

Entity User Reference Manual

September 14, 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 Entity Portal of the Pennie Platform. "Entity" refers collectively to the health insurance Assister organizations that offer enrollment assistance to Pennsylvania's Customers. Throughout this document, Assister organizations are referred to as "Entities or Entity."

The Entity Portal is a complete solution to add/manage Assisters of the organization, submit applications and enrollments and perform account maintenance transactions on behalf of the Assisters for the existing Customers, change Customer designation from one Assister to another within the organization, perform account maintenance for the organization, and manage organization's and Assister's book of business.

2. Home Page

ASSISTERS - DELEGATIONS - ACCOUNT -

The Home Page is the landing page for Entity organization. This section displays the list of Assisters associated with the Entity Organization, allows the Entity to add new Assisters, view and search for Assisters associated with the organization, and edit Assister information.

2.1 Add Assister

This section allows the Entity to add Assisters for the Entity Organization who will assist and perform actions on behalf of the Customers.

PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assisters will not receive the invitation email to claim their account until the Assister Program Manager has verified their completion of the Training and Certification curriculum and updated their Certification Status to "Certified."

2.1.1 Add new Assister

• Step-1: Click on the 'Add Assister' button on the home page.

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		a 🗃 Nghasara -
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 Step-2: Fill out New Assister Form (e.g., "First Name" or "Primary Phone Number"), enter the Mailing Address, Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported" or "Education") and click on the 'Save' button.
 <u>PLEASE NOTE:</u> The suggested value for "Is this Assister Certified?" field is "No" (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/Assister functionality).

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A	SSISTERS - DELEGATIONS - ACCOUNT -		
A.6	Ansister Form		
	New Assister Form First Nome *		
	Last Name :		
	Errol -	company@wmail.com	
	Phone number *	XXX XXX XXXX	
	Secondary Phone Number	XXX XXX XXXX	
	How would you like us to contact you?	⊖ Ernal ● Phone ○ Mail	
	Is this Assister Certified?	No Ves	
	Primary Assister Site 1	Select 👻	
	Secondary Assister Site	Solect	
	Mailing Address		
	Street Address *	Street Name, P.O. Box, Company, c/o	
	Suite	Apt, Suite, Unit, Bldg, Floor, etc.	
	City	City, Town	
	State *	Select	
	Zip Code *		

Profile Information	
Profile Information	
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	Protect American Conclusion Conclusion Conclusion Parti Conclusion Parti Conclusion Partice P
Education	Select V
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View and Search for Assisters

• Step-1: Go to Entity portal 'Home Page'.

Pennile connecting Pennsylvanians to health coverage	ASSISTESS - DELEGATIONS - ACCOUNT - ASSISTECTS 1 Matching Assisters Add Assister
	Number Assister' Finst Name CERTIFICATION Assister' Finst Name Assister' Lust Name 0 0 0/0/0/2021 LActive Certified Status 0 0/0/0/2021 LActive Certified Certified
	Certification Status Serie V Anidor Certification Revenue Date From NAV/DD/YYYY A MAVDD/YYYY A
	Go
pennie -	Provide ^{we} Privacy Pullary

• Step-2: Search Assisters by entering Assister's first name in the 'Certified Assister first name' field; last name in the 'Certified Assister last name' field; select Assister activity status from the 'Active' or 'Inactive' status; select Assister certification status from the 'Certification Status' drop-down list (e.g., "Pending" or "Certified"); or select a desired date range during which the Assister's certification will be renewed from the 'Certification Assister Renewal Date' section under "Refine Results By" section. Click on the 'Go' button.

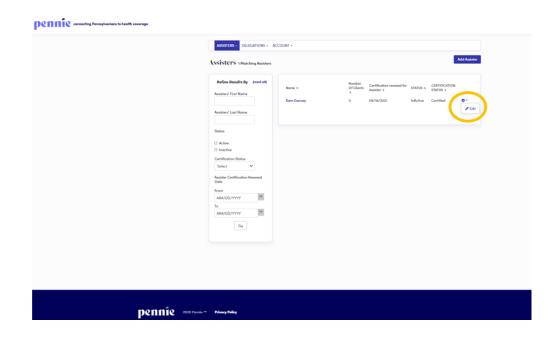
Pennie envecting Prosphericine to health converge	ASSISTERS - DELEGATIONS - ACC ASSISTERS 1 Matching Assisters	OUNT -				Add Amister
	Rofine Results By (reset all) Assisters' First Name Assisters' Lost Name	Name e Sam Garvey	Number Of Clients 8	Certification renewal for Assister # 09/16/2021	STATUS e InActive	0-
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	MM/CD/YYY M To MM/CD/YYY M Co					
pennie 🚥	0 Passale ** Privacy Policy					

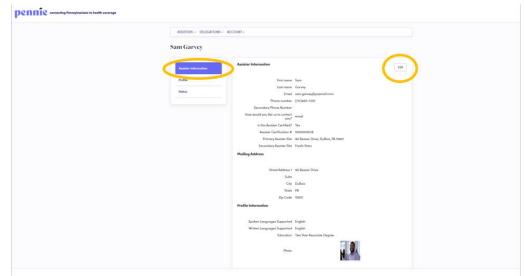
2.2 Edit Assister Information

The Edit Assister information section helps the Entity in managing the Assister information, view Assister profile, and update the Assister activity status.

2.2.1 Add or update Certified Assister information

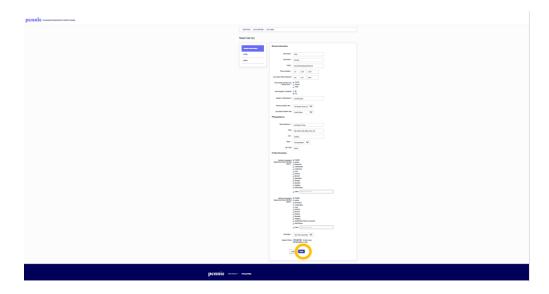
• Step-1: Click on 🔅 and click on the 'Edit' button on the home page.





• Step-2: Click on the "Assister Information" section and click on 'Edit' button.

Step-3: Enter the 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.



2.2.2 View Certified Assister profile

• Step-1: Click on 🔅 and click on the 'Edit' button on the home page.

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	Audier/FortNore Audier/FortNore Settor Setto

• Step-2: Click on the "Profile" section and the following screen will display the Assister's profile information.

ASSISTERS - DELEGATIONS	 ACCOUNT - 			
Sam Garvey				
Assister Information Profile Shalue		sam.garvey@yopmail.com	Vereingen ma Concele Mag das 2023 - There at las	
	Language Spoken Language Written			

2.2.3 Update Certified Assister activity status

• Step-1: Click on 🔅 and click on the 'Edit' button on the home page.

Backes Reads by prest rill Name 8 Name 6 Centration mend for gather 5 Status Centration Assister' first fame Sam Garvey 0 0/0/6/2021 InActive Centration Samiser Sam Garvey 0 0/0/6/2021 InActive Centration Samiser Sam Garvey 0 0/0/6/2021 InActive Centration	
Centralica Subus Salest V Anàrite Centralicato Russeal Dese Ram MANDO/YYYY B MANDO/YYYY Co	

• Step-2: Click on the "Status" section and click on 'Edit' button.

ASSISTERS - DELEGATIONS	- ACCOUNT -				
Sam Garvey					
	Status			Edit	
Assister Information	Status		InActive		
Profile		ur certification application here	. You can also see the histo	ry of previous actions related to your	
Status	status. Assister History				
	Date	Previous status	New Status	View Comment	
	09/16/2020	InActive	InActive	No Comments	

• Step-3: Select a new Assister activity status (e.g., "Active" or "Inactive") from the 'New Status' drop down list and provide comments in the 'Comment' section and click on the 'Save' button.

PLEASE NOTE: The Assister must be in "Active" activity status in order to appear in the "Find Local Assistance" directory tool and appear in the Assister search list while

the Entity is changing Customer delegation from one Assister to another Assister within the Entity Organization.

ASSISTERS - DELEGATIO	INS - ACCOUNT -				
Sam Garvey					
	Status	Active o	Inactive		
Assister Information		Status InActive			
Profile	-	New Status Select	Ţ		
Status		Comment			
_		Cancel			
	Date	Previous status	New Status	View Comment	
	09/16/2020	InActive	InActive	No Comments	

3. Certified Assisters

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	· · · · · ·	DELEGATIONS -								
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3.1 Manage Assisters

For detailed information on how to Manage Assisters please refer to Section 2.

4. Delegations



4.1 Pending Delegation Requests (New Designation Request)

The Pending Delegation Requests section displays a list of pending Customer designation requests for an Assister associated with the Entity Organization. The Entity has an option to accept or decline an individual's designation request on behalf of the Assister. If the request is accepted, then the individual will move to the Active Customers section. If the request is declined the Customer will automatically move to the Inactive Customers section. The Entity can view and search for the list of pending Customer designation requests filtered by Customer Name, Assister name, and request received date range.

4.1.1 View and search for pending delegation requests

• Step-1: Click on the 'Delegations' tab and select 'Pending Delegation Requests'.



• Step-2: Enter customer's name in the 'Customer Name' field or Assister name in the 'Assister Name' field or enter the desired date range during which an individual

delegation request was received in the 'Received On' section under the "Refine Results By" section and click on the 'Go' button.

ASSISTERS - DELEGATIONS -	ACCOUNT -						
Assisters 1 Matching Assister						Add Assister	
Refine Results By (reset all) Assisters' First Name	Name #	Number Of Clients	Certification renewal for Assister #	STATUS #	CERTIFICATION STATUS =		
	Sam Garvey	0	09/36/2021	InActive	Certified	0-	
Assisters' Lost Nome							
Status							
C Active							
Certification Status Select 🛩							
Assister Certification Renewal Date							
From MM/DD/YYYY							

4.1.2 Accept or decline individual delegation request

• Step-1: Click on the 'Delegations' tab and select 'Pending Delegation Requests'.



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

ASSISTERS - DELEGATIONS - A	CCOUNT +					
Assisters 1 Matching Assisters					Add Assister	
Refine Results By (reset all) Assisters' First Name	Nome #	Number Of Clients	Certification renewal for Assister #	STATUS =	CERTIFICATION STATUS ©	
Assisters' Last Name	Sam Garvey	0	09/16/2021	InActive	Certified	
Status						
Active Inactive Certification Status						
Select ~ Assister Certification Renewal						
Date From MM/DD/YYYY						
To MM/DD/YYYY						
Go						

4.2 Active Customers (Existing Designations)

The Active Customers section displays a complete list of Customer designations accepted by the Assisters. The Active Customers list displays their name, date since their designation is active, designated Assister name, eligibility status, application status, and an action button that assists an Entity in performing actions on an individual account on behalf of the designated CEC.

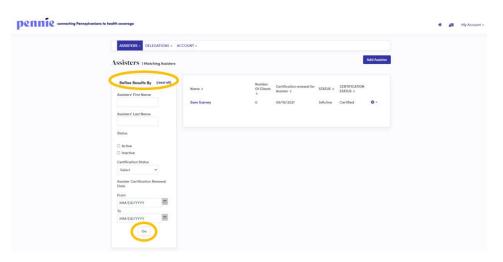
The Active Customers section helps an Entity to view and search for active individuals list, transfer Customer delegation from one Assister to another within the Entity Organization, view individual summary, provide comments on an individual's profile, and mark an individual as inactive.

4.2.1 View and search for active designations

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

Demmie connecting Pennsylvanians to health cover	rage		
ASSI	STERS -	DELEGATIONS -	ACCOUNT -
		Pending Delega	tion Requests
Assis	ters	Active Customer	s
		Inactive Custom	ers

• Step-2: Search by entering the customer's name in the 'Customer Name' field; Assister name in the 'Assister Name' field; select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list' select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list; or enter the desired date range since the customer designation is active in the 'Active Since' section under the "Refine Results By" section. Then click on the 'Go' button.



4.2.2 Change customer delegation from one Assister to another Assister

This section helps the Entity in changing a customer delegation from one Certified Assister to another within the Entity Organization. This step is performed when an Assister is no longer associated with the Entity organization.

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

Dennie connecting Pennsylvar	ians to health coverage		
	ASSISTERS -	DELEGATIONS -	ACCOUNT -
		Pending Delegation R	
	Assisters	Active Custome	rs
		Inactive Custom	iers

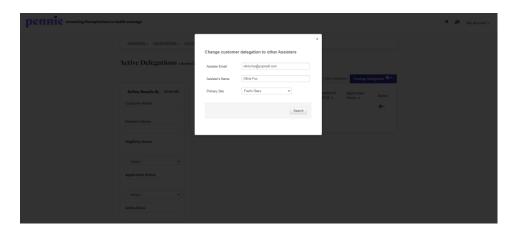
• Step-2: Select checkbox next to a customer's name, click on the 'Change Delegation' button and select the 'Change Delegation'.

PLEASE NOTE: The 'Change Delegation' button is only activated when the Entity selects the checkbox next to the Customer's name.

Active Delegations 1 Active	e Delegations(s)						
				(1 Item Sele	ed) Change Du	Negation •-	
Refine Results By (reset all) Customer Name	Customer Name a	Active Since s	Assister's Name a	ELIGIBILITY STATUS ©	Application Status s	Action	
Assister's Name		00/20/2020	Jun Garvey				
Eligibility Stotus							
Select ~							
Application Status							
Select ~							

• Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

PLEASE NOTE: Only the Assisters with "Active" activity status will appear in the Assister search list.



• If the Entity wants to see all the active Assisters present in the Entity organization, just click on the 'Search' button.

pennie analie Provinsia to bath more p						* a mykanovis
ASSISTER: - DELECATIONS - ACC	Change custom	er delegation to other Assi	×			
Active Delegations same	Assister Email	olivia fox@yopmail.com				
Define Results By (Present)	Assister's Name Primary Site	Olivia Fox Fred's Stars	22	Advillantian Advillantian Datus a	Action	
Castere Name		(Search		0.	
Assistery Norma						
The second secon						
Application States						
Refer to the second						
Active Since						

• Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.

pennie conserve functions to beats commun		$\mathbf{n} = \mathbf{p}^{0} \mathrm{i}_{\mathrm{Matrix}},$
AUGUTUS - DELEGRIDUS -	Search	1
Active Delegations of	Enrollment Counselor Email Primary Name Site	
	CRivia Fox olivia Sox@yopmail.com Fried's Stars	DiverSecond Comparison Office
Rofine Results By Preset all		CORTE Application Action 2016 1 Distance Action
California Noisee	Re-assign	0-
Annuevillarue		
Elipholity Stotus		
Third (1)		
Appleation States		
Attesting		
Nin or		

4.2.3 Change multiple customer delegations from one Assister to another Assister

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

ASSISTERS -	DELEGATIONS -	
	Pending Delega	tion Requests
Assisters	Active Customer	s
	Inactive Custom	ers

• Step-2: Select the main checkbox next to the 'Customer Name' title, click on the 'Change Delegation' button and select 'Change Delegation'.

PLEASE NOTE: The 'Change Delegation' button is only activated when the Entity selects the checkbox next to the 'Customer Name' title.

nnsylvanions to health, coverage		
ASSISTERS - DELEGATIONS - ACCOUNT -		
Active Delegations TActive Delegation(i)		
(1)	em Selected) Change Delegation 🗢	
Refine Results By (reset all) Customer Name 2 Active Since 2 Assister's Name 8 ELIGIB Customer Name	ILITY Application Action S o Status a Action	
Customer Name 09/28/2020 Sam Garvey	0-	
Assister's Name		
Eligibility Stotus		
Select ~		
Application Status		
Select v		
Active Since		
From:		

• Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

PLEASE NOTE: Only the Assisters with "Active" activity status will appear in the Assister search list.

pennie connecting Pennsylvanians to he	colth coverage						# # »	ly Account +
	ASSISTERS - DELEGATIONS - ACCO	Change custome	r delegation to other Assisters	×				
	Active Delegations TActive	Assister Emeil Assister's Name	olivia fox@yopmail.com	1 litern Selec	ied) Change Dele	pation Ø-		
	Refine Results By (reset all) Customer Name	Primary Site	Fred's Stars 👻			Action		
	Assister's Name		Sear	ch				
	Eligibility Status							
	Active Since							

• If the Entity wants to see all the active Assisters present in the Entity organization, just click on the 'Search' button.

pennie contes temperature to batte energy				 A Stylemoster
ADDITIES - DELLOANICAS - ACC			*	
Active Delegations same	Assister Email	olivia fox@yopmail.com		
	Assister's Name	OB-la Fox	riteri Lincolat	
Buffine Basilie By Descently	Primary Site	Frødis Stars 👻	GRIDLITY Argumention Account	
Cuttered Name		Searc	a	
Antimes Norm		_		
Explainty Status				
Application States				
Taket a				
Kative Since				

• Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.

pennie conserting transportante to b	ülth cuirrige			· · · · · · · · · · · · · · · · · · ·
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	Active Delegations masse	Enrollment Counselor Email Primary Name Site		
		Olivia Fox olivia fox@yopmail.com Fred's Stars	Devision (1) Constraint Strengther 9-	
	Rofine Results By Internality		Autority Application Autors MUS a Distort a Autors	
	Culture Nore	Re-assign	a.	
	Annahol's Rome			
	Eligibility Status (
	Active Since			

4.2.4 Perform actions on customer profile

The Entities can perform actions on customer accounts which includes view customer summary, provide comments on a customer's profile, resend activation email to a customer and mark an individual as inactive.

4.2.4.1 View individual summary

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



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

pennie connecting Pennsylvanians to health coverage		My Account -
ASSISTERS - DELEGATIONS - A	ACCOUNT -	
Active Delegations 14e	tive Delegations(s)	
	(0 ltems Selected)	
Refine Results By (reset all) Customer Name	Customer Name a Active Since a Assister's Name a ELIGBELTY Application Data Smart 09/25/2020 Sam Garvey	
Assister's Nome	Details	
Eligibility Stotus		
Select V		
Application Status		
Select ~		
Active Since		
From: MM/DD/YYY		

• Step-3: Go to "Summary" section and the following screen will display an individual summary.

pennie connecting Pennsylvanians to health o	Connega	My Account -
	Assistes Deleations - Account -	
	Abure this Researched Summary Removery Primary Applicant Das Smart Connects Addems 22 Weit Date Pactors Connects Addems * Vare Indektaat Account Eligibary Status * New Connect Applicanto Itatus	

4.2.4.2 Provide comments on individual profile

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

	ASSISTERS -	DELEGATIONS -	ACCOUNT -
	Assisters	Pending Delega	ition Requests
	Assisters	Active Custome	rs
		Inactive Custom	iers

pennie connecting Pennsylvanian	to health coverage	🕷 🚙 My Account –
	ASSISTERS - DELEGATIONS - ACCOUNT -	
	Active Delegations (Active Delegations(s)	
		(O literns Selected)
	Refine Results By (reset all) Customer Name & Active Since & Assister's Name & ELIGIE STATU	IILITY Application Action
	Customer Name Dan Smart 09/25/2020 Sam Garvey	0.
	Assister's Nome	Details
	Eligibility Stotus	
	Select v	
	Application Status	
	Select v	
	Active Since	
	From: MM/DD/nyy a	

• Step-3: Go to "Comments" section and click on the 'Add Comments' button.

pennie concing hospitalian to hatth courses	•	🚳 My Account +
ASSISTERS - DELEGATIONS - ACCOUNT -		
Dan Smart		
Commonts		
Summary Na commands Add Internal Commands		
Consent		
© Actions		

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

pennie connecting Pennsylvanians to health coverage		🖷 💣 My Account -
ASSISTERS - DELEGATIONS -	ACCOUNT -	
Dan Smart		
	Comments	
Summary	No comments Add Internal Comments	
Comments		
© Actions	Characters left: 4000 Cancer Fast Command	

• Step-4 (Another way): Perform Step-1 and Step-2 from Section 4.2.4.2 and click on 'New Comment' under the "Actions" section.

Pennie enneting Pennytenians to health enverage Asserters - Deleastichts - Account -	n 🔊 My Account -
Dan Smart	
Sumory Carments A Actions The Canned Comments Characters laft: 4000 Cannel Not Comments	

• Step-4 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.

pennie connecting Pennsylvanians to health cover	rage				# m My Account +
ASSE	ISTERS - DELEGATIONS - ACCO	Dan Smart			
Dan 5	Smart	Enter comments here	Characters left: 4000		
	mary				
				Cancel Post Comment	
	ctions New Comment				

4.2.4.3 Update comments on individual profile

• Step-1: Click on the 'Delegations' tab and select 'Active Customers'.



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

pennie connecting Pennsylvanians to health coverage		🐐 🔊 My Account -
ASSISTERS + DELEGATIONS +	ACCOUNT -	
Active Delegations 1	Active Delegations(s)	
	(0 litems Selected)	
Refine Results By (reset all)	Customer Name Active Since Assister's Name ELIGIBILITY Application Action Action	
Customer Name	Dan Smort 09/25/2020 Sam Garvey	
Assister's Nome	Details	
Eligibility Status		
Select v		
Application Status		
Select v		
Active Since		
From: MM/DD/YYY		

• Step-3: Go to "Comments" section and click on the button.

pennie connecting Pannaylvanians to health cov	*****		n 🔊 My Account -
AS	SISTERS - DELEGATIONS - ACCOU	UNT -	
Dan	Smart		
	immory	Comments Find Gran anderd a comment - 28 Says, 2020 (23:39 PM. Dari In looking Gra houth insurance. Add Inherend Comments	

• Step-4: Enter the updated comment in the text area and click on the 'Update Comment' button.

ASSISTERS - DELEGATIONS	- ACCOUNT -	
Dan Smart		
Summary Connework @ Actions @ New Comment	Connected Fined flour added a comment - 25 Sep, 2000 02:39 PM Date is loading for health insurance. And EXITAL for his desighter Carolinal Add Educated Comment Add Internet Comments	~

4.2.5 Mark an individual as inactive

<u>PLEASE NOTE:</u> *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 Customer" section.

• Step-1: Click on the 'Delegations' tab and select 'Active Customer'.

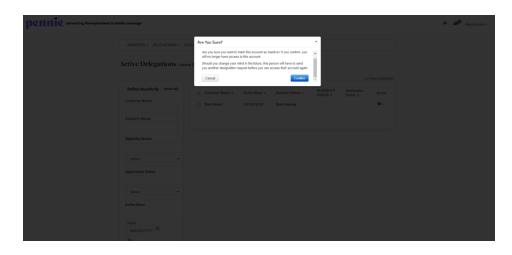
Connecting Pennsylvanians to health	a coverage		
	ASSISTERS -	DELEGATIONS -	
		Pending Delega	tion Requests
Λ	ssisters	Active Customer	s
		Inactive Custom	ers
	-		

• Step-2: Click on the ^{***} button and click on 'Mark as Inactive'.

ASSISTERS - DELEGATIONS - AC	COUNT +							
Active Delegations 1Activ	ve Delegations(s)							
					(0	Items Selected)		
Refine Results By (reset all)	Customer Name a	Active Since o	Assister's Name 0	ELIGIBILITY STATUS ©	Application Status o	Action		
Customer Name	 Dan Smart 	09/25/2020	Sam Garvey			0-		
Assister's Name					Details Mark as	Inortia		
Eligibility Status					Mulkus			
Select ~								
Application Status								
Select ~								
Active Since								

• Step-3: A pop-up screen will appear. Click on 'Confirm' to inactivate current individual account and 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 delegation request before you can perform actions on their behalf.



4.3 Inactive Customers (Undesignated Customers)

The Inactive Customers section displays the list of individuals whose delegation requests were declined, were marked as inactive by their Entity organization or Assister, or the individual dedesignated the Assister. The Entity can view and search the list of inactive individuals, filtered by Customer Name, Assister Name, or an Inactive date range.

4.3.1 View and search for inactive customers

• Step-1: Click on the 'Delegations' tab and select 'Inactive Customer'.



• Step-2: Enter individual's first name in the 'Customer Name' field; Assister name in the 'Assister Name' field; or enter the desired date range since an individual

designation has been inactive in the 'Inactive Since' section under the "Refine Results By" section. Then click on the 'Go' button.

ASSISTERS - DELEGATIONS - A	CCOUNT -			
Inactive Customers 10	nactive Customer			
Refine Results By (reset all) Customer result	Customer Name # Dan Smart	In-Active since s 09/25/2020	Assister's Name o Sam Garvey	
Assister's Name				
Inactive Since				
From: MMUDD/YYY To: MMUDD/YYY				

5. Account

ASSISTERS - DELEGATIONS - ACCOUNT -
Assisters 2 Matching Assister Populations Served
Refine Results By (reset all) Contact Information
Assisters' First Name Document Upload
Registration Status

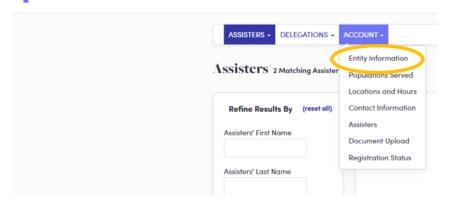
The Account section provides the Entity organization information that was entered while creating an Entity account. This section allows the Entity to update the Entity information, Populations served, Location and hours, contact information, add and update Certified Assister, and view current Entity organization registration status.

5.1 Entity Information

5.1.1 Edit entity information

• Step-1: Click on the 'Account' tab and select 'Entity Information'.

pennie connecting Pennsylvanians to health coverage



• Step-2: Go to "Entity Information" section and click on the 'Edit' button.

ASSISTERS - DELEGATIONS	ACCOUNT -		
Steps	Entity Information		E
Entity Information	Entity Number	100000035	
Populations Served	Entity Type	Certified Navigator Entities	
	Certified Enrollment Entity name	Joy Hands Assisters	
Locations and Hours	Business Name (Legal)	Joy Hands Assisters	
Contact Information	Primary Email Address	fred.star@yopmail.com	
conder mornanon	Primary Phone Number	(717)460-7307	
Assisters	Secondary Phone Number		
	Fax Number		
Document Upload	How would this person like to be contacted?	Email	
Payment Information	Federal Tax ID	867530901	
Registration Status	State Tax ID	0177722298	
Registration status	Organization Type	Faith-based organization	
	Counties You Serve	Clearfield	
	Did your organization receive an Outreach and Education Grant?	No	

• Step-3: Edit Entity information (e.g., "Entity Name" or "Primary Phone Number" or "State Tax ID" number) and click on the 'Save' button.

PLEASE NOTE: Many of the options on this screen, including information related to grant funding, relate to functions that Pennie has chosen not to enable on the Pennie Platform. For the options here we have provided suggested values, such as Entity Type is "In-person Assistance", Organization Type is "Private Partnership", and Did your organization receive an Outreach and Education Grant? is "No".

ASSISTERS - DELEGATIONS -	5- ACCOUNT-	
Page	Step 1: (psily Information	
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Assesses	Primary i mail Address • Ball dar Generalizant	
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Payment Information	Secondary Phone Norther and xxx Man	
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5.2 Populations Served

5.2.1 Edit populations served information

• Step-1: Click on the 'Account' tab and select 'Populations Served'.

connecting Pennsylvanians to health coverage							* #
ASSISTERS - DELEGATIONS -	ACCOUNT -						
Assisters 2 Matching Assist	Entity Information Populations Served					Add Assister	
Refine Results By (reset all) Assisters' First Name	Contact Information Assisters Document Upload	Number Of Clients 0	Certification renewal for Assister 0	STATUS ©	CERTIFICATION STATUS 0		
Assisters' Last Name	Registration Status	0	09/25/2021 09/16/2021	Active Active	Certified Certified	0- 0-	
Status							
Active Inactive Certification Status							
Select v							
Assister Certification Renewal Date							
From MM/DD/YYYY ==							
mm/DD/TYTY =							

• Step-2: Click on the 'Edit' button.

ASSISTERS - DELEGATIONS	ACCOUNT -	
Steps	Populations Served	Edit
Entity Information	> Languages	
Populations Served	> Ethnicities	
Locations and Hours	> Industries	
Contact Information		
Assisters		
Document Upload		
Payment Information		
Registration Status		

• Step-3: Update the Languages (e.g., "English" or "Spanish"), targeted Ethnicities (e.g., "African" or "Chinese"), and Industries (e.g., "Health Care" or "Agriculture") information of the populations you intend to serve and an estimated percentage of assistance provided in each section. Click on the 'Save' button.

If your Entity organization does not target specific Ethnicities or Industries you can choose "Other," type in a value of "All," and mark "100" in the "Estimated Percent" columns.

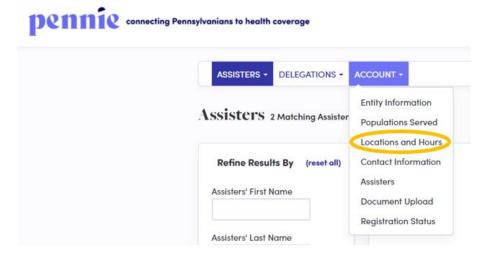
PLEASE NOTE: The total "Estimated Percent" value in each section must add up to 100%.

pennie connecting Po	ennsylvanians to health coverage		🏶 🚜 My Account •
	ASSISTERS - DELEGATIONS -	ACCOUNT -	
	Steps	Step 2: Populations Served	
	Entity Information Populations Served	> Languages	
	Locations and Hours	Check all languages of your target population and specify percentages accordingly.	
	Contact Information Assisters	Check all ethnicities of your target population and specify percentages accordingly.	
	Document Upload	Industries Check all industries that apply, and provide percentages per industry.	
	Registration Status	Cancel	
		_	

5.3 Location and Hours

5.3.1 Edit Primary Site information

• Step-1: Click on the 'Account' tab and select 'Locations and Hours'.



• Step-2: Click on the Entity organization's primary site name.

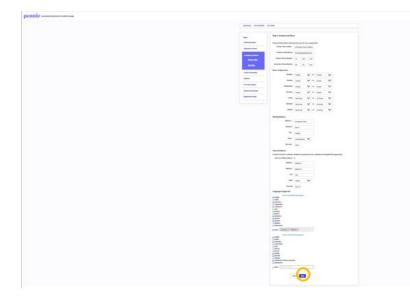
ASSISTERS - DELEGATIONS	S - ACCOUNT -	
Steps	Site Name	Address
Entity Information		Add Sub-Site
Populations Served	> 90 Beaver Drive, DuBois, PA 15801	90 Beaver Drive Box 12 DuBois PA
Locations and Hours	and the second sec	
Contact Information	> Fred's Stars	112 Daisy Street Clearfield PA
Assisters		
Document Upload		
Payment Information		
Registration Status		

• Step-3: Click on the 'Edit' button.

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ASSETURE - DELEGATIONS -	ACCOUNT -	
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Lindiata and Nano Construction Anno Doment Island	Die Neues wer feinen Urste Judeis, PK Markt Prinzey Cand Matteur. In die artybegendeten. Neues Prinze Nachen (1955), 227 Konneter Prinze Nachen	
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	Physical Address N Address N Org Toma Parada	
	Languages Supported Spelan Languages Supported English Artweise, Camtrons, Handaris, Banian, Spanish Wither Languages Supported English Artweise, Banian, Spanish, Sudikard Olevan Antwester	
	> Fred's Strate	

• Step-4: Update primary site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the 'Save' button.

PLEASE NOTE: If you do not enter the Physical Address then the "Find Local Assistance" directory tool will not be able to provide geographic search results (i.e. by Zip code and distance) for your location.



5.3.2 Edit Sub-Site information

• Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

Pennsylvanians to health coverage	
ASSISTERS - DELEGATIONS -	
Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hours
Refine Results By (resot all) Assisters' First Name	Contact Information Assisters Document Upload
Assisters' Last Name	Registration Status

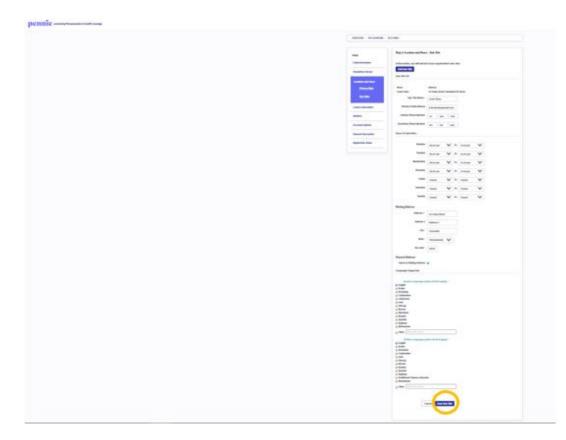
• Step-2: Click on the Entity Organization's sub-site name.

ASSISTERS + DELEGATIONS	ACCOUNT +		
Steps	Site Name	Address	
Entity Information		Add Sub-Sile	
Populations Served	> 90 Beaver Drive, DuBois, PA 15801	90 Beaver Drive Box 12 DuBois PA	
Contact Information	> Fred's Stors	112 Daisy Street Clearfield PA	
Assisters			
Document Upload			
Payment Information			
Registration Status			

• Step-3: Click on the 'Edit' button.

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• Step-4: Update sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the 'Save Sub-Site' button.



5.3.3 Add sub-site information

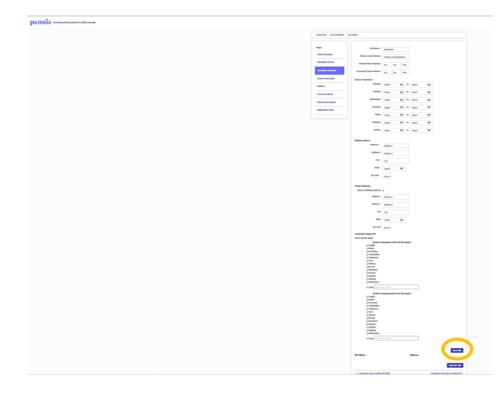
• Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

pennie connecting Pen	nsylvanians to health coverage	
	ASSISTERS - DELEGATIONS -	ACCOUNT -
	Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hours
	Refine Results By (resot all) Assisters' First Name	Contact Information Assisters Document Upload
	Assisters' Last Name	Registration Status

• Step-2: Click on the 'Add Sub-Site' button.

ASSISTERS - DELEGATIONS	- ACCOUNT -		
Steps Entity Information	Site Name	Address	
Populations Served	> 90 Beaver Drive, DuBois, PA 15801	90 Beaver Drive Box 12 DuBois PA	
Locations and Hours	> Fred's Stars	112 Daisy Street Clearfield PA	
Assisters			
Document Upload			
Payment Information			

• Step-3: Enter sub-site information including Hours of Operation, Mailing Address, Physical Address, and Languages Supported, then click on the 'Save Site' button.



5.4 Contact Information

5.4.1 Add or update primary contact and financial contact information

• Step-1: Click on the 'Account' tab and select 'Contact Information'.

ASSISTERS - DELEGATIONS -	
Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hour
Refine Results By (reset all)	Contact Information
Assisters' First Name	Assisters Document Upload
Assisters' Last Name	Registration Sta

• Step-2: Click on the 'Edit' button.

ASSISTERS - DELEGATIONS	· ACCOUNT ·	
ASSISTERS + DELEGATIONS		
Steps	Primary Contact	Edit
Entity Information	Name Fred Star	
Populations Served	Email fred.star@yopmail.com	
r opulations out rea	Primary Phone Number (717)460-7307 Secondary Phone Number	
Locations and Hours	How would this person like to be contacted?	
Contact Information	Financial Contact	
Assisters		
Document Upload	Name Fred Star Email fred.star@yopmail.com	
	Primary Phone Number (717)460-7307	
Payment Information	Secondary Phone Number How would this person like to be	
Registration Status	How would this person like to be contacted? email	

• Step-3: Enter Primary Contact information and Financial Contact information and click on the 'Save' button.

PLEASE NOTE: The Primary Contact and Financial Contact can be the same person.

ASSISTERS - DELEGATIONS	- ACCOUNT -				
Steps	Step 4: Contact Informatio	n			
Entity Information	Tell us about the contact peop	ole in your	organiza	tion.	
Populations Served	Primary Contact				
Locations and Hours	Nome *	Fred Sto	r		
Contact Information	Email*	fred.sto	r©yopmo	il.com	
Assisters	Primary Phone Number *	717	460	7307	
	Secondary Phone Number	***	***	****	
Document Upload	How would this person like				
Payment Information	to be contacted?	O Primar O Secon		10	
Registration Status		O Mail			
	Financial Contact				
	Nome *	Fred Sto	r		
	Email *	fred.sto	r@yopmo	al.com	
	Primary Phone Number *	717	460	7307	
	Secondary Phone Number	X01	XXX	XXXX	
	How would this person like to be contacted?				
	10 by control hours	 Primar Second 		10	
		0 Mail			
		Incel	Save		

5.5 Assisters

5.5.1 Add an Assister

PLEASE NOTE: The Assister user accounts can be created at any time in the year, but the Assisters won't receive the invitation email to claim their account until Pennie

Assister Program Manager has verified their completion of the Training and Certification curriculum and updated their Certification Status to "Certified."

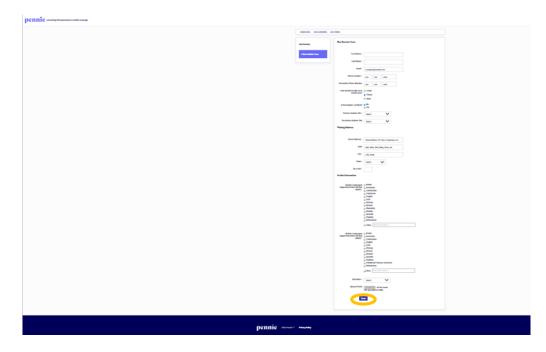
• Step-1: Click on the 'Account' tab and select 'Certified Assisters'.

ASSISTERS - DELEGATIONS -	
Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hour
Refine Results By (reset all)	Contact Information
Assisters' First Name	Assisters Document Upload
Assisters' Last Name	Registration Status

• Step-2: Click on the 'Add Certified Assister' button.

pennie connecting Pennsylvanians to health coverage						
ASSISTERS - DELEGATIONS - A ASSISTERS 2 Matching Assisters	CCOUNT +					Add Assister
Refine Results By (reset all) Assisters' First Name	Name ©	Number Of Clients ©	Certification renewal for Assister © 09/25/2021	STATUS ¢	CERTIFICATION STATUS ©	0-
Assisters' Last Name	Sam Garvey	1	09/16/2021	Active	Certified	0-
Status						
☐ Active ☐ Inactive Certification Status Select ❤						

• Step-3: Fill out New Assister Form (for e.g., "First Name" or "Primary Phone Number"), enter the Mailing Address, Profile Information (For e.g., "Spoken Languages Supported" or "Written Languages Supported" or "Education") and click on the 'Save' button. **<u>PLEASE NOTE</u>**: The suggested value for "Is this Assister Certified?" field is "No" (this relates to functionality which has been disabled in the Pennie Platform and will not impact Entity/Assister functionality).



5.5.2 Add or update Certified Assister's information

• Step-1: Click on the 'Account' tab and select 'Certified Assister'.

ASSISTERS - DELEGATIONS -	
Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hours
Refine Results By (reset all)	Contact Information
Assisters' First Name	Assisters Document Upload
Assisters' Last Name	Registration Status

• Step-2: Click on the ** button and click on 'Edit'.

ASSISTERS - DELEGATIONS -	ACCOUNT -				
Assisters 2 Matching Assisters					Add A
Refine Results By (reset all) Assisters' First Name	Name 0	Number Of Clients 0	Certification renewal for Assister ©	STATUS o	CERTIFICATION STATUS ©
	Olivia Fox	0	09/25/2021	Active	Certified
Assisters' Last Name	Sam Garvey	1	09/16/2021	Active	Certified
Stotus					
Active					
Inactive					
Certification Status					
Select ~					

• Step-3: Enter Assister information in the New Assister Form (for e.g., "First Name" or "Primary Phone Number"), enter the Mailing Address, Profile Information (For e.g., "Spoken Languages Supported" or "Written Languages Supported" or "Education") and click on the 'Save' button.

PLEASE NOTE: The suggested value for "Is this Assister Certified?" field is "No" (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/Assister functionality).

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5.6 Document Upload

PLEASE NOTE: This section can be ignored; Pennie does not require any documents to be uploaded by Entity organizations.

5.7 Payment Information

PLEASE NOTE: This section can be ignored; Pennie does not use the Pennie Platform to administer grant payments. Please choose a value of "No".

5.8 Registration Status

The Registration Status section provides a read-only listing to Entity organization's registration status and registration history.

There are two possible Registration Statuses for the Entity organizations, which are described below:

Pending

The Pending registration status is the default status assigned to a new Entity organization whose account has been created on the Nevada Health Link platform and the Entity administrator is reviewing their information.

<u>Active</u>

The Active registration status is assigned once the Entity administrator has reviewed and verified the Entity organization information. The Entity account must be in "Active" status in order for the organization's individual Assisters to be eligible for inclusion in the "Find Local Assistance" directory tool and to gain full-access to the Entity portal.

• Step-1: Click on the 'Account' tab and select 'Registration Status'.

pennie connecting Pennsylvanians to health coverage							
	ASSISTERS - DELEGATIONS -						
	Assisters 2 Matching Assister	Entity Information Populations Served Locations and Hours					
	Refine Results By (reset all) Assisters' First Name	Contact Information Assisters Document Upload					
	Assisters' Last Name	Registration Status					

• Step-2: The following screen displays the Registration Status for the Entity Organization.

ASSISTERS - DELEGATIONS	- ACCOUNT -			
Joy Hands Assisters	s			
Steps	Registration Statu	s		
Entity Information		Entity Number 10000003	5	
Populations Served	Status Active Registration Renewal Date 09-16-2021			
Locations and Hours				
Contact Information	Registration Histor			_
Assisters	09/16/2020	Previous status Pending	New Status Active	Comment No Comments
Document Upload	09/16/2020	Incomplete	Pending	No Comments
Payment Information				

Document Revision History

Version	Issue Date	Changes	Drafted	Approved
1.0	09/15/2020	Initial Release	Scott Yeager	Kyrie Perry Chachi Angelo Brett Flower