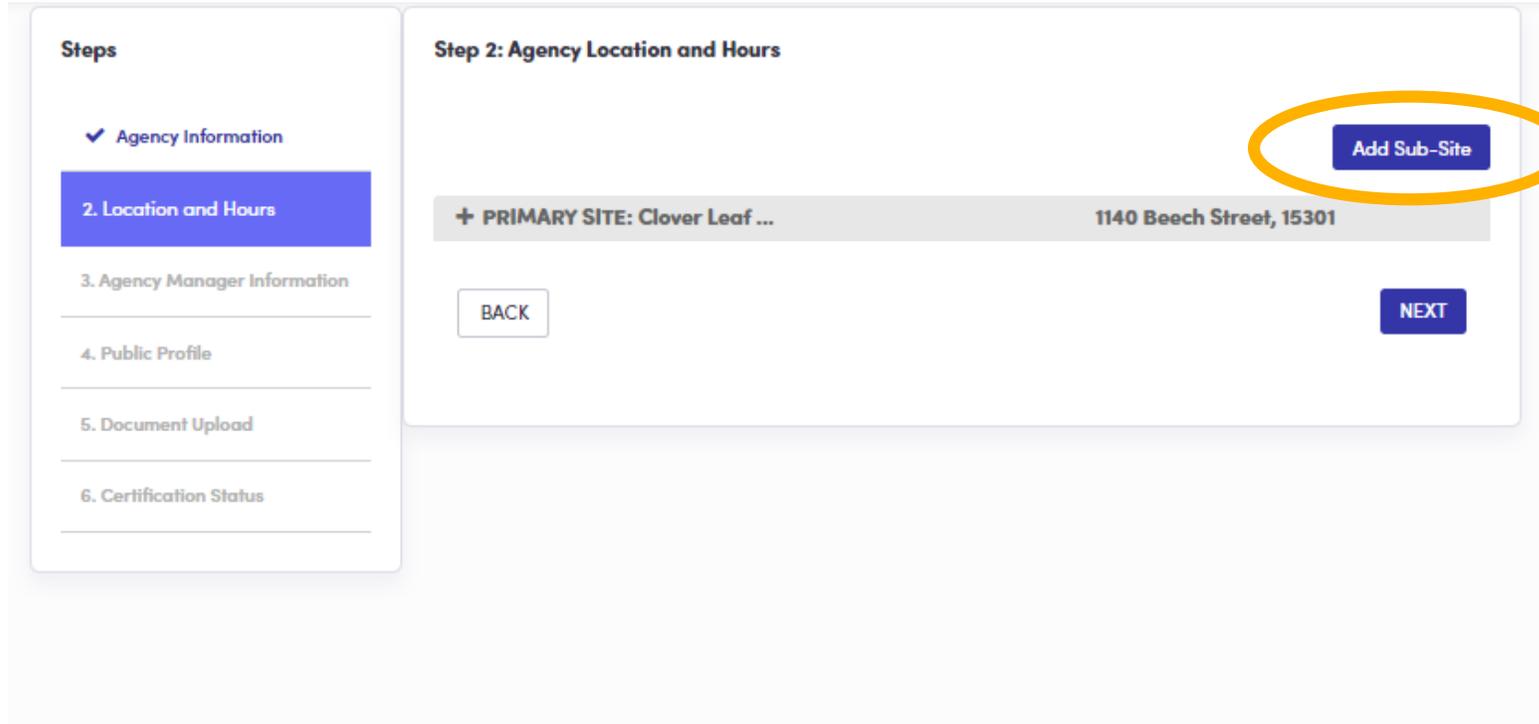
Steps

✔ 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

BACK   NEXT

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

Step – by – Step

Setting up your Agency/Agency Manager Portal

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

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 [Irish Gaelic ✕] [English ✕] [Spanish ✕]

Product Expertise ❓ ☑ Health
☑ Dental
☑ Vision
☑ Life
☑ Medicare
☐ Workers Compensation
☑ Property/Casualty

Your Website Address ❓ www.cloverleafins.com

Your Public Email ❓ patty.mcbride@yopmail.com

Education Graduated From High School ▾

About Me Confused? Come see us. We can help.

Upload Photo [Choose File] business woman.jpg [Upload]
You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

[Back]   [Next]

Select the information that you wish to have visible on the Agency's public profile in Pennie.
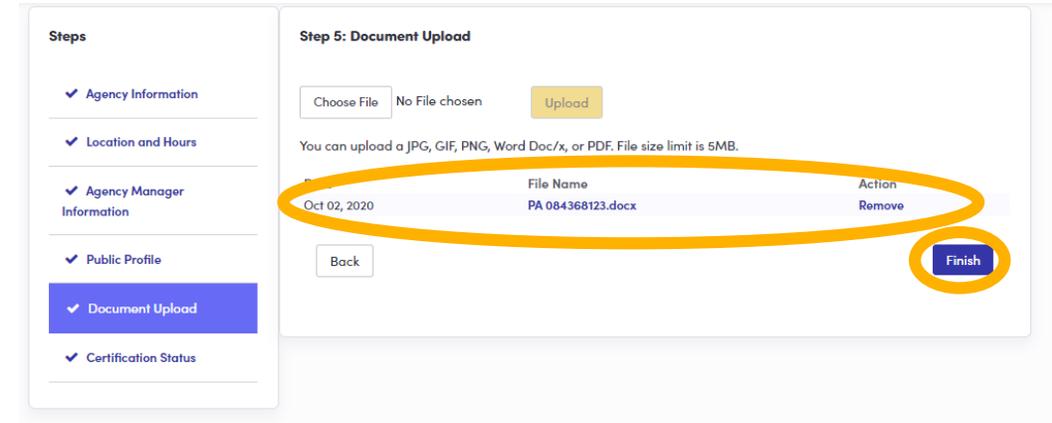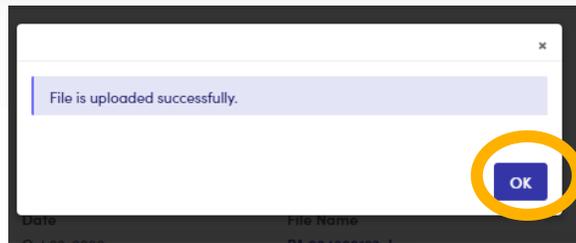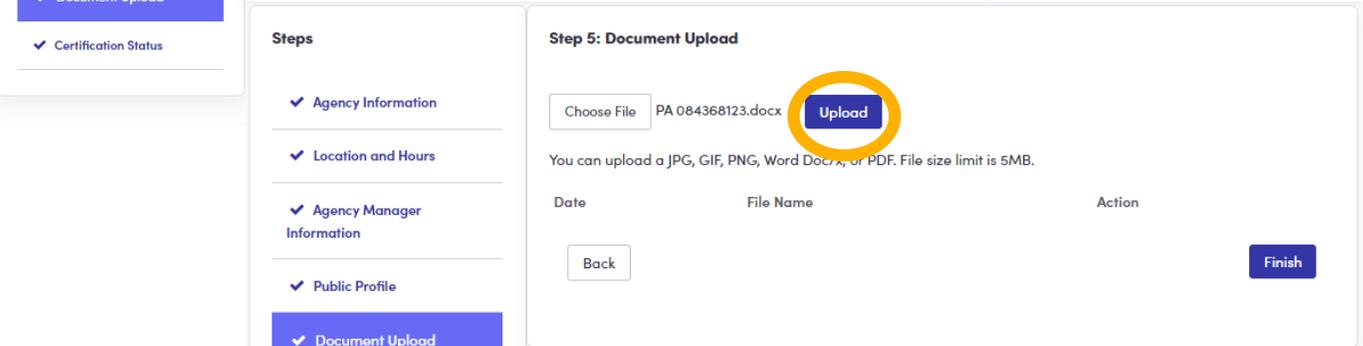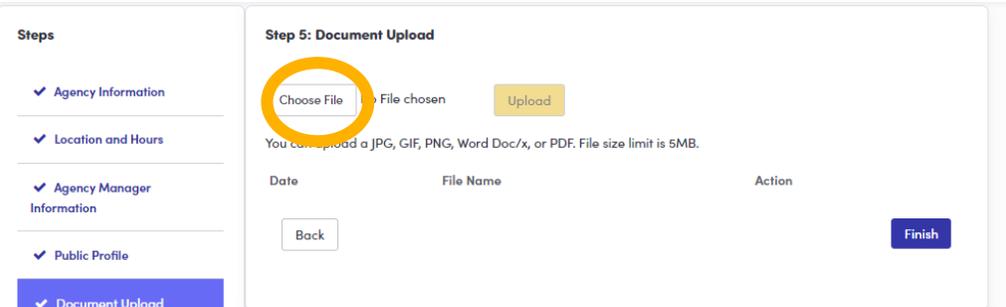
When complete, click "Next" to move on to document upload.

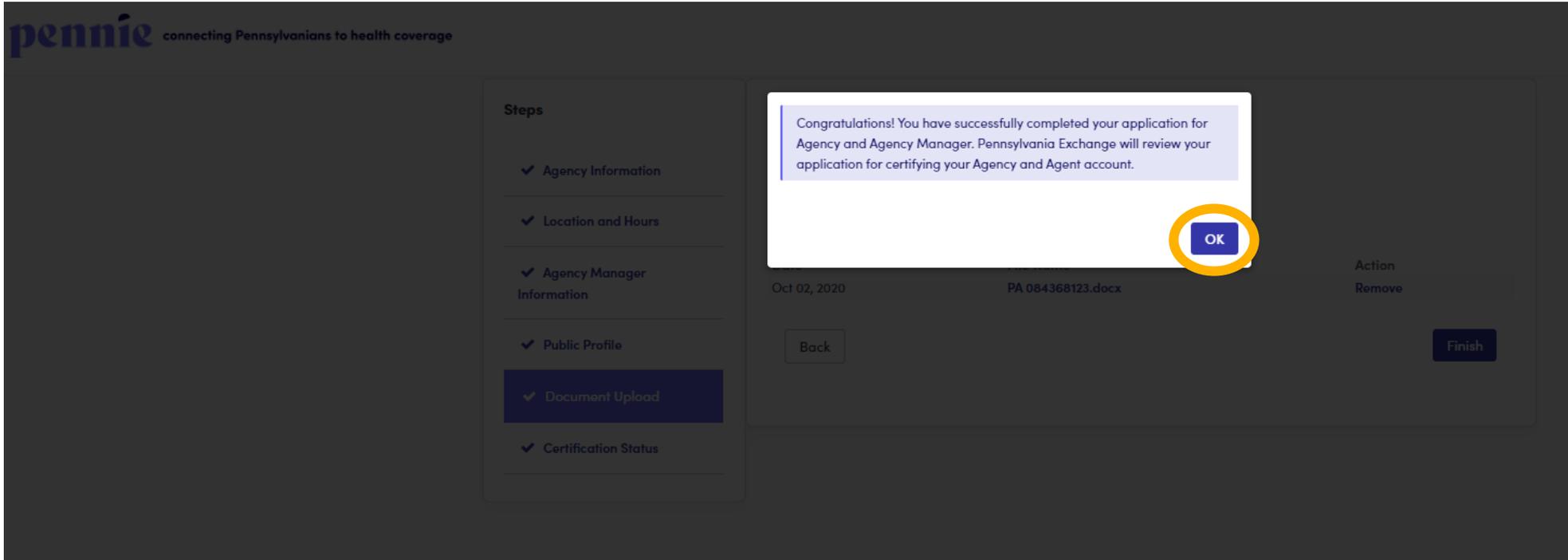# Step – by – Step

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 Manger Account set up.
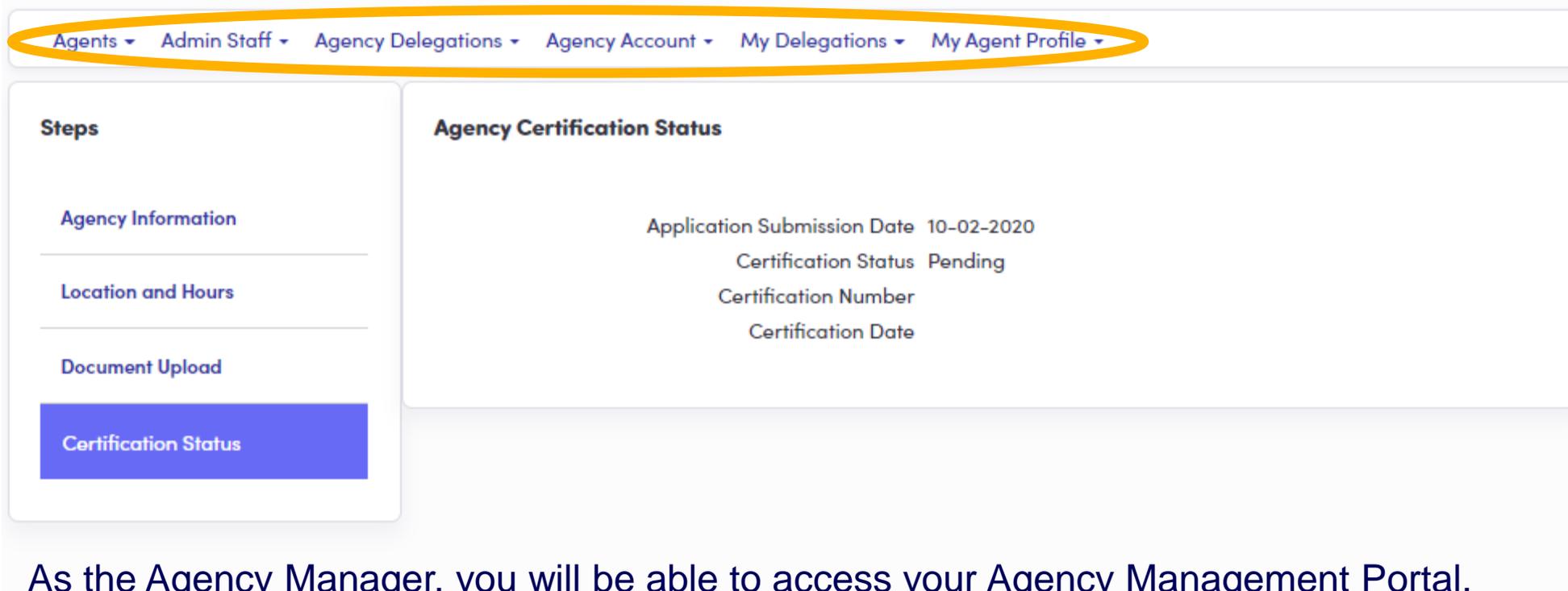
Setting up your Agency/Agency Manager Portal

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

Agents ▾   Admin Staff ▾   Agency Delegations ▾   Agency Account ▾   My Delegations ▾   My Agent Profile ▾

Steps

Agency Information

Location and Hours

Document Upload

Certification Status

Agency Certification Status

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 fuctionalities – 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

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 ...

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

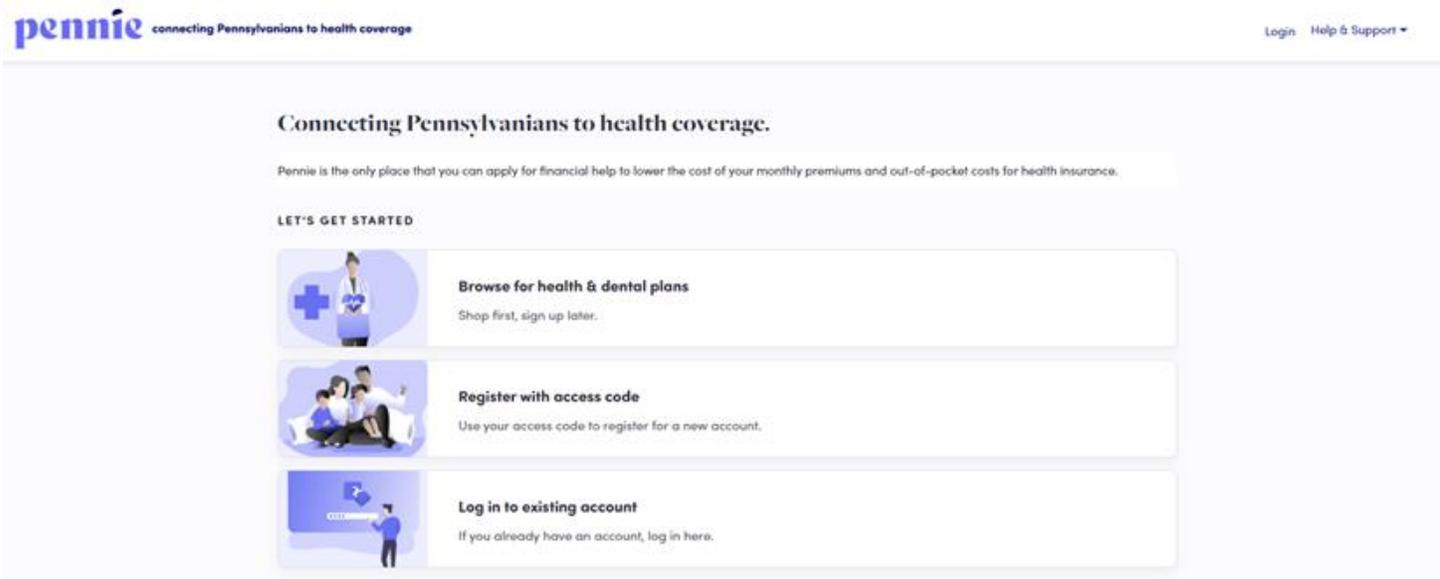# Step – by – Step

Setting up your Agency/Agency Manager Portal
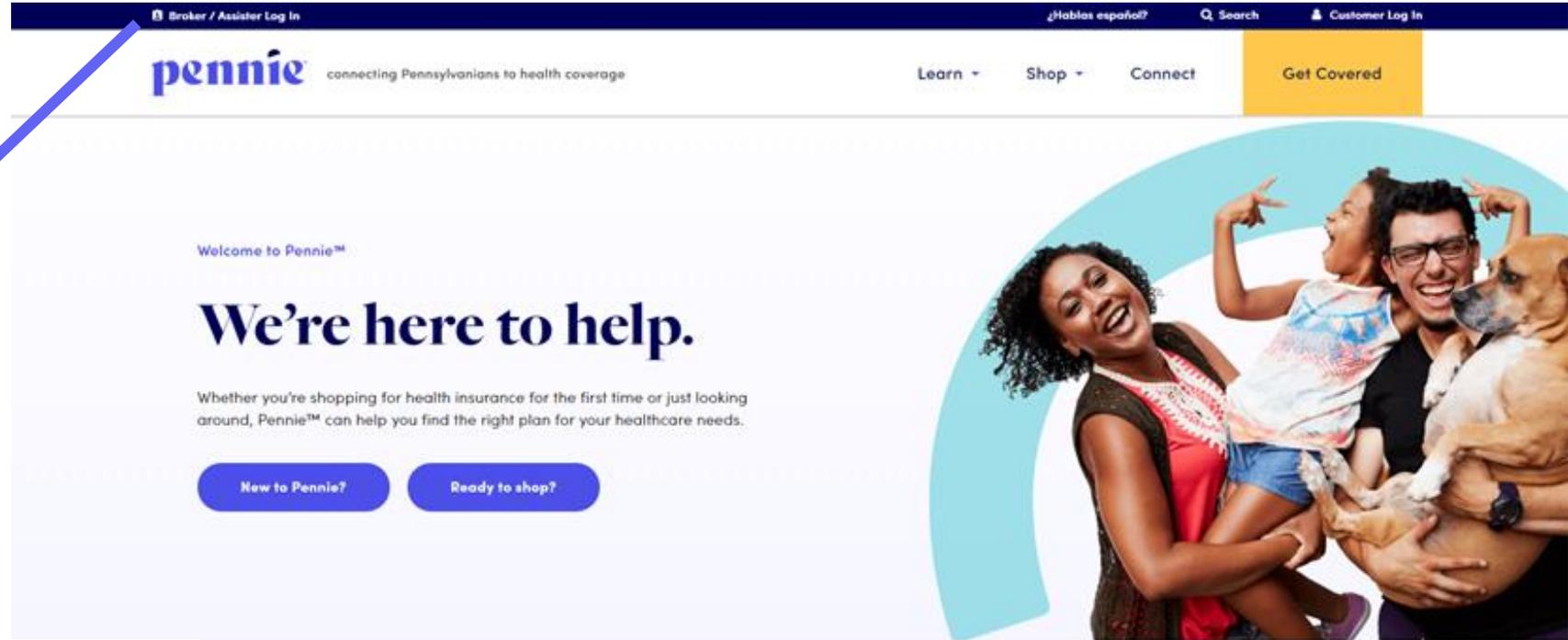
Step – by – Step

Setting up your Agency/Agency Manager Portal

Your Producer Profile

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

Click "Submit" to proceed.

Your Producer 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

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

Click "Next" to proceed.

Your Producer Profile

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

ADDRESS

312-318 Market Street,
Bowman Tower, Floor 3
Harrisburg,
Pennsylvania
17101

PHONE

+1 844-844-8040

WEB

pennie.com