



Pennsylvania State Based Exchange Platform

Assister User Reference Manual

09/18/2020

Version 1.0

Commonwealth of Pennsylvania

Pennsylvania Health Insurance Exchange Authority d/b/a Pennie

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1. Overview

This manual is intended to provide a detailed description of the functions available through the Certified Assister Portal of the Pennie Platform. Assisters refers collectively to the individual Navigators, PA Assisters, or CACs within an “Entity” organization who are certified by Pennie to offer enrollment assistance to Pennsylvania’s Affordable Care Act Exchange marketplace customers. Throughout this document, individual Navigators or Certified Application Counselors (CACs) are referred to as “Assisters,” per the definitions set forth in the [Navigator and Exchange Assister Accessibility and Regulation Act, act of Jun. 19, 2015, P.L. 25, No. 7, 40 P.S. §§ 4401 et seq.](#)

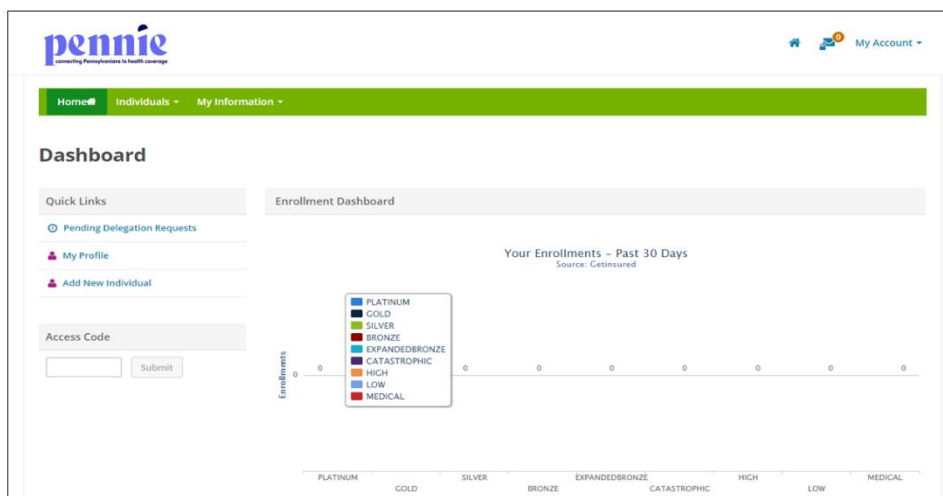
The Assister Portal is a complete solution for Pennie-certified Assisters to submit applications and enrollments and perform account maintenance transactions on behalf of existing customers, create new user accounts on behalf of new customers, and manage their book of business.

PLEASE NOTE: This manual is for Pennie-certified Assisters who have already completed Pennie Assister Training and Certification Curriculum and completed the user account registration process for the Pennie Platform. For information on training/certification and gaining access to the Pennie Platform please refer to the Pennie Entity and Assister Onboarding Guide.

2. Home Page



The Enrollment Dashboard is a landing page for the Assister portal. This page shows a count of the Assister enrollments for the past 30-days as distributed across the type of plans selected.

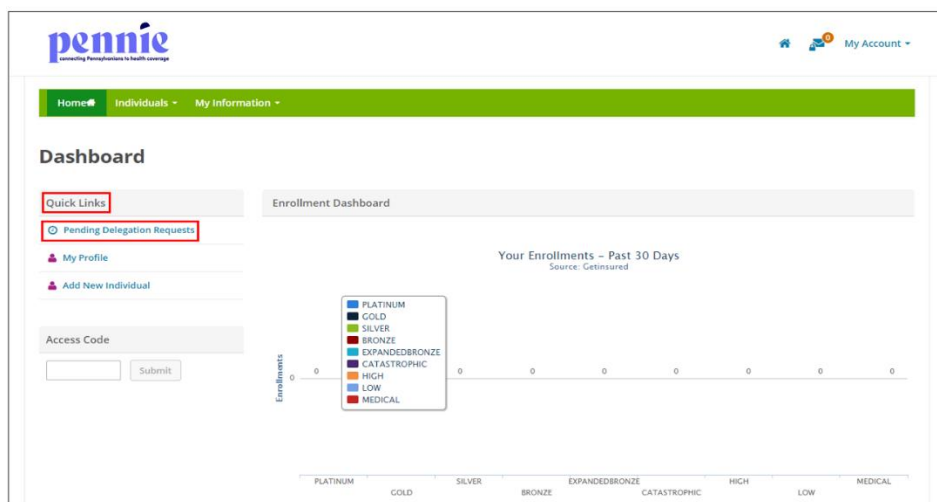


2.1 Pending Delegation Requests

The Pending Requests page displays a list of pending individuals that have requested Assister designation. The Assister has the option to accept or decline an individual's designation request. If a request is accepted, then the individual will move to the Active Individuals section. If the request is declined, the customer will automatically move to the Inactive Individual section. The Assister can view and search for the list of pending individuals filtered by their first name, last name, and request sent date.

2.1.1 View and search for pending designation requests

- Step-1: Go to 'Home Page' and click on 'Pending Delegation Requests' tab under "Quick Links" section.



- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range during which an individual sent the designation request in the 'Request Sent' section under the "Refine Results By" section and click on the 'Go' button.

Refine Results By (reset all)

First Name

Last Name

Request Sent

From: MM/DD/YYYY

To: MM/DD/YYYY

Go

Name	FAMILY SIZE	REQUEST SENT	ACTIONS
[Redacted]	N/A	08/05/2019	

N/A - Not Available

2.1.2 Accept or decline individual designation request

- Step-1: Go to 'Home Page' and click on 'Pending Delegation Requests' tab under "Quick Links" section.

Quick Links

Pending Delegation Requests

My Profile

Add New Individual

Access Code

Submit

Enrollment Dashboard

Your Enrollments - Past 30 Days
Source: Getinsured

Enrollments

PLATINUM GOLD SILVER BRONZE EXPANDED BRONZE CATASTROPHIC HIGH LOW MEDICAL

- Step-2: Click on and click on 'Accept' to accept an individual's delegation request or click on 'Decline' to decline the request.

Pending Delegation Requests 1 Pending Individual

Refine Results By	(reset all)	Name	FAMILY SIZE	REQUEST SENT	ACTIONS
First Name		[Redacted]	N/A	08/05/2019	<div> <div> Accept Decline </div> </div>

From: MM/DD/YYYY To: MM/DD/YYYY

Go

2.2 My Profile

The Profile section displays the Assister’s public profile information. This information will be displayed to customers who use Pennie’s “Find Local Assistance” directory tool. The Assister can update their profile information and mailing address within this section.

My Profile

Profile

Stump Creek
PA
15767

Phone Number

Email

Language Spoken English

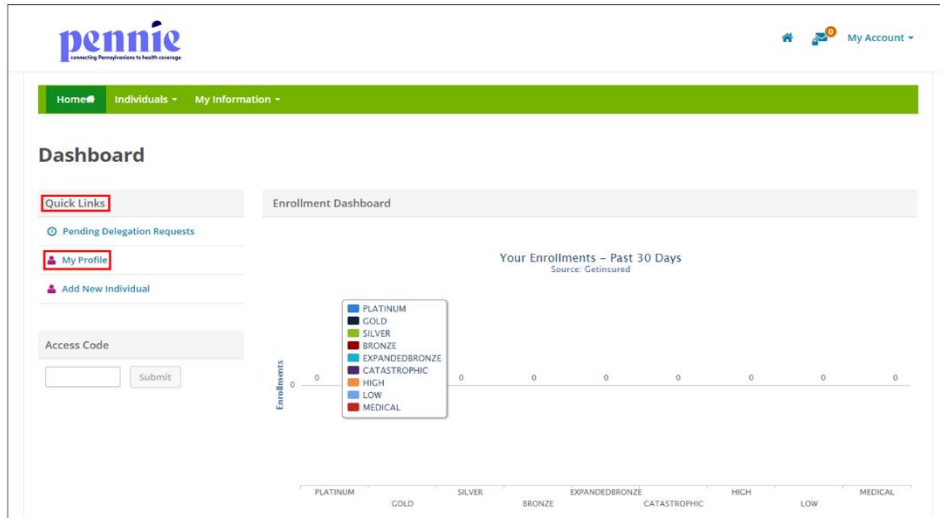
Language Written English

Education College Graduate

View larger map

2.2.1 Add or update Assister profile photo

- Step-1: Go to ‘Home Page’ and click on ‘My Profile’ tab under “Quick Links” section.



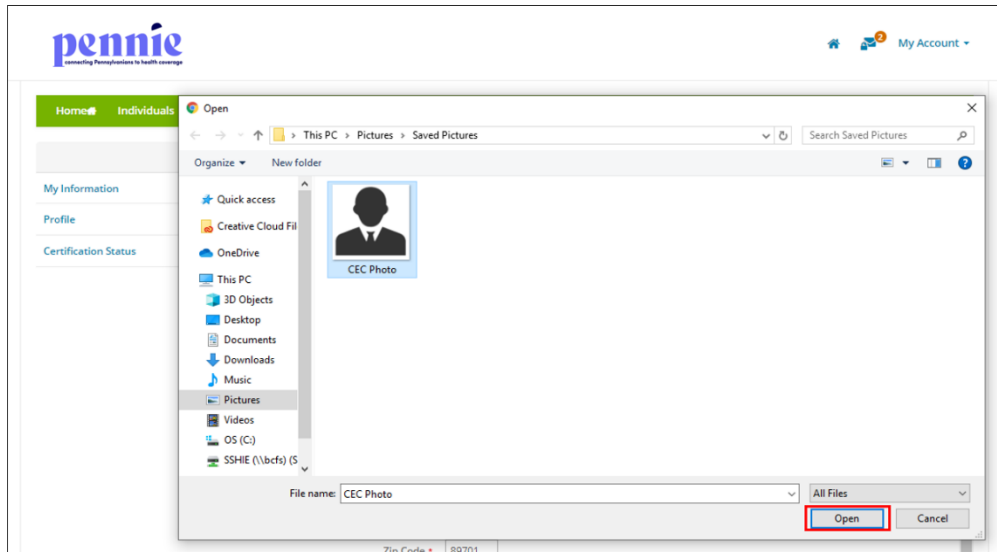
- Step-2: Click on the 'Edit' button.

The screenshot shows the Pennie Profile page. On the left, there are steps: 'Steps', 'My Information', 'Profile' (highlighted with a blue bar), and 'Certification Status'. The main area is titled 'Profile' and contains a profile card with a silhouette icon, a location pin for 'DuBois PA 15801', and fields for 'Phone Number', 'Email', 'Language Spoken' (English), 'Language Written' (English), and 'Education' (College Graduate). A map is shown on the right with a 'View larger map' link. The 'Edit' button is highlighted with a red box.

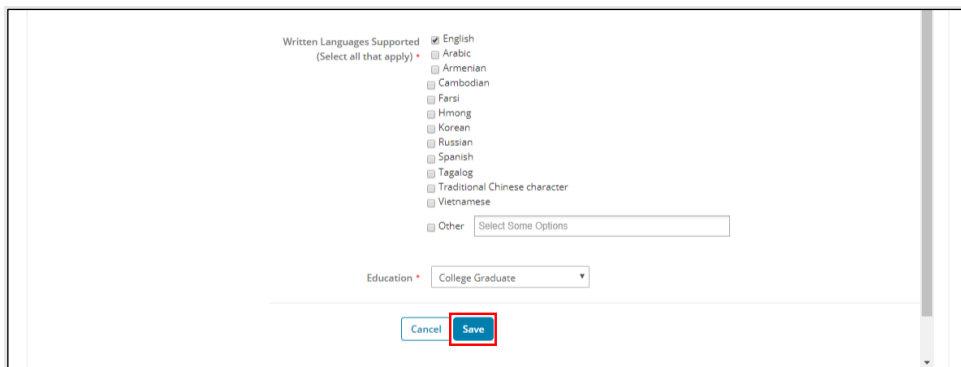
- Step-3: Click on 'Choose File'.

The screenshot shows the Pennie Assister Profile page. On the left, there are steps: 'My Information', 'Profile', and 'Certification Status'. The main area is titled 'Assister Profile' and contains an 'Upload Photo' section with a 'Choose File' button (highlighted with a red box) and a note 'no file chosen. File size limit is 5 MB.'. Below this are fields for 'First name' and 'Last name'.

- Step-4: A file browser opens. Navigate to the file on your computer of the photo that you wish to use and double click on the photo or select it and click on the 'Open' button.

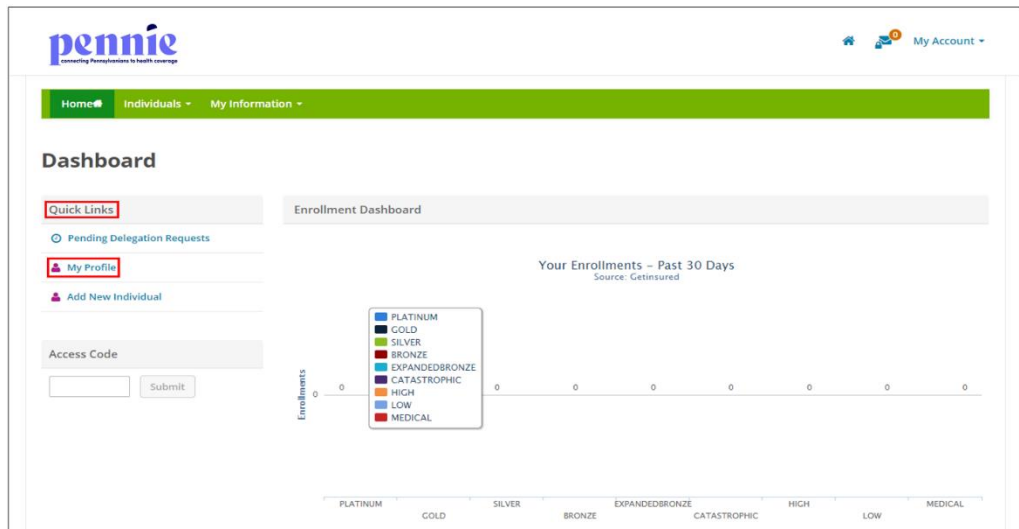


- Step-4: Click on the 'Save' button.

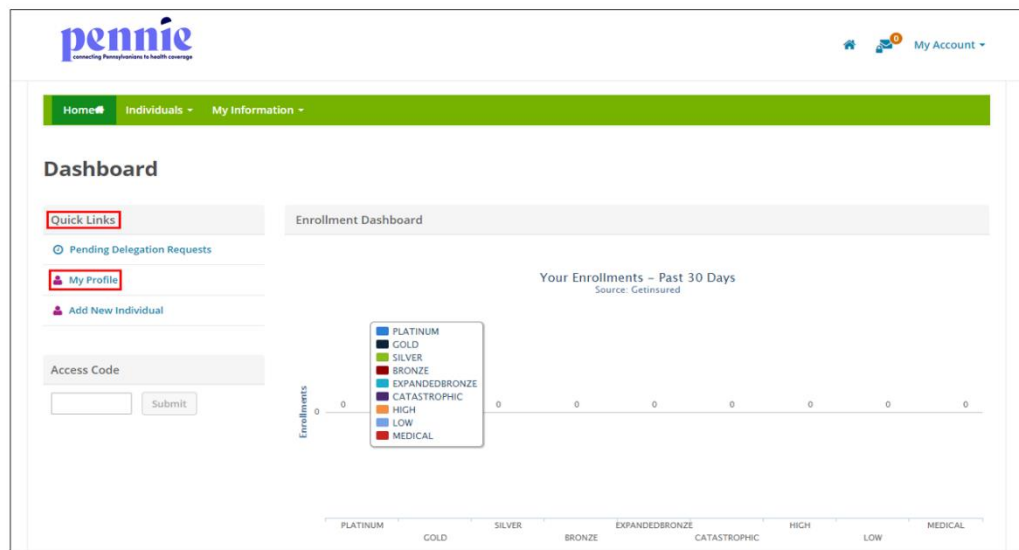


2.2.2 Add or update Assister profile information

- Step-1: Go to 'Home Page' and click on 'My Profile' tab under "Quick Links" section.



- Step-2: Click on the 'Edit' button.



- Step-3: Enter Assister's mailing address and profile information (e.g., "Spoken Languages Supported" or "Written Languages Supported") in the "Mailing Address" section and click on the 'Save' button.

Mailing Address

Street Address *

Suite
Apt, Suite, Unit, Bldg. Floor, etc

City *
DuBois

State *
PA

Zip Code *
15801

Phone number *

Email *

Spoken LanguagesSupported
(Select all that apply) *
☒ English
☐ Arabic
☐ Armenian
☐ Cambodian
☐ Cantonese
☐ Farsi
☐ Hmong
☐ Korean
☐ Mandarin
☐ Russian
☐ Spanish
☐ Tagalog
☐ Vietnamese
☐ Other
Select Some Options

Written Languages Supported
(Select all that apply) *
☒ English
☐ Arabic
☐ Armenian
☐ Cambodian
☐ Farsi
☐ Hmong
☐ Korean
☐ Russian
☐ Spanish
☐ Tagalog
☐ Traditional Chinese character
☐ Vietnamese
☐ Other
Select Some Options

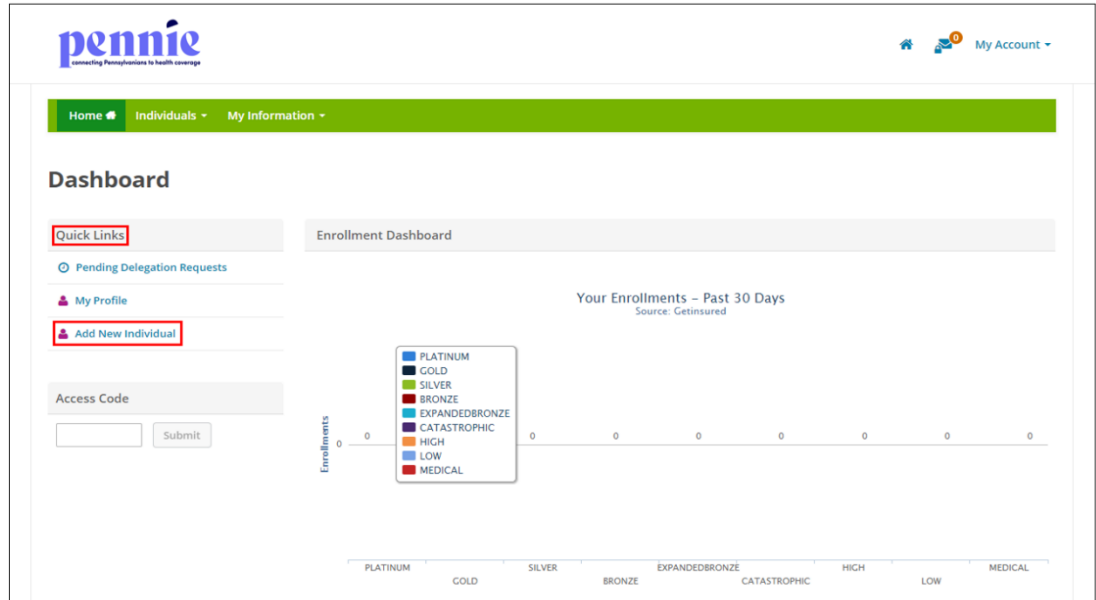
Education *
College Graduate

Cancel
Save

2.3 Add New Individual

The Assister can create a new customer account on behalf of a customer through the Add New Individual section. Once the new customer is added, the Assister can act as proxy to the customer account and perform activities on behalf of them. (To learn how to be a proxy to an individual account and further steps, please refer to Section 3.2.2.5)

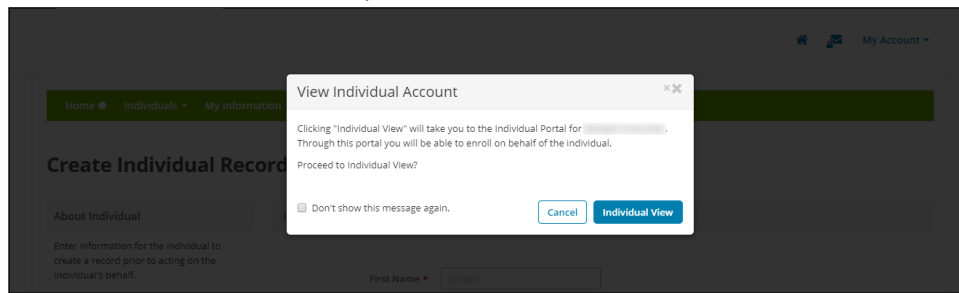
- Step-1: Go to 'Home Page' and click on 'Add New Individual' tab under "Quick Links" section.



- Step-2: Enter new customer's information (e.g., "First Name" or "Email Address") and click on the 'Start' button.

The screenshot shows the 'Create Individual Record' form. It has two tabs: 'About Individual' and 'Individual Information'. The 'Individual Information' tab is active. The form contains fields for: First Name, Last Name, Date Of Birth (with a calendar icon), Zip Code (pre-filled with 89701), Phone Number (three separate fields), and Email Address. Below these fields is a note: 'Note: If email is provided the new individual will be sent an email to activate a new account.' There are two radio buttons for 'SSN': 'SSN is required' and 'SSN is not required'. The 'SSN is not required' option is selected. A dropdown menu is open next to the 'SSN is not required' option, showing the following options: 'Select Reason', 'Religious Exception', 'Just Applied', 'Citizen Exception', and 'Other'. At the bottom of the form are 'Cancel' and 'Start' buttons.

- Step-3: A pop-up box will appear. Click on 'Individual View' to proxy a customer account or click on 'Cancel' to cancel the process.



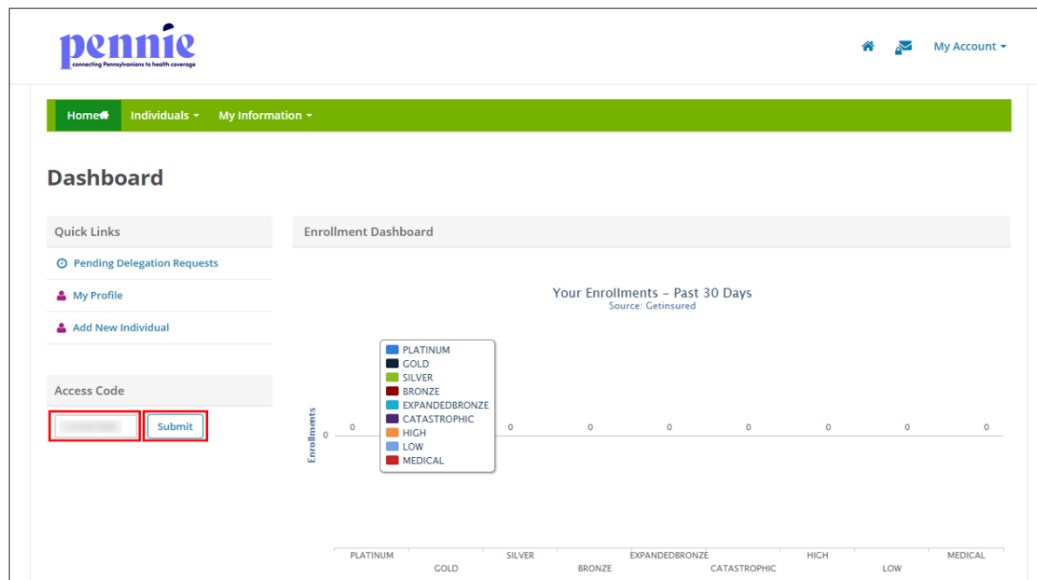
For detailed information on how to act as a proxy to an individual account please refer to Section 3.2.2.5.

2.4 Access Code

The Access Code section helps the Assister to create or claim a migrated customer user account on the Pennie platform. Customers whose accounts were migrated from HealthCare.gov to Pennie will receive an access code to claim their migrated account. Once an individual receives the Access Code from Pennie, the Assister may use this code to claim and act as a proxy on their account.

The Access Code functionality is not available until the Open Enrollment Period begins on November 1, 2020.

- Step-1: Go to 'Home Page' and enter the access code in the "Access Code" section and click on the 'Submit' button.



- Step-2: Enter customer information (e.g., "First Name" or "Date of Birth") to confirm their identity and click on the 'Submit' button.

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Home ▾ Individuals ▾ My Information ▾

Referral Linking

Process

Authentication Information

Link to Application

- Before we can link your application to your account, you will need to enter information to confirm your identity.
- Once you have successfully entered this information, you can view your eligibility results and shop for plans.

First Name *

Last Name *

Date of Birth *

Gender * ☐ Male ☒ Female

County *

Submit

- Step-3: Click on the 'Continue' button.

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Home ▾ Individuals ▾ My Information ▾

Referral Linking

Process

Link to Application

Authentication Information

Link to Application

This application has been successfully linked to your account.

Continue

- Step-4: A pop-box will appear. Click on 'Member View' to proxy a customer account or click on 'Cancel' to cancel the process.

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Home ▾ Individuals ▾ My Information ▾

Create Individual Record

About Individual

Enter information for the individual to create a record prior to acting on the individual's behalf.

First Name *

View Individual Account

Clicking "Individual View" will take you to the Individual Portal for . Through this portal you will be able to enroll on behalf of the individual.

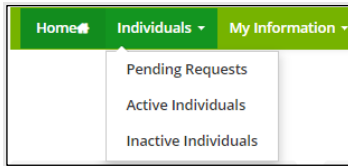
Proceed to Individual View?

☐ Don't show this message again.

Cancel **Individual View**

- For detailed information on how to act as proxy to an individual account please refer to Section 3.2.2.5.

3. Individuals



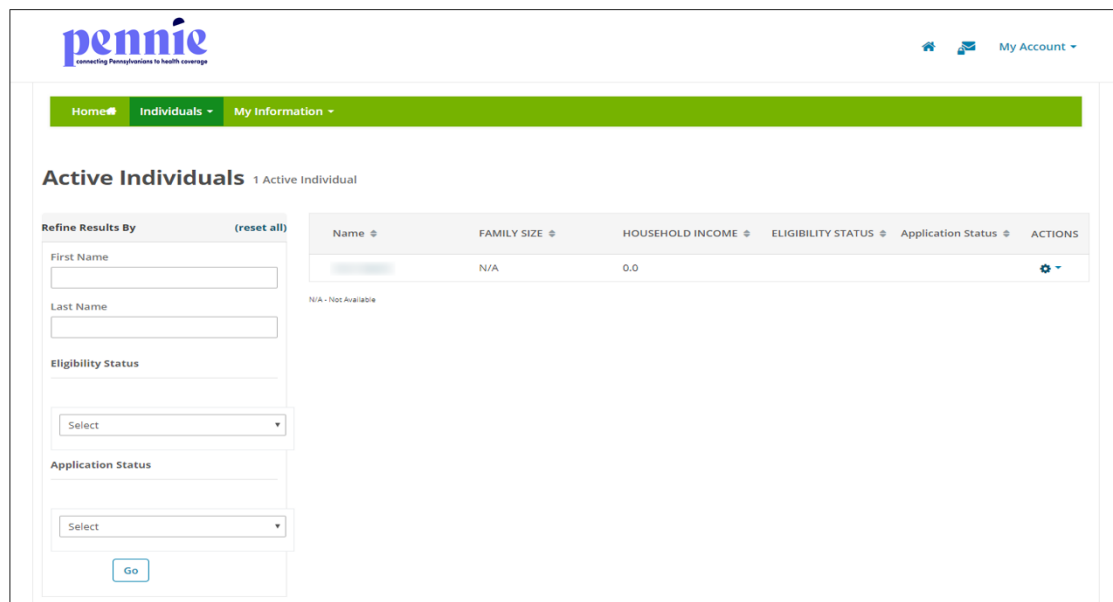
3.1 Pending Requests (New Designation Requests)

For detailed information on Pending Requests please refer to Section 2.1.

3.2 Active Individuals (Existing Designations)

An Active Individuals page displays a complete list of individuals assigned to the Assister. The Active Individuals list displays their name, family size, household income, eligibility status, application status, and an action button that helps the Assister in performing actions on an individual account.

The Active Individuals section helps the Assister to search for an active individuals list, edit individual summary, provide comments on an individual's profile, act as a proxy to a customer's application, resend the activation email to an individual, and mark an individual as inactive.



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Home Individuals My Information

Active Individuals

1 Active Individual

Refine Results By (reset all)

First Name

Last Name

Eligibility Status

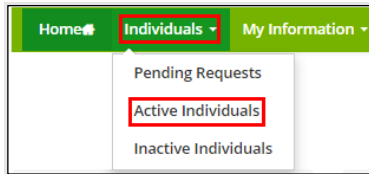
Application Status

Name	FAMILY SIZE	HOUSEHOLD INCOME	ELIGIBILITY STATUS	Application Status	ACTIONS
[REDACTED]	N/A	0.0			

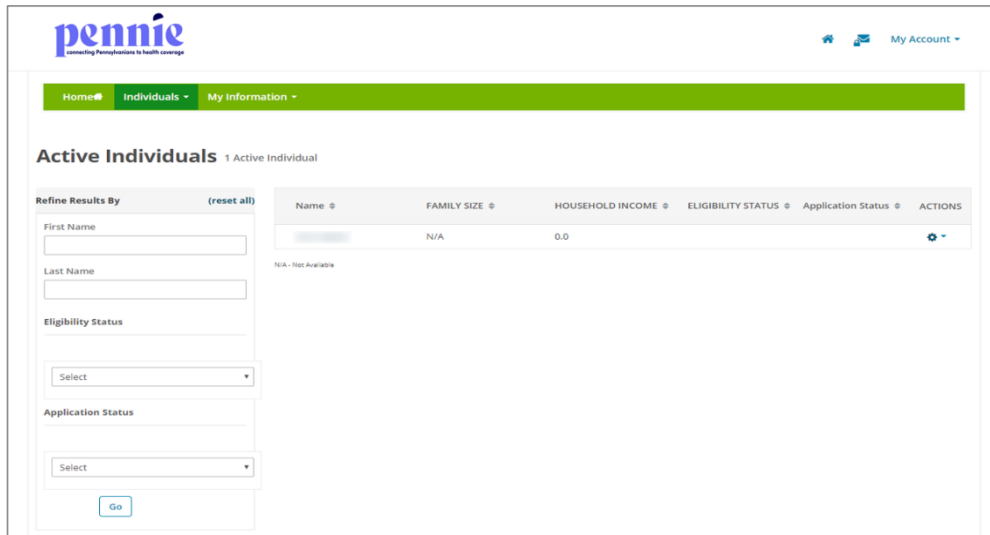
N/A - Not Available

3.2.1 View and search for active individuals

- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list and click on the 'Go' button.

A screenshot of the 'Active Individuals' search page. The page has a green header with 'pennie' logo and 'My Account' link. Below the header is a navigation bar with 'Home', 'Individuals', and 'My Information' tabs. The main content area is titled 'Active Individuals' and shows '1 Active Individual'. On the left, there are search filters: 'First Name', 'Last Name', 'Eligibility Status' (a dropdown menu), and 'Application Status' (a dropdown menu). A 'Go' button is at the bottom of the filters. On the right, there is a table with columns: 'Name', 'FAMILY SIZE', 'HOUSEHOLD INCOME', 'ELIGIBILITY STATUS', 'Application Status', and 'ACTIONS'. The table has one row with a blurred name, 'N/A' for family size, '0.0' for household income, and a gear icon in the actions column. Below the table, it says 'N/A - Not Available'.

3.2.2 Perform actions on a designated customer account


The Assister can perform actions on customer accounts, which includes each individual's summary, such as, provide comments on an individual's profile, act as a proxy to an individual account, resends the account activation email, and marks an individual as inactive.

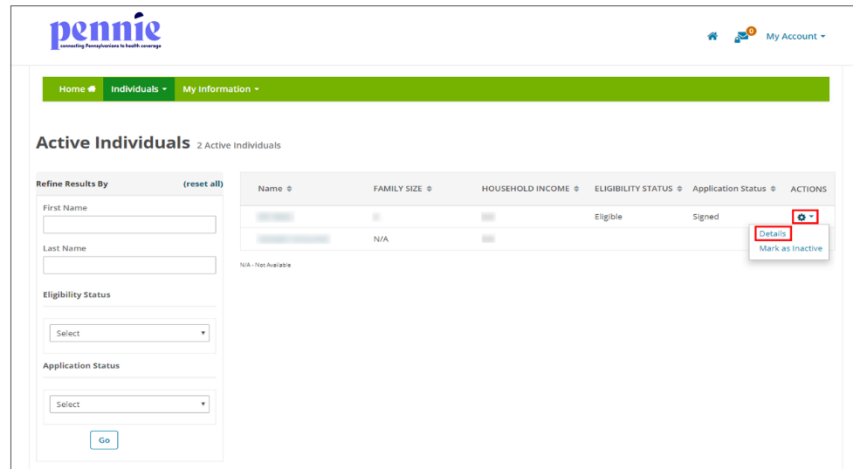
3.2.2.1 Update individual summary

PLEASE NOTE: Assisters can edit each summary only for the individuals who have not yet completed their sign-up process.

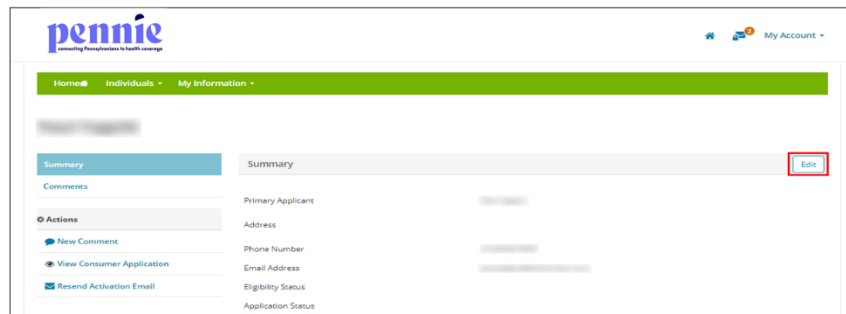
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



- Step-2: Click on the  button and click on 'Details'.



- Step-3: Go to "Summary" section and click on the 'Edit' button.

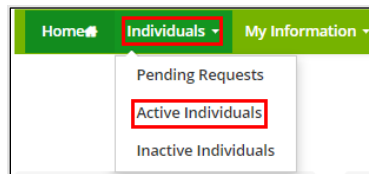


- Step-4: Enter the individual information and click on the 'Save' button.

The screenshot shows the Pennie web application interface. At the top, there's a navigation bar with 'Home', 'Individuals', and 'My Information' tabs. Below this, there's a 'Summary' section with a form containing fields for 'Primary Applicant', 'Email Address', and 'Primary Phone Number'. A 'Save' button is located at the top right of the form, highlighted with a red box. On the left side, there's a sidebar with 'Actions' including 'New Comment', 'View Consumer Application', and 'Resend Activation Email'.

3.2.2.2 Provide comments on an individual profile

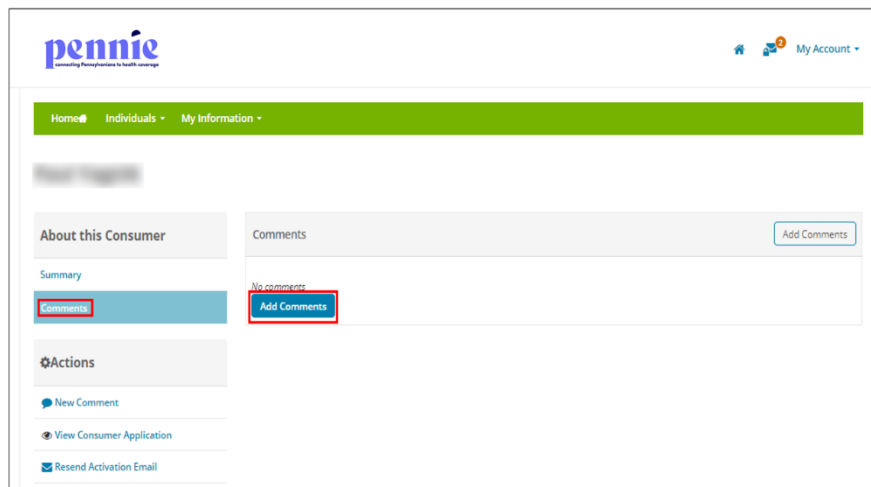
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



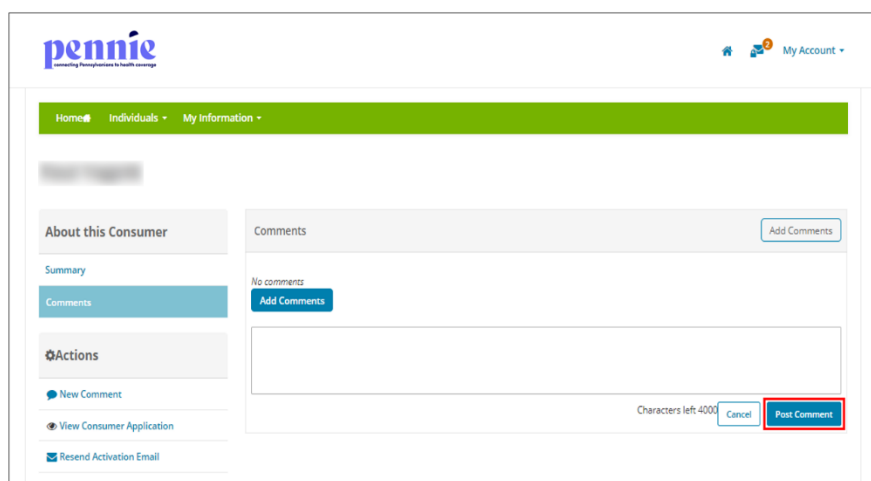
- Step-2: Click on the  button and click on 'Details'.

The screenshot shows the 'Active Individuals' section of the Pennie web application. On the left, there's a 'Refine Results By' sidebar with filters for 'First Name', 'Last Name', 'Eligibility Status', and 'Application Status'. The main area displays a table of active individuals. The table has columns: 'Name', 'FAMILY SIZE', 'HOUSEHOLD INCOME', 'ELIGIBILITY STATUS', 'Application Status', and 'ACTIONS'. One individual is listed with 'Eligible' status and 'Signed' application status. In the 'ACTIONS' column, there's a gear icon with a dropdown menu showing 'Details' (highlighted with a red box) and 'Mark as Inactive'.

- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



- Step-4: Provide comments in the text area and click on the ‘Post Comment’ button.



- Step-5 (Another way): Perform Step-1 and Step-2 from Section 3.2.2.2 and go to “Actions” section and click on the ‘New Comment’ button.

The screenshot shows the pennie web application interface. At the top, there's a navigation bar with 'Home', 'Individuals', and 'My Information'. Below this, there's a 'Summary' section with an 'Edit' button. To the left, under 'Actions', the 'New Comment' button is highlighted with a red box. Other buttons include 'View Consumer Application' and 'Resend Activation Email'. The main content area shows fields for 'Primary Applicant', 'Address', 'Phone Number', 'Email Address', 'Eligibility Status', and 'Application Status'.

- Step-6 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.


3.2.2.3 Update comments on an individual profile

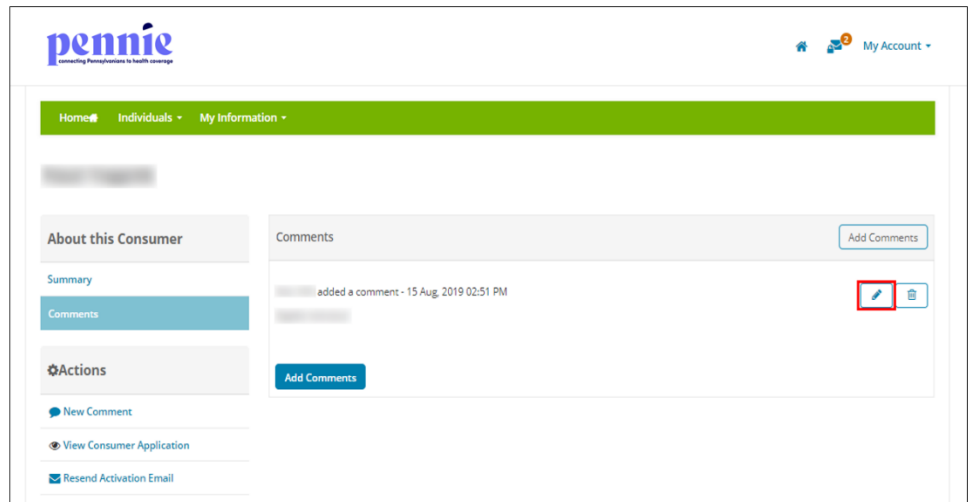
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

The screenshot shows the 'Individuals' dropdown menu in the pennie web application. The 'Active Individuals' option is highlighted with a red box. Other options include 'Pending Requests' and 'Inactive Individuals'.

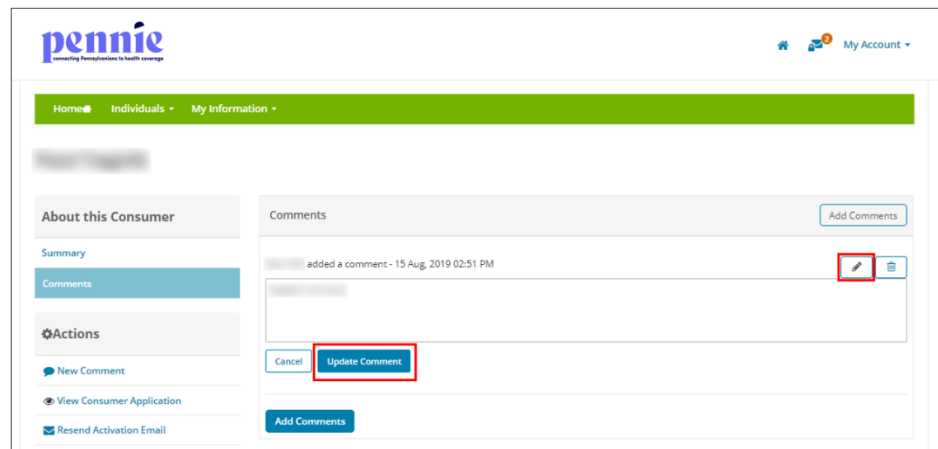
- Step-2: Click on the  button and click on 'Details'.

The screenshot shows the 'Active Individuals' page in the pennie web application. On the left, there's a 'Refine Results By' section with filters for 'First Name', 'Last Name', 'Eligibility Status', and 'Application Status'. The main table lists individuals with columns for 'Name', 'FAMILY SIZE', 'HOUSEHOLD INCOME', 'ELIGIBILITY STATUS', 'Application Status', and 'ACTIONS'. In the 'ACTIONS' column, the 'Details' button is highlighted with a red box. Below the table, there's a 'Go' button.

- Step-3: Go to “Comments” section and click on the  button next to a comment.



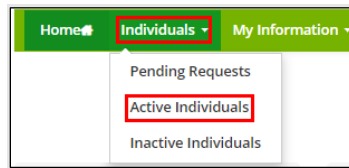
- Step-5: Enter the updated comment in the text area and click on the 'Update Comment' button.




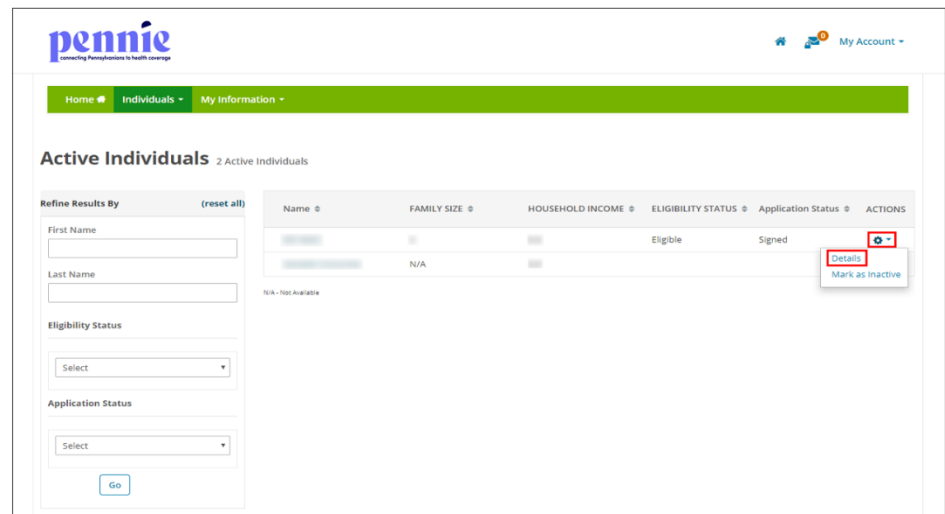
3.2.2.4 View customer application

The Assister can view an individual customer's account and can perform actions on their behalf when a proxy relationship is established. They can perform actions such as report qualifying life events, shop for new health and dental plans, start a new individual application, view application status, view household eligibility, view current health and dental plans, view current and past enrollments, check inbox messages, update communication preferences, use find local assistance tool, view Assister profile, and de-designate an Assister.

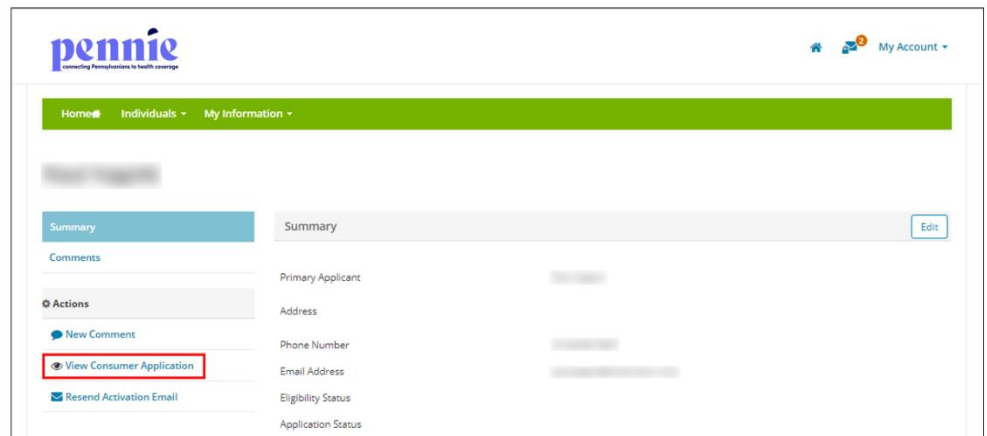
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



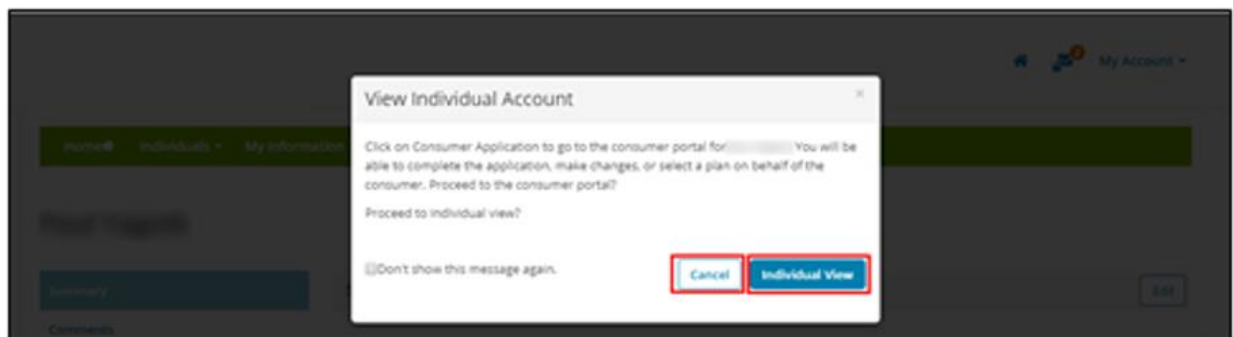
- Step-2: Click on the  button and click on 'Details'.



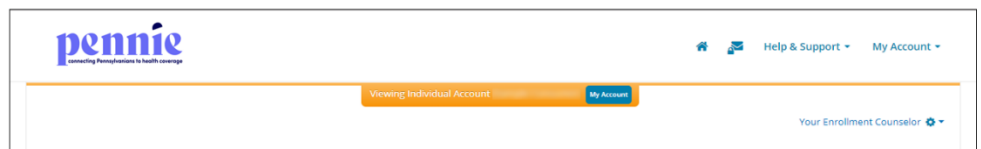
- Step-3: Go to “Actions” section and click on ‘View Customer Application’.



- Step-4: A pop-up box will appear. Click on ‘Individual View’ to proxy an individual account or click on ‘Cancel’ to cancel the process.



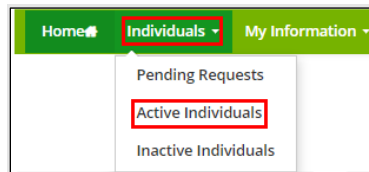
- Step-5: The following screen displays customer account.



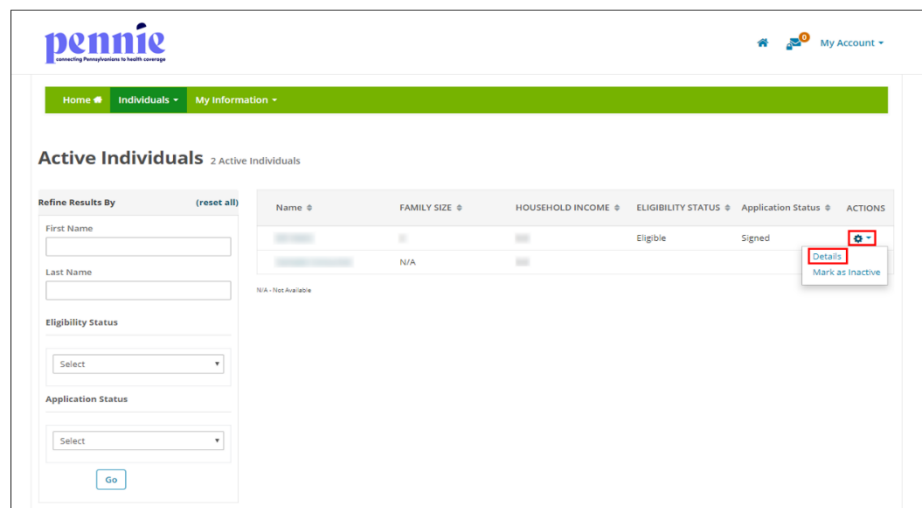
3.2.2.5 Resend activation email

PLEASE NOTE: The Resend Activation Email feature is only available for customers who have not completed the sign-up process. This step will allow Assisters to edit the individual email address and phone number before resending the activation link.

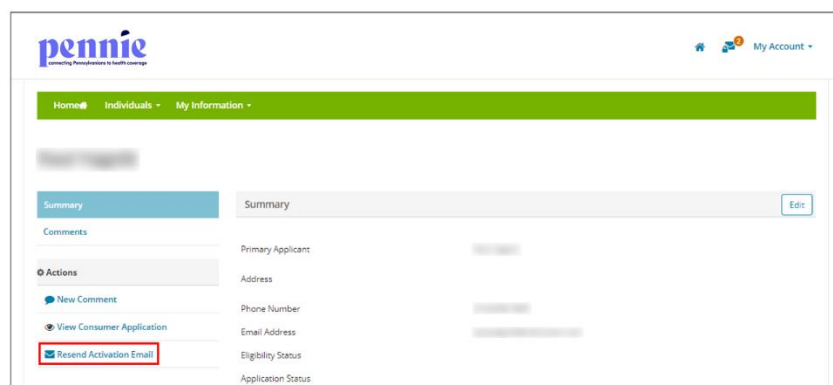
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



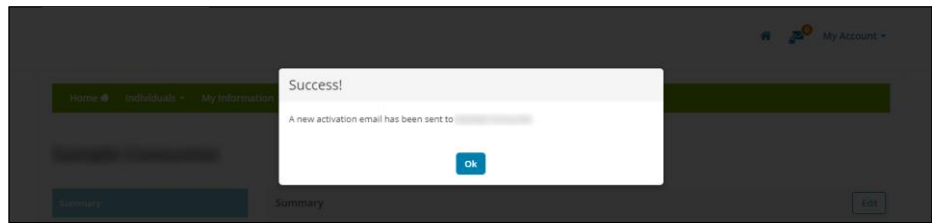
- Step-2: Click on the  button and click on 'Details'.



- Step-3: Go to "Actions" section and click on 'Resend Activation Email'.



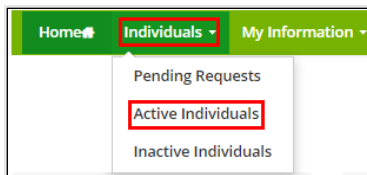
- Step-5: A pop-up screen will appear with a 'Success!' message.



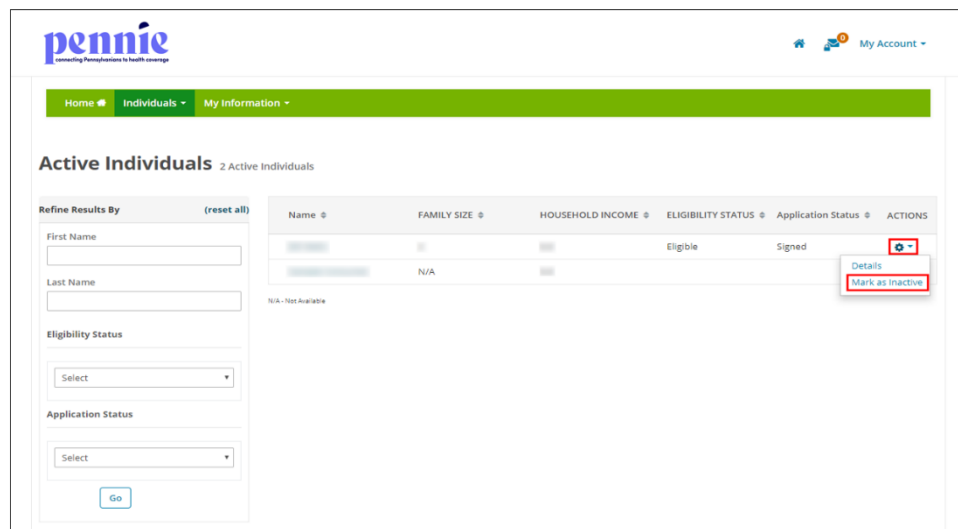
3.2.3 Mark an individual as inactive

PLEASE NOTE: This action cannot be undone. If an individual is marked as inactive, then it will terminate the existing relationship between the Assister and Customer. The marked inactive individual will be listed in the “Inactive Individuals” section.

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

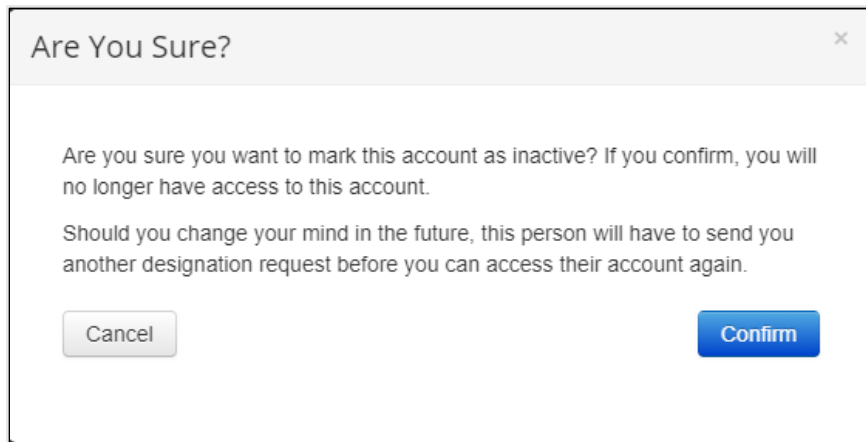


- Step-2: Click on the  button and click on ‘Mark as Inactive’.



- Step-3: A pop-up screen will appear. Click on ‘Confirm’ to inactivate a current individual account or click on ‘Cancel’ to cancel the process.

PLEASE NOTE: If you mark an individual account as inactive, then you will no longer have access to their account. The individual has to send you another designation request to you to perform actions on their behalf.



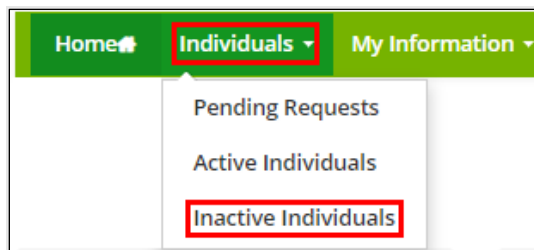
3.3 Inactive Individuals (Undesignated Customers)

The Inactive Individual section displays the list of individuals whose designation requests have been declined, marked as inactive by the Assister, or the individual has undesignated the Assister.

The Assister can view and search for the list of inactive individuals filtered by their first name, last name, and an inactive date range.

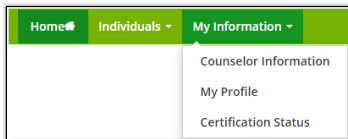
3.3.1 View and search for Inactive individuals

- Step-1: Click on the 'Individuals' tab and select 'Inactive Individuals'.



- Step-2: Enter the individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range an individual account has been inactive in the 'Inactive Since' section under the "Refine Results By" section and click on the 'Go' button.

4. My Information

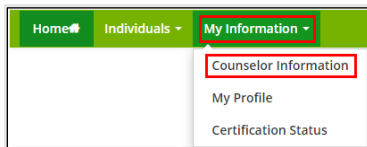


4.1 Assister Information

The Assister Information Section displays Assister information, which includes individual Assister Information, Mailing Address, and Profile Information. This information can be updated within this Section.

4.1.1 Add or update Assister information

- Step-1: Click on 'My Information' tab and select 'Counselor Information'.



- Step-2: Click on the 'Edit' button.

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Home ▾ Individuals ▾ **My Information ▾**

Steps

- My Information
- Profile
- Certification Status

Assister Information Save

First name

Last name

Email

Phone number

Secondary Phone Number

How would you like us to contact you?

Is this Enrollment Counselor Certified?

Enrollment Counselor Certification #

Primary Certified Enrollment Counselor Site

Secondary Certified Enrollment Counselor Site

Mailing Address

Street Address 1

Suite

City **DuBois**

State **PA**

Zip Code **15801**

Profile Information

Spoken Languages Supported **English**

Written Languages Supported **English**

Education **College Graduate**

Photo

- Step-3: Enter Assister Information (e.g., “First Name” or “Phone Number”), Mailing Address and Profile Information (e.g., “Spoken Languages Supported” or “Written Languages Supported”) and click on the ‘Save’ button.



My Account

Home
Individuals
My Information

Steps
My Information
Profile
Certification Status

Certified Enrollment Counselor Information

First name *

Last name *

Email *

Phone number *

Secondary Phone Number

How would you like us to contact you? *
☒ Email
☐ Phone
☐ Mail

Is this Enrollment Counselor Certified?
☐ No
☒ Yes

Certified Enrollment Counselor Certification #

Primary Certified Enrollment Counselor Site

Secondary Certified Enrollment Counselor Site

Mailing Address

Street Address 1 *

Suite

City *
DuBois

State *
PA

Zip Code
15801

Profile Information

Spoken Languages Supported (Select all that apply) *
☒ English
☐ Arabic
☐ Armenian
☐ Cambodian
☐ Cantonese
☐ Farsi
☐ Hmong
☐ Korean
☐ Mandarin
☐ Russian
☐ Spanish
☐ Tagalog
☐ Vietnamese
☐ Other

Written Languages Supported (Select all that apply) *
☒ English
☐ Arabic
☐ Armenian
☐ Cambodian
☐ Farsi
☐ Hmong
☐ Korean
☐ Russian
☐ Spanish
☐ Tagalog
☐ Traditional Chinese character
☐ Vietnamese
☐ Other

Education *

Upload Photo

4.2 Profile

For detailed information on the Assister Profile please refer to Section 2.2.

4.3 Certification Status

The Certification Status section provides a read-only listing to Pennie Assister Number, Certification Status, Assister Certification Number, Assister Start Date, Certification Renewal Date, and Activity Status.

PLEASE NOTE: The Certification Status of an Assister must be “Certified” to gain access to the Assister portal and the Activity status must be “Active” to appear in the “Find Local Assistance” directory tool.

There are three possible Certification Statuses for the Assistors, which are described below:

Pending

The Pending status is the default status assigned to a new Assister whose account has been created by their Entity Organization on the Pennie platform and the Entity administrator is reviewing their information.

Certified

The Certified status is assigned once the Entity administrator has verified the Assister information. Only an Assister with Certified Status can have full access to the Assister portal.

Denied

The Denied Certification Status is assigned when an Assister’s certification is rejected.

There are two Activity Statuses for the Assistors, which are described below:

Active

The Active status is assigned to an Assister by the Entity Organization or Entity administrator. An Assister with active status will be listed in Pennie’s “Find Local Assistance” directory tool, which is used by customers to locate Assistors in their area. The Assister will appear in the Assister search list which is used by the Entity to change customer delegation from one Assister to another Assister within the Entity Organization.

Inactive

The Inactive status is assigned to an Assister by the Entity Organization or Entity administrator. An Assister with an Inactive status won’t be listed in Pennie’s “Find Local Assistance” directory tool, which is used by customers to locate Assistors in their area. The Assister will not appear in the Assister search list which is used by the Entity to change customer delegation from one Assister to another Assister within the Entity Organization.

The screenshot shows the pennie website's 'My Information' page. A green navigation bar at the top contains 'Home', 'Individuals', and 'My Information'. Below this, a sidebar on the left lists 'My Information', 'Profile', and 'Certification Status' (which is highlighted in blue). The main content area is titled 'Certification Status' and contains several input fields: 'Assister Pennie Certification Number', 'Assister Certification Number', 'Assister Certification Start Date', and 'Certification Renewal Date'. The 'Certification Status' is displayed as 'Certified', and the 'Activity Status' is 'Active'.

Document Revision History

Version	Issue Date	Changes	Drafted	Approved
1.0	09/11/2020	Initial Release	Scott Yeager	Kyrie Perry Charles Angelo Brett Flower Robert Kothe