



# 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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Harrisburg, PA 17101

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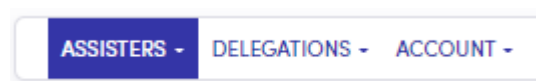
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# 1. Overview

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 Assistors of the organization, submit applications and enrollments and perform account maintenance transactions on behalf of the Assistors 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



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

### 2.1 Add Assister

This section allows the Entity to add Assistors 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 Assistors 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.

The screenshot shows the 'Assistors' management interface. At the top, there are tabs for 'ASSISTORS', 'DELEGATIONS', and 'ACCOUNT'. Below the 'ASSISTORS' tab, there's a sidebar on the left with filters for 'Active', 'Inactive', 'Certification Status', and 'Assistor Certification Renewal Date'. The main area displays a table of assistors. A 'Add Assistor' button is highlighted with an orange circle in the top right corner of the main area.

Name	Number	Certification renewal by	STATUS	CERTIFICATION
Sam Garvey	0	09/16/2020	InActive	Certified

- 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.  
**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).

The screenshot shows the 'New Assister Form' page. The form includes fields for 'First Name', 'Last Name', 'Email', 'Phone number', 'Secondary Phone Number', and 'Mailing Address'. The 'Is this Assister Certified?' field is set to 'No'. The 'How would you like us to contact you?' field is set to 'Phone'.

## View and Search for Assisters

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

- 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.

Assistors 1 Matching Assistors

Refine Results By (reset all)

Assistors' First Name

Assistors' Last Name

Status

☐ Active

☐ Inactive

Certification Status

Select

Assistor Certification Renewal Date

From MM/DD/YYYY

To MM/DD/YYYY

Go


Name	Number of Clients	Certification renewal for Assistor	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/16/2021	InActive	Certified

Add Assistor

## 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.

Assistors 1 Matching Assistors

Refine Results By (reset all)

Assistors' First Name

Assistors' Last Name

Status

☐ Active

☐ Inactive

Certification Status

Select

Assistor Certification Renewal Date

From MM/DD/YYYY

To MM/DD/YYYY

Go

Name	Number of Clients	Certification renewal for Assistor	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/16/2021	InActive	Certified

Add Assistor

Edit

- Step-2: Click on the “Assister Information” section and click on ‘Edit’ button.


The screenshot shows the Pennie user profile page for Sam Garvey. The page has a header with the Pennie logo and navigation links: ASSISTERS, DELEGATIONS, and ACCOUNT. The main content area is divided into two sections: 'Assister Information' and 'Profile Information'. The 'Assister Information' section is highlighted with a yellow circle, and the 'Edit' button is also highlighted with a yellow circle. The 'Assister Information' section contains fields for First name, Last name, Email, Phone number, Secondary Phone Number, How would you like us to contact you?, Is this Assister Certified?, Assister Certification #, Primary Assister Site, and Secondary Assister Site. The 'Profile Information' section contains fields for Spoken Languages Supported, Written Languages Supported, Education, and a Photo upload button.

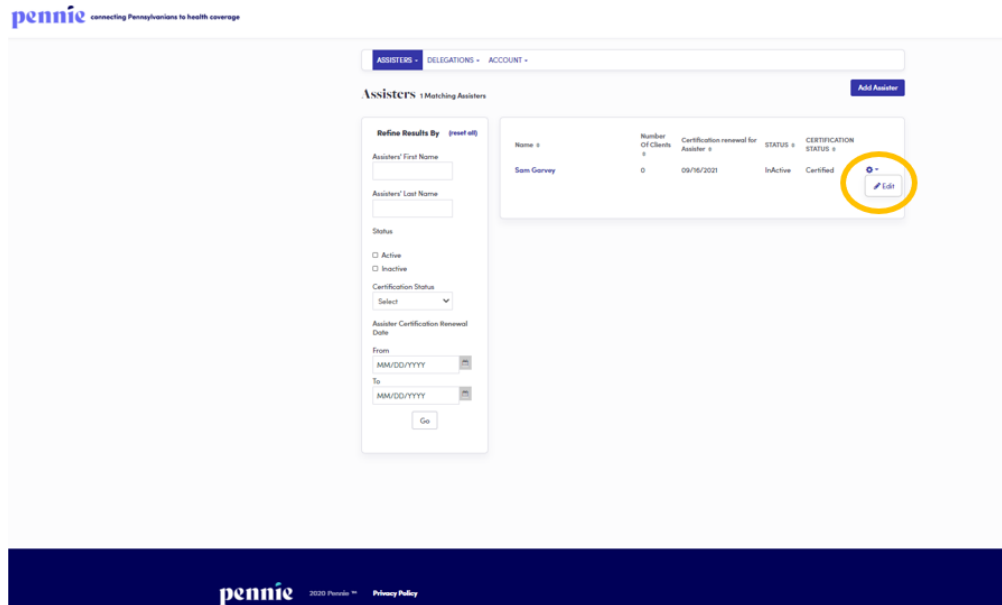
- Step-3: Enter the Assister Information (e.g., “First Name” or “Phone Number”), Mailing Address and Profile Information (e.g., “Spoken Languages Supported” or “Written Languages Supported”) and click on the ‘Save’ button.

The screenshot shows the Pennie user profile page for Sam Garvey, with the 'Assister Information' section expanded. The 'Save' button is highlighted with a yellow circle. The 'Assister Information' section contains fields for First name, Last name, Email, Phone number, Secondary Phone Number, How would you like us to contact you?, Is this Assister Certified?, Assister Certification #, Primary Assister Site, and Secondary Assister Site. The 'Profile Information' section contains fields for Spoken Languages Supported, Written Languages Supported, Education, and a Photo upload button. The 'Save' button is located at the bottom right of the 'Assister Information' section.



## 2.2.2 View Certified Assister profile

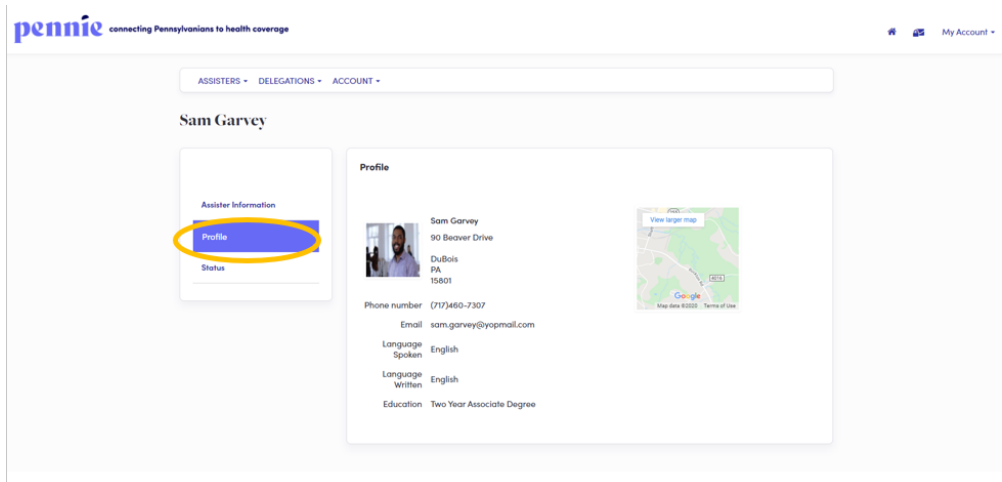
- Step-1: Click on  and click on the 'Edit' button on the home page.



The screenshot shows the Pennie Assistants management interface. At the top, there are tabs for ASSISTERS, DELEGATIONS, and ACCOUNT. Below the tabs, there's a section for ASSISTERS with a sub-header '1 Matching Assistants'. On the left, there's a 'Refine Results By' sidebar with filters for Assister's First Name, Assister's Last Name, Status (Active/Inactive), Certification Status, and Assister Certification Renewal Date. On the right, there's a table of assistants. The table has columns: Name, Number of Clients, Certification renewal for Assister, STATUS, and CERTIFICATION STATUS. The first row shows Sam Garvey with 0 clients, a renewal date of 09/16/2021, and a status of InActive. The CERTIFICATION STATUS column shows 'Certified' with an 'Edit' button circled in yellow.

Name	Number of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/16/2021	InActive	Certified

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



The screenshot shows the Pennie Assister Profile page for Sam Garvey. The page has a sidebar with 'Assister Information' and 'Profile' sections. The 'Profile' section is highlighted with a yellow circle. The main content area displays the Assister's profile information, including a photo, name, address, phone number, email, language, and education.

**Assister Information**


- Profile
- Status

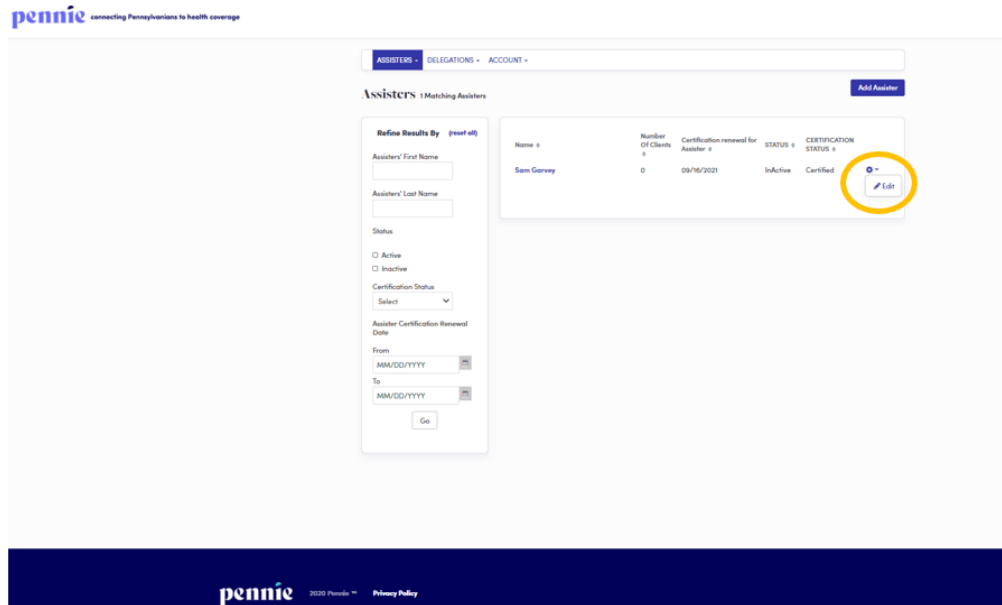
**Profile**

Sam Garvey  
90 Beaver Drive  
DuBois  
PA  
15801

Phone number (717)460-7307  
Email sam.garvey@yopmail.com  
Language Spoken English  
Language Written English  
Education Two Year Associate Degree

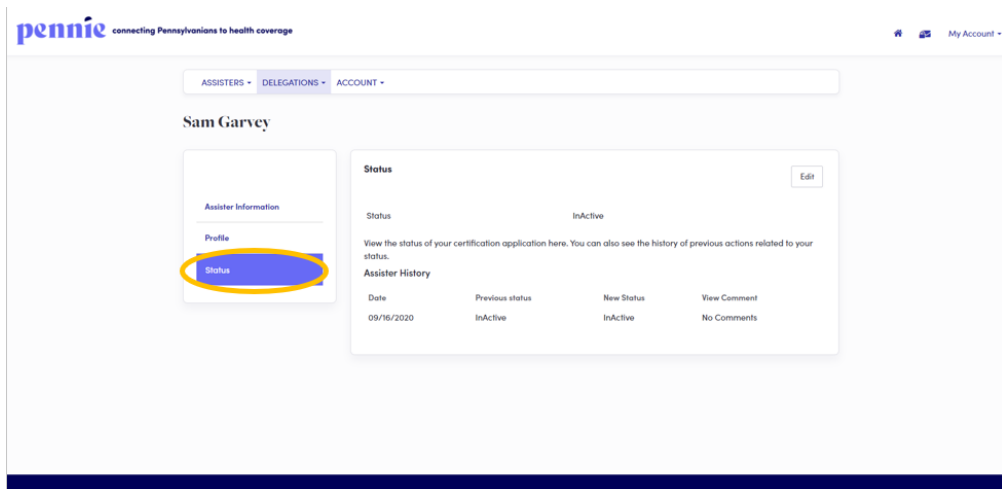
### 2.2.3 Update Certified Assister activity status

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



Name	Number of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/16/2021	InActive	Certified

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



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.

**pennie** connecting Pennsylvanians to health coverage

ASSISTERS • DELEGATIONS • ACCOUNT •

Sam Garvey

Assister Information

Profile

Status

Status

Active or Inactive

Status: InActive

New Status: Select

Comments

Cancel Save

Date	Previous status	New Status	View Comment
09/06/2020	InActive	InActive	No Comments

## 3. Certified Assisters



ASSISTERS • DELEGATIONS • ACCOUNT •

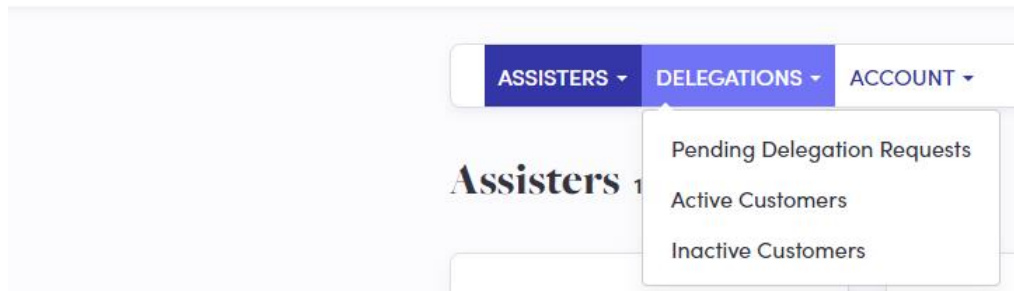
Manage Assisters

Assisters - Matching Assisters

### 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.


Name	Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/06/2021	InActive	Certified

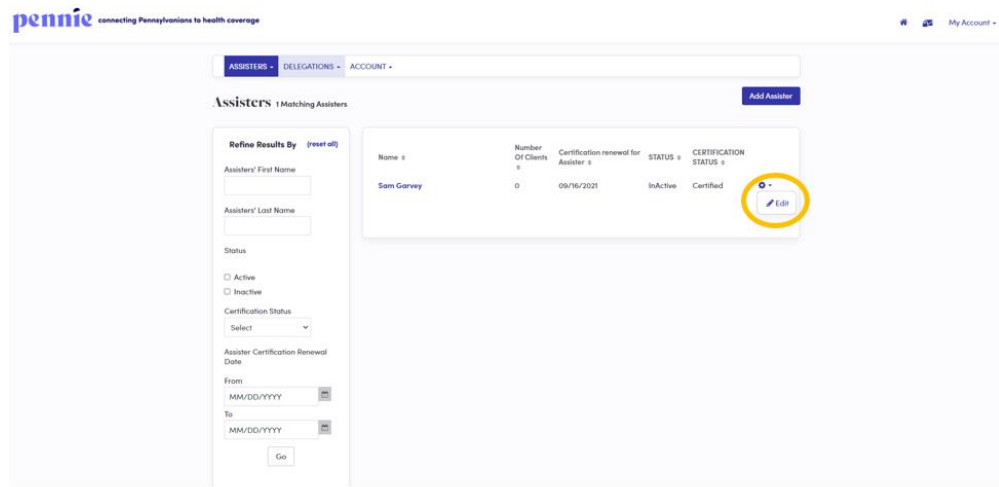
#### 4.1.2 Accept or decline individual delegation request

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

DELEGATIONS

- Pending Delegation Requests
- Active Customers
- Inactive Customers

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



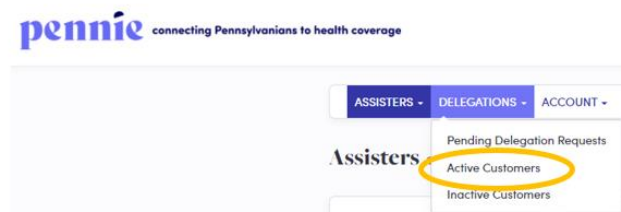
## 4.2 Active Customers (Existing Designations)

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'.



- 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.

The screenshot shows the 'Assisters' page in the pennie application. The 'Refine Results By' section is highlighted with a yellow circle. It contains the following fields:

- Assister's First Name
- Assister's Last Name
- Status: ☐ Active, ☐ InActive
- Certification Status: Select
- Assister Certification Renewal Date: From MM/DD/YYYY, To MM/DD/YYYY
- Go button (highlighted with a yellow circle)

To the right of the filters, a table displays the results:

Name	Number QIClients	Certification renewed for Assister	STATUS	CERTIFICATION STATUS
Sam Garvey	0	09/06/2021	InActive	Certified

#### 4.2.2 Change customer delegation from one Assister to another Assister

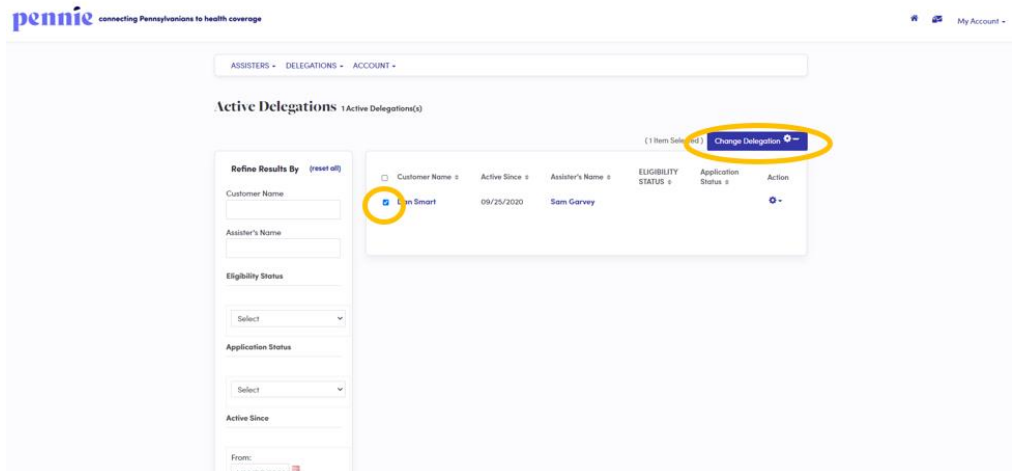
This section helps the Entity in changing a customer delegation from one Certified Assister to another within the Entity Organization. This step is performed when an Assister is no longer associated with the Entity organization.

- Step-1: Click on the ‘Delegations’ tab and select ‘Active Customer’.

The screenshot shows the 'Delegations' dropdown menu in the pennie application. The 'Active Customers' option is highlighted with a yellow circle. The menu also shows 'Pending Delegation Requests' and 'Inactive Customers'.

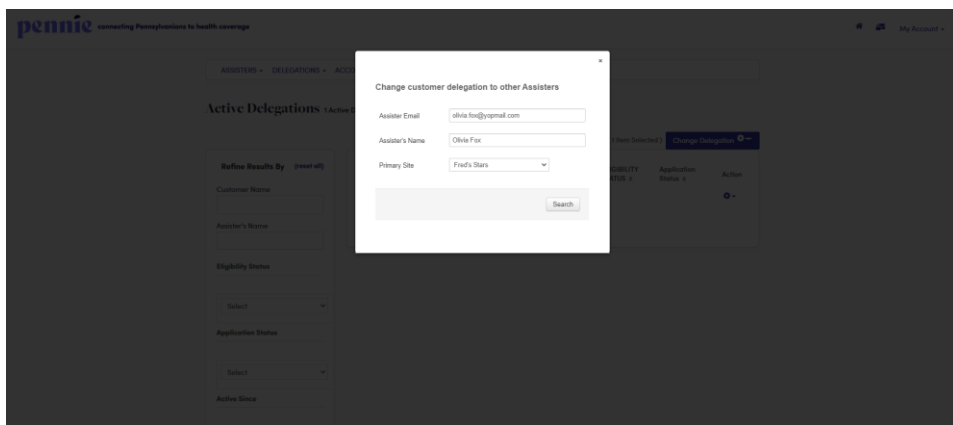
- Step-2: Select checkbox next to a customer’s name, click on the ‘Change Delegation’ button and select the ‘Change Delegation’.

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



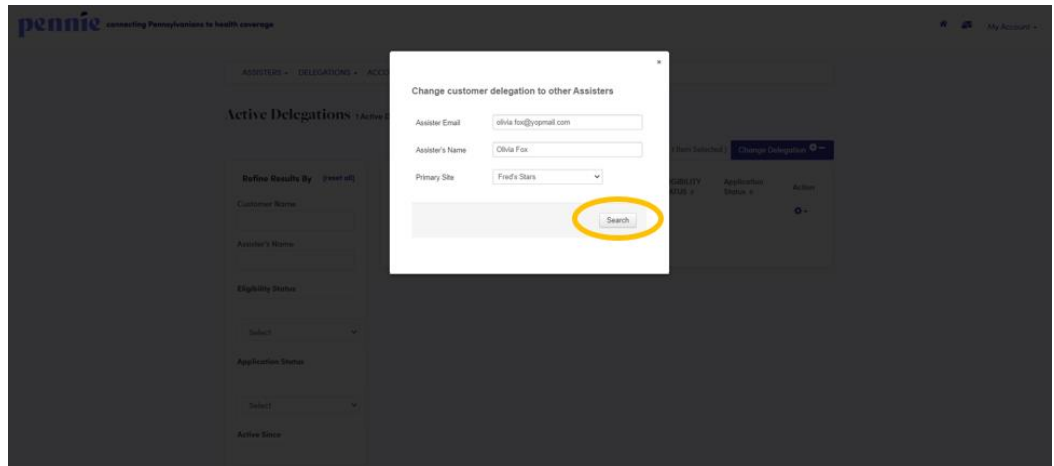
- Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

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

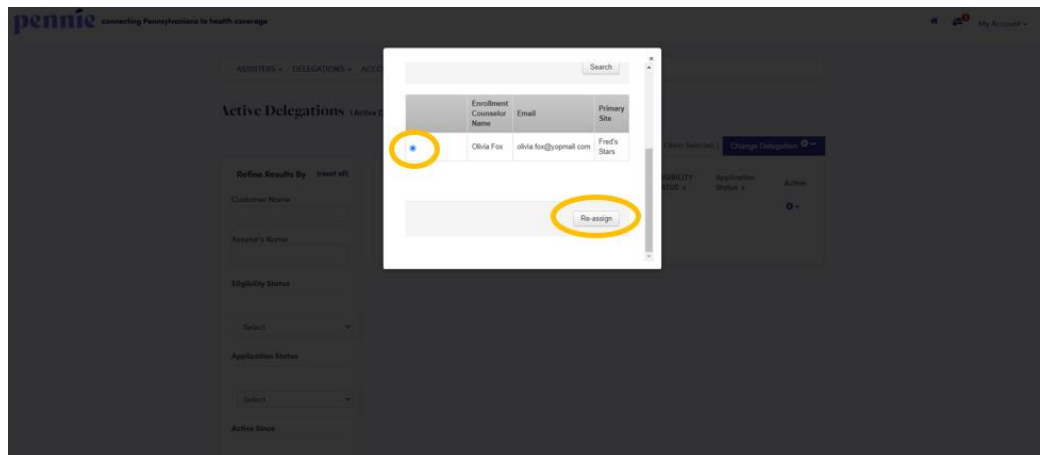




- If the Entity wants to see all the active Assisters present in the Entity organization, just click on the 'Search' button.

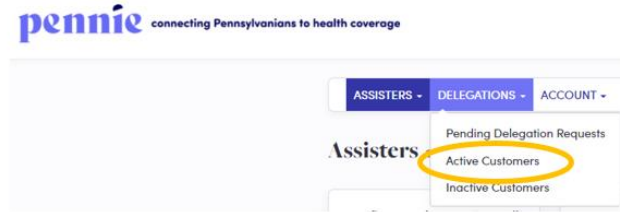


- Step-4: Scroll down and select an Assister that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.



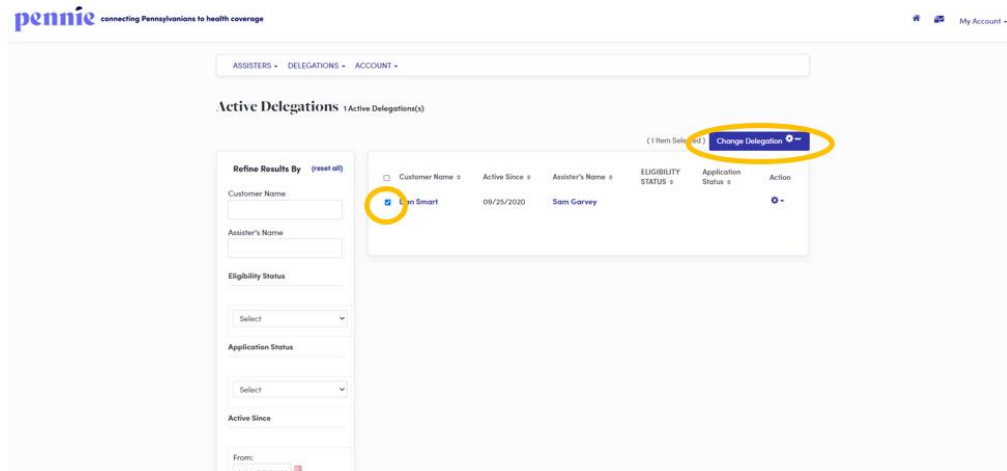
#### 4.2.3 Change multiple customer delegations from one Assister to another Assister

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



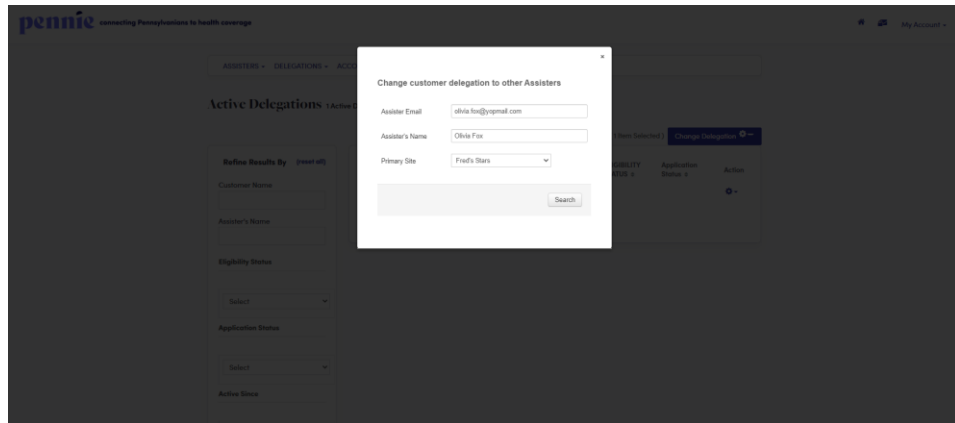
- Step-2: Select the main checkbox next to the 'Customer Name' title, click on the 'Change Delegation' button and select 'Change Delegation'.

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

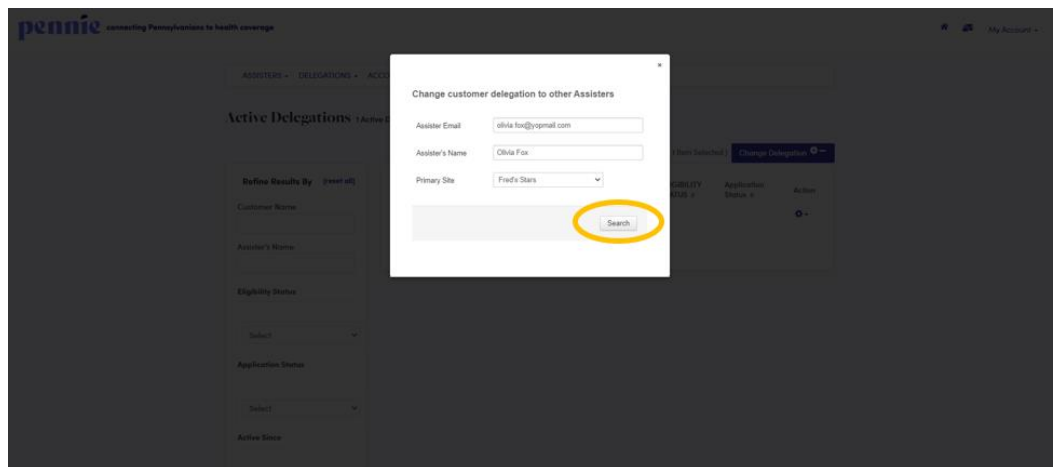


- Step-3: Enter Assister email in the 'Assister Email' field or Assister name in the 'Assister Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

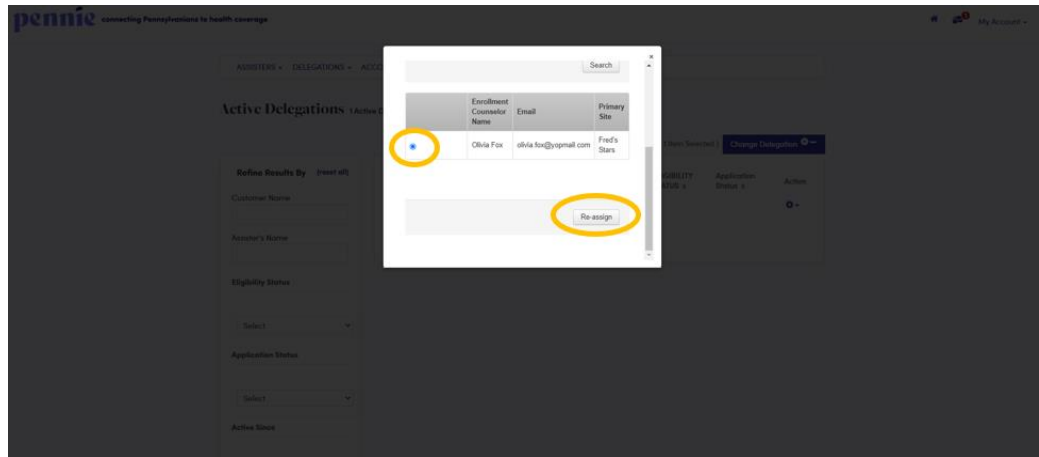
**PLEASE NOTE:** Only the Assisters with "Active" activity status will appear in the Assister search list.



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



- 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.



#### 4.2.4 Perform actions on customer profile

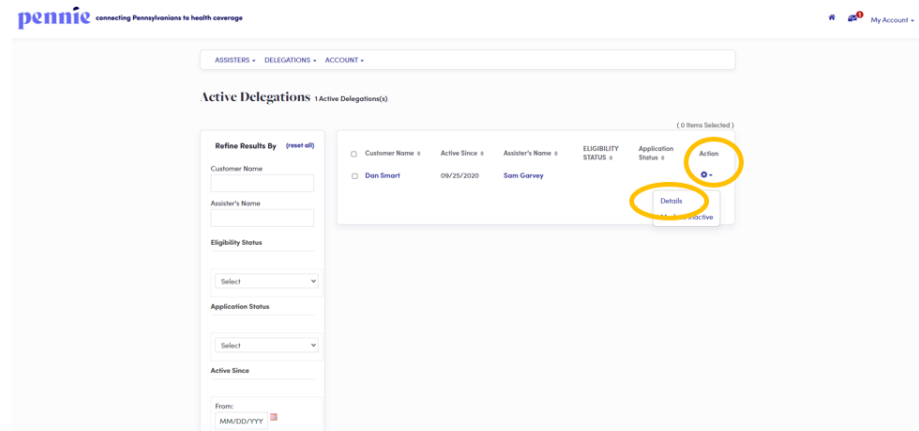
The Entities can perform actions on customer accounts which includes view customer summary, provide comments on a customer's profile, resend activation email to a customer and mark an individual as inactive.

##### 4.2.4.1 View individual summary

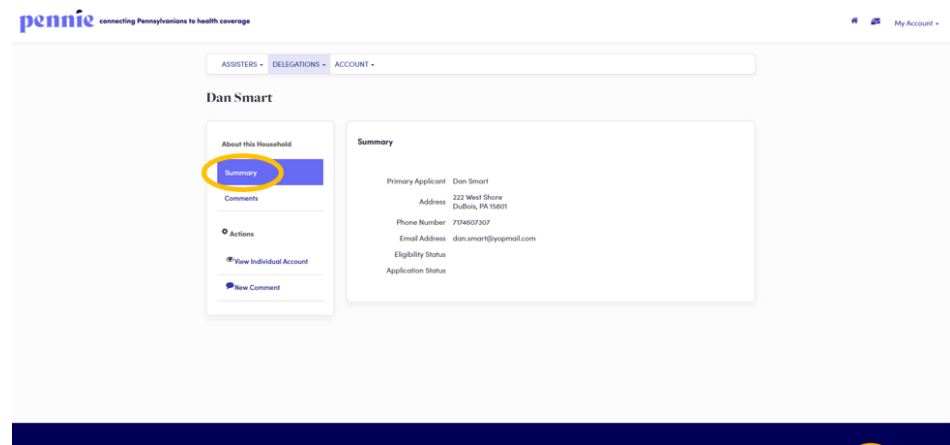
- Step-1: Click on the 'Delegations' tab and select 'Active Customer'.



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



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

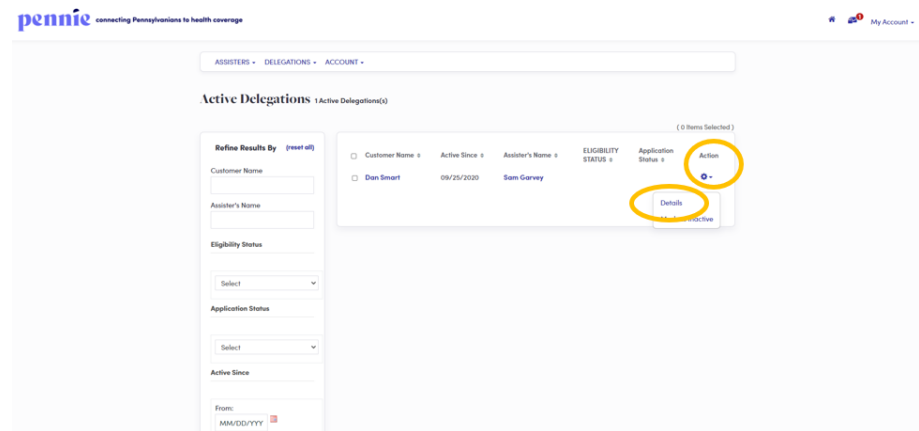


#### 4.2.4.2 Provide comments on individual profile

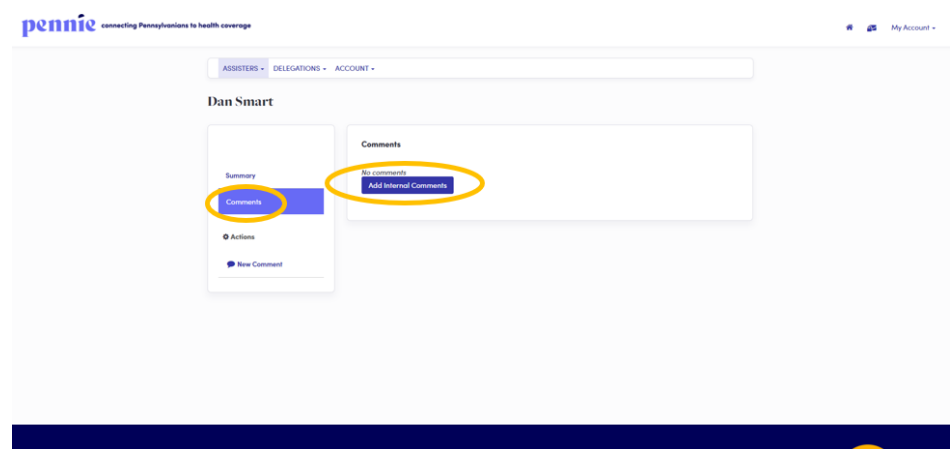
- Step-1: Click on the ‘Delegations’ tab and select ‘Active Customer’.



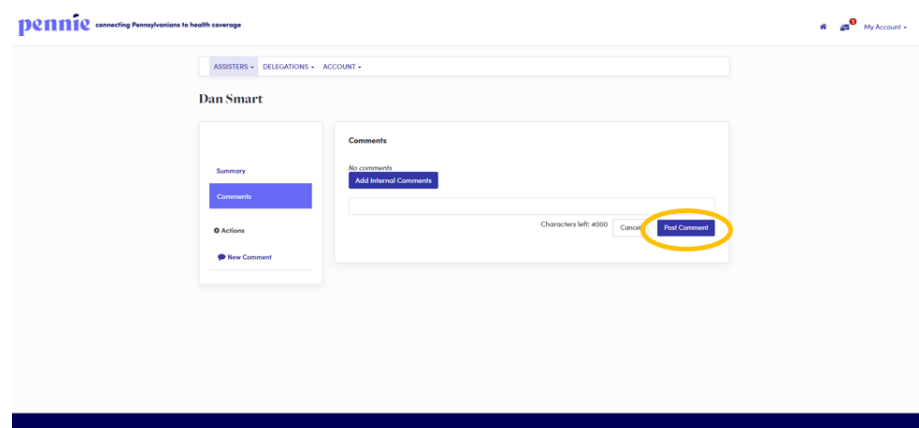
- Step-2: Click on the  button and click on ‘Details’.



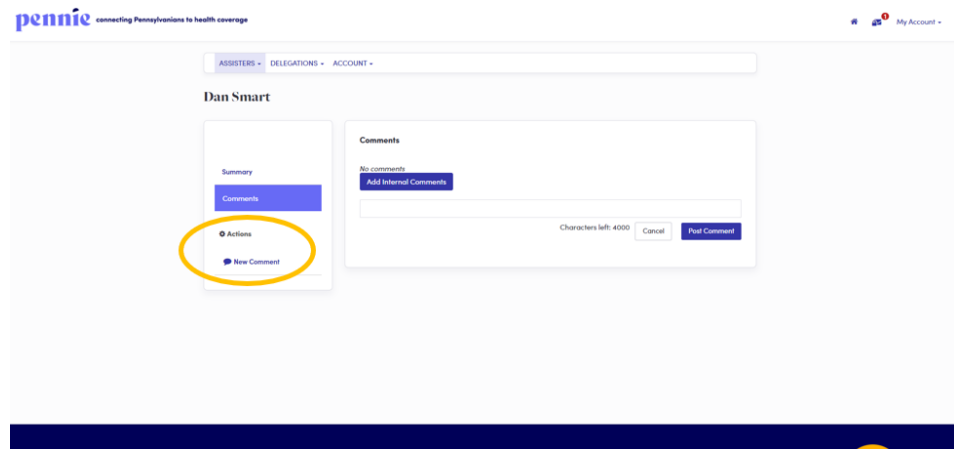
- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



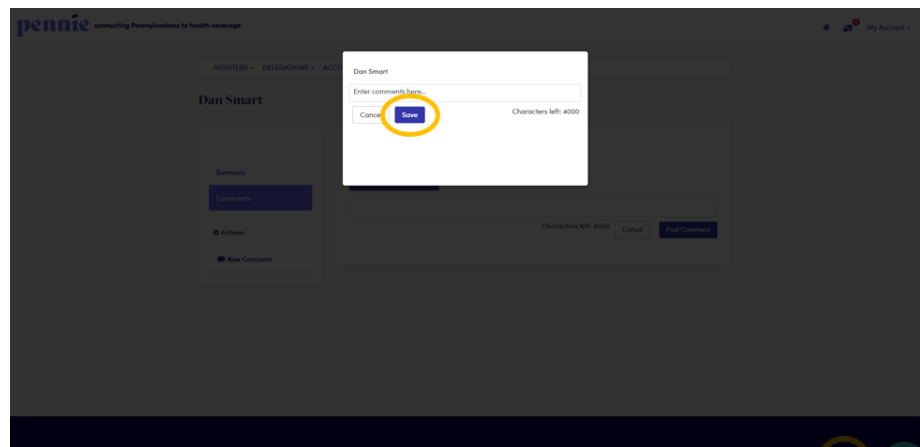
- Step-4: Provide comments in the text area and click on the ‘Post Comment’ button.



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



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

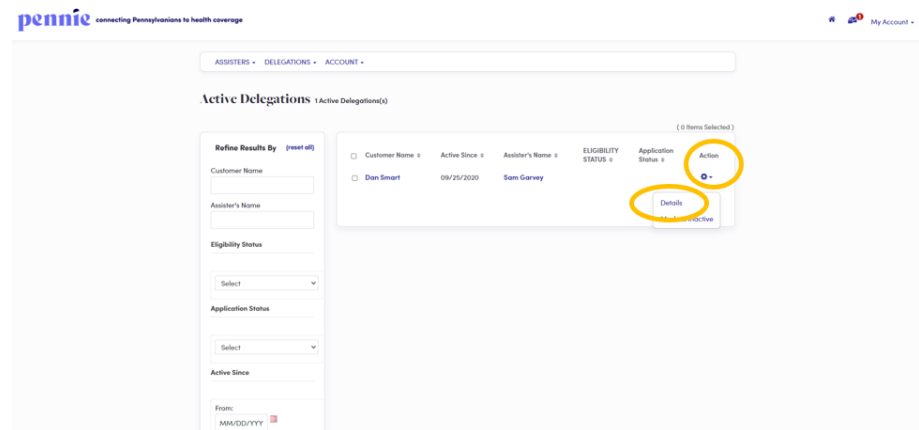


#### 4.2.4.3 Update comments on individual profile

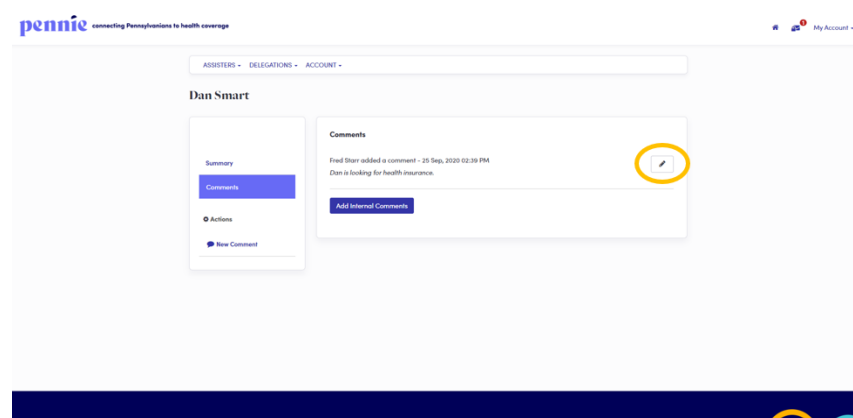
- Step-1: Click on the 'Delegations' tab and select 'Active Customers'.



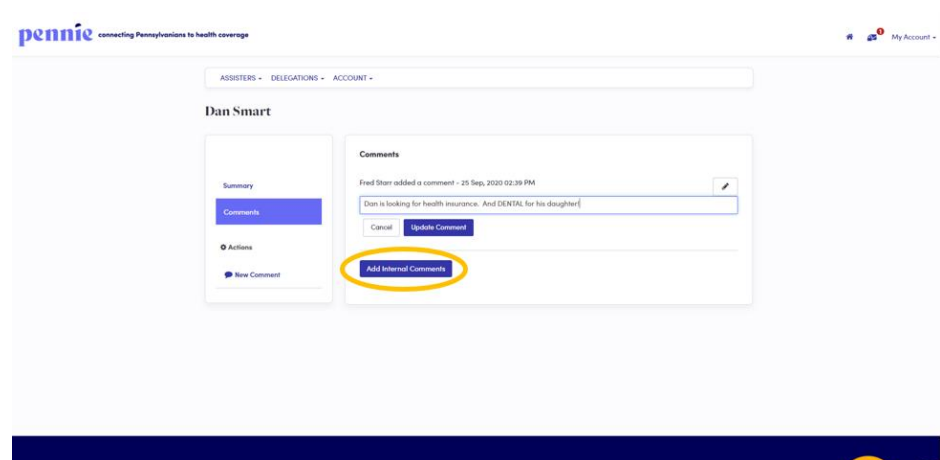
- Step-2: Click on the  button and click on 'Details'.



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



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





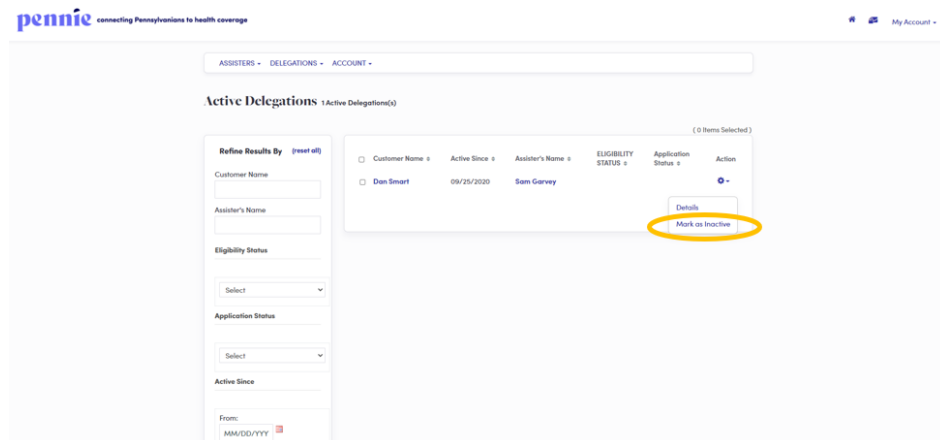
#### 4.2.5 Mark an individual as inactive

**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 Customer” section.

- Step-1: Click on the ‘Delegations’ tab and select ‘Active Customer’.

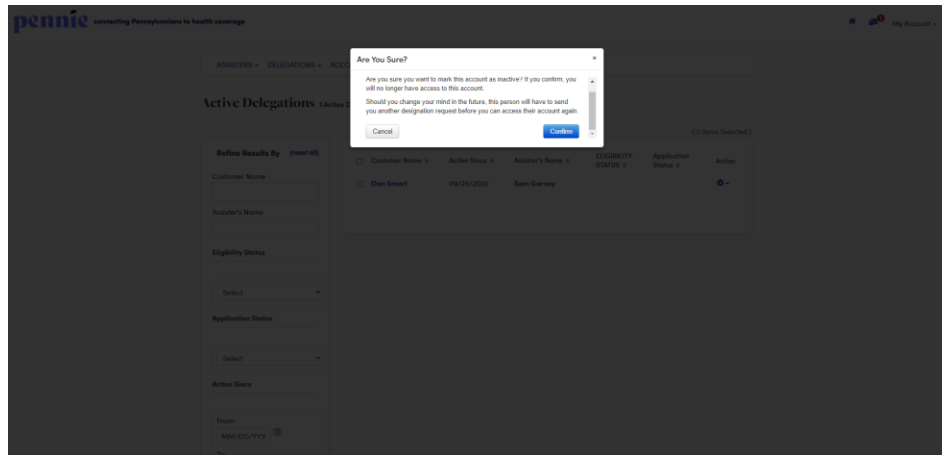


- Step-2: Click on the  button and click on ‘Mark as Inactive’.



- Step-3: A pop-up screen will appear. Click on ‘Confirm’ to inactivate 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.

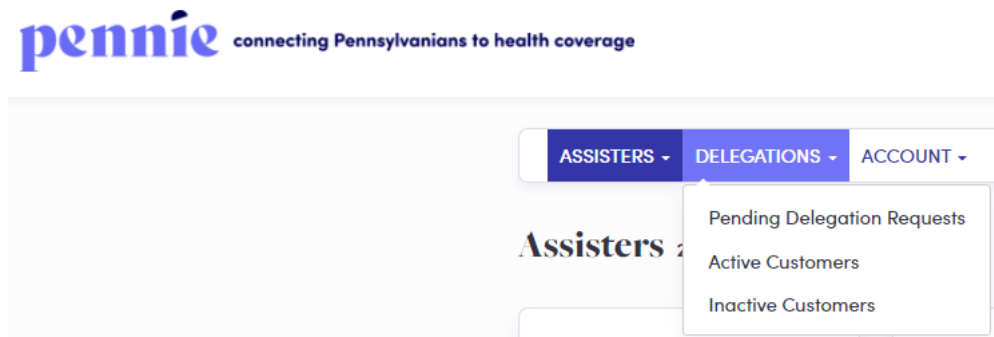


## 4.3 Inactive Customers (Undesignated Customers)

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 de-designated 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.

**Refine Results By** (reset all)

Customer Name:

Assister's Name:

Inactive Since:

From: MM/DD/YYYY

To: MM/DD/YYYY

**Go**

Customer Name	In-Active since	Assister's Name
Dan Smart	09/25/2020	Sam Garvey

## 5. Account

**ACCOUNT**

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Assisters
- Document Upload
- Registration Status

**Assisters** 2 Matching Assister

**Refine Results By** (reset all)

Assisters' First Name:

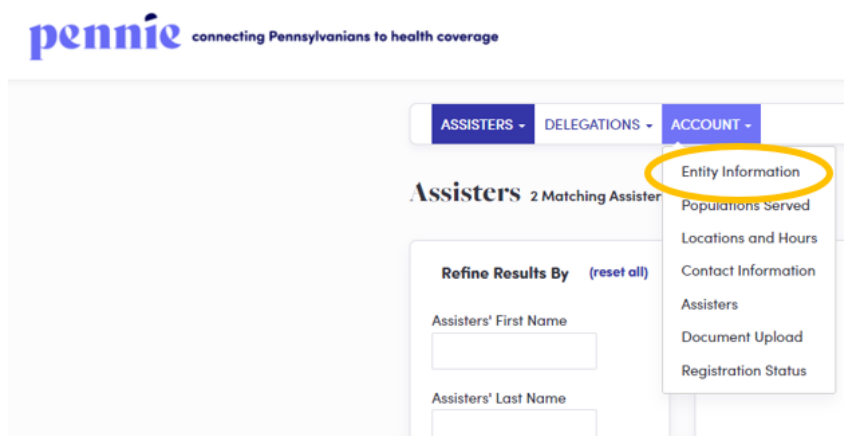
Assisters' Last Name:

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'.



- Step-2: Go to “Entity Information” section and click on the ‘Edit’ button.

- 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”.

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**Steps**

- Entity Information
- Declarations (New)
- Locations and Hours
- Contact Information
- Assisters
- Document Upload
- Payment Information
- Registration Status

**Step 1: Entity Information**

Entity Type: ☐ In-Person Assistance ☒ Certified Application Counselor ☐ Certified Application Counselor

Entity Name:

Business Name (Legal):

Primary Email Address:

Primary Phone Number:

Secondary Phone Number:

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

Fax:

Federal Tax ID:

State Tax ID:

Organization Type:

Countries Served:

Did your organization receive an Outreach and Education Grant? ☒ Yes ☐ No

## 5.2 Populations Served

### 5.2.1 Edit populations served information

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

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ASSISTERS 2 Matching Assistants

**Entity Information**

**Populations Served**

**Locations and Hours**

**Refine Results By** (reset all)

Assisters' First Name

Assisters' Last Name

Status

☐ Active ☐ Inactive

Certification Status

Assister Certification Renewal Date

From

To

Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
0	09/25/2021	Active	Certified
1	09/16/2021	Active	Certified

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

The screenshot shows the pennie web application interface. At the top, the logo "pennie" is followed by the tagline "connecting Pennsylvanians to health coverage". On the right, there are links for "My Account" and a user profile icon. Below the header, there are tabs for "ASSISTERS", "DELEGATIONS", and "ACCOUNT". The "ACCOUNT" tab is selected. On the left, a sidebar lists various steps: "Entity Information", "Populations Served" (highlighted in blue), "Locations and Hours", "Contact Information", "Assisters", "Document Upload", "Payment Information", and "Registration Status". The main content area is titled "Populations Served" and contains three sections: "Languages", "Ethnicities", and "Industries", each with a dropdown arrow. An "Edit" button is circled in yellow in the top right corner of the "Populations Served" section.

- 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.

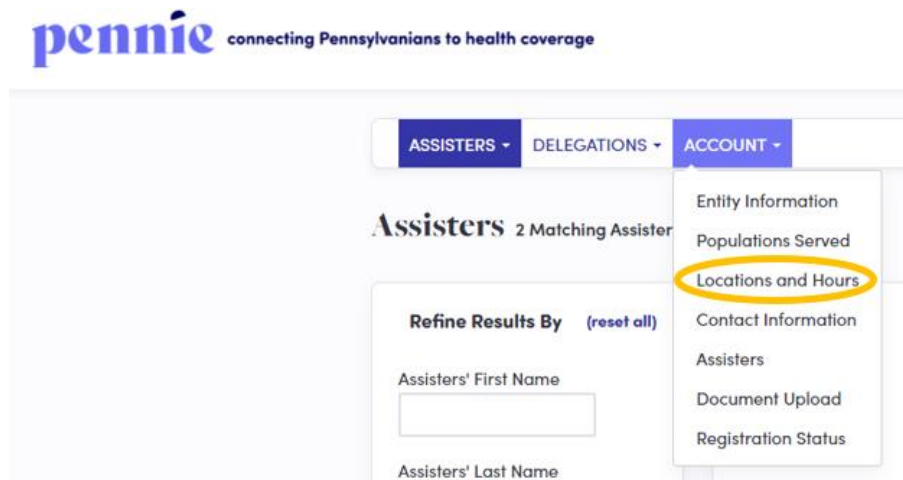
**PLEASE NOTE:** The total "Estimated Percent" value in each section must add up to 100%.

This screenshot shows the "Step 2: Populations Served" section of the pennie web application. The sidebar on the left is identical to the previous screenshot, with "Populations Served" highlighted. The main content area is titled "Step 2: Populations Served" and contains three sections: "Languages", "Ethnicities", and "Industries". Each section has a dropdown arrow and a text prompt: "Check all languages of your target population and specify percentages accordingly.", "Check all ethnicities of your target population and specify percentages accordingly.", and "Check all industries that apply, and provide percentages per industry." At the bottom of the "Industries" section, there are two buttons: "Cancel" and "Save". The "Save" button is circled in yellow.

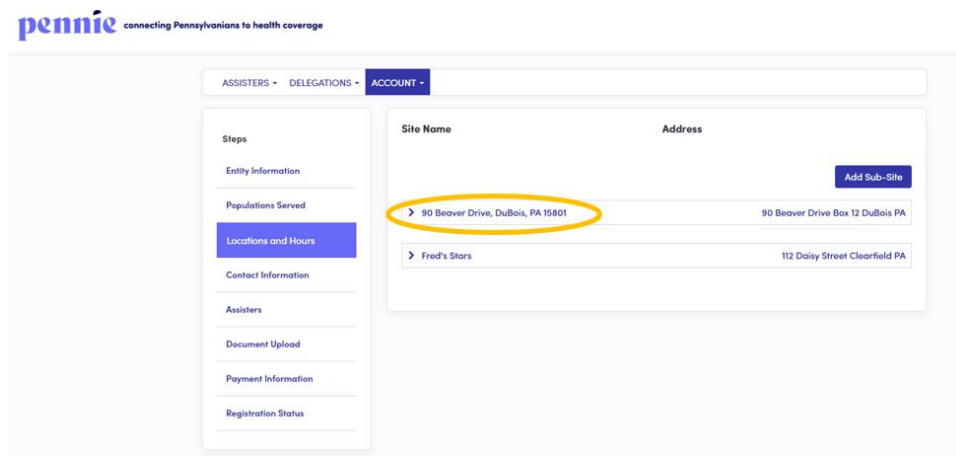
## 5.3 Location and Hours

### 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.



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

**Entity Information**

**Site Name:** All Beauty Salon, Dallas, TX 75201

**Address:** All Beauty Salon, Dallas, TX 75201

**Hours of Operation:**

Day	Open	Close
Monday	Closed	Closed
Tuesday	Closed	Closed
Wednesday	Closed	Closed
Thursday	Closed	Closed
Friday	10:00 am	10:00 pm
Saturday	10:00 am	10:00 pm
Sunday	10:00 am	10:00 pm

**Mailing Address:**

Address 1: All Beauty Salon  
Address 2: Dallas  
City: Dallas  
State: Texas  
Zip code: 75201

**Physical Address:**

Address 1:  
Address 2:  
City:  
State:  
Zip code:

**Languages Supported:**

Spoken Languages Supported: English, Spanish, Vietnamese, Vietnamese, Russian, Spanish  
Written Languages Supported: English, Spanish, Vietnamese, Spanish, Vietnamese, Chinese, Vietnamese

**Save**

- 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.

**Entity Information**

**Site Name:** All Beauty Salon, Dallas, TX 75201

**Address:** All Beauty Salon, Dallas, TX 75201

**Hours of Operation:**

Day	Open	Close
Monday	Closed	Closed
Tuesday	Closed	Closed
Wednesday	Closed	Closed
Thursday	Closed	Closed
Friday	10:00 am	10:00 pm
Saturday	10:00 am	10:00 pm
Sunday	10:00 am	10:00 pm

**Mailing Address:**

Address 1: All Beauty Salon  
Address 2: Dallas  
City: Dallas  
State: Texas  
Zip code: 75201

**Physical Address:**

Address 1:  
Address 2:  
City:  
State:  
Zip code:

**Languages Supported:**

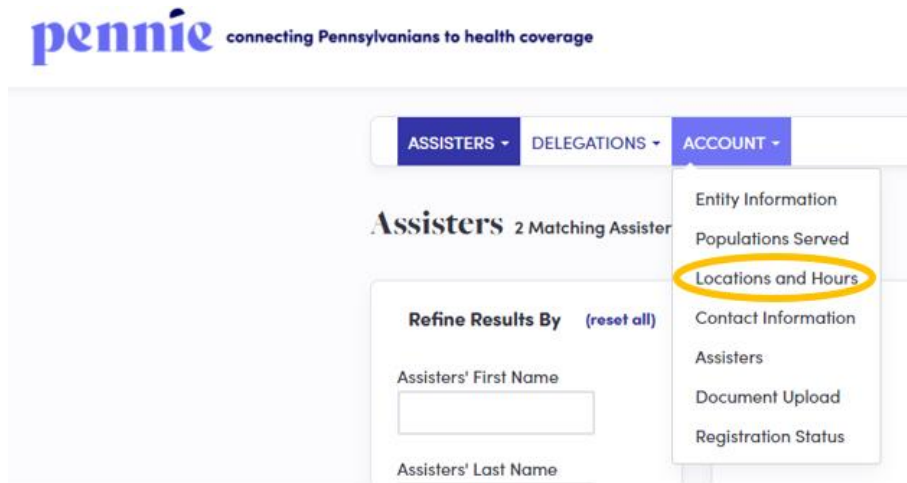
Spoken Languages Supported: English, Spanish, Vietnamese, Vietnamese, Russian, Spanish  
Written Languages Supported: English, Spanish, Vietnamese, Spanish, Vietnamese, Chinese, Vietnamese

**Save**

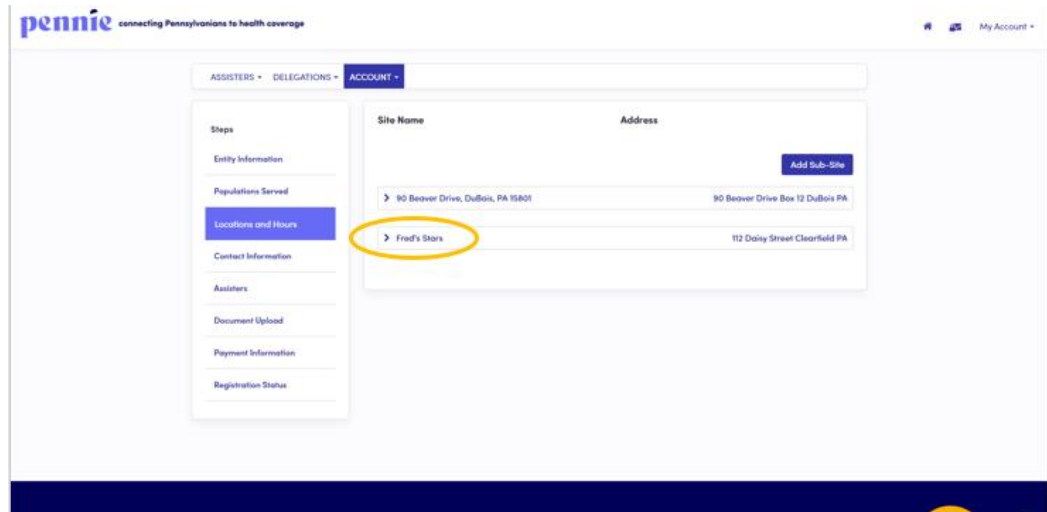


### 5.3.2 Edit Sub-Site information

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



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



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

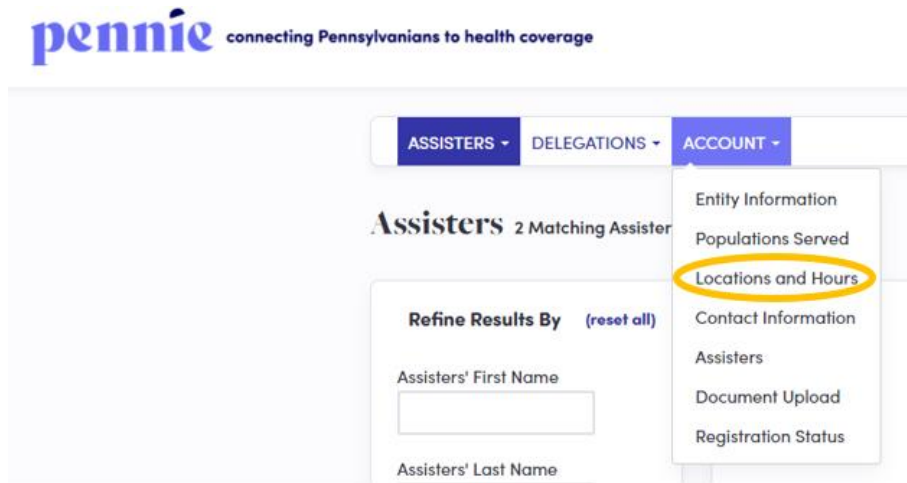
The screenshot shows the Pennie sub-site edit form. On the left is a sidebar with navigation links: Home, Entity Information, Registration Form, **Edit Sub-Site** (highlighted), Contact Information, Address, Personal Email, Payment Information, and Application Fees. The main form area is titled 'Edit Sub-Site' and contains several sections: 'Site Name' and 'Address' at the top, followed by 'Hours of Operation' with a table for days and times, 'Mailing Address', 'Physical Address', and 'Languages Supported'. A yellow circle highlights the 'Edit Sub-Site' button in the top right corner of the form.

- 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.

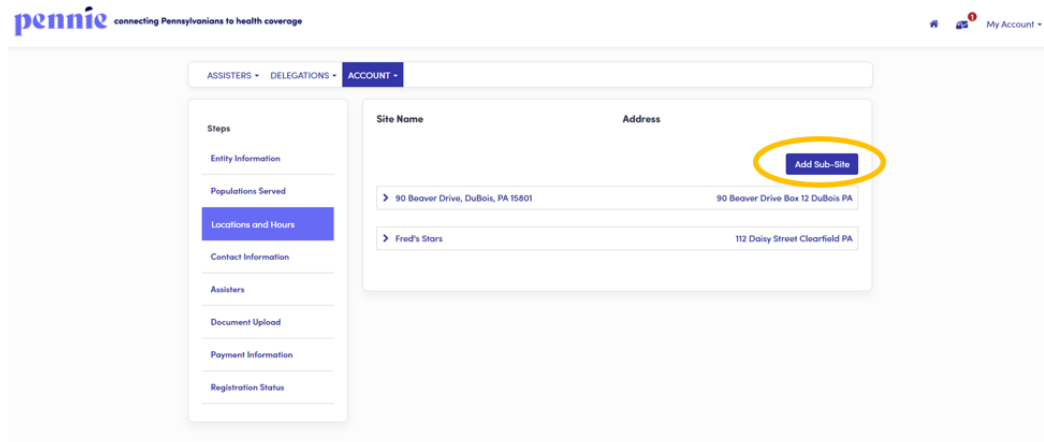
This screenshot shows the same Pennie sub-site edit form as the previous one, but with the 'Save Sub-Site' button highlighted with a yellow circle. The form fields for 'Hours of Operation', 'Mailing Address', 'Physical Address', and 'Languages Supported' are visible and appear to be filled out. The 'Save Sub-Site' button is located at the bottom right of the form.

### 5.3.3 Add sub-site information

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



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



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

The screenshot shows the 'Account' tab in the Pennie system. The left sidebar contains a menu with options: Home, Entity Information, Populations Served, Locations and Hours, Contact Information (highlighted), Assisters, Document Upload, Registration Status, and Assister Profile. The main content area is divided into sections: 'Basic Information' (City, State, Zip, Phone, Fax, Email), 'Contact Information' (Primary Contact, Secondary Contact, Tertiary Contact, each with Name, Title, Email, and Phone fields), 'Mailing Address' (Address 1, Address 2, City, State, Zip, Phone), 'Physical Address' (Address 1, Address 2, City, State, Zip, Phone), and 'Language Support' (Select all that apply, with a list of languages and a 'Select (Language) (Select all that apply)' button). A yellow circle highlights the 'Save' button at the bottom right.

## 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'.



The screenshot shows the 'Assisters' page in the Pennie system. The top navigation bar has three tabs: 'ASSISTERS', 'DELEGATIONS', and 'ACCOUNT' (highlighted). Below the tabs, the page title is 'Assisters 2 Matching Assister'. A 'Refine Results By (reset all)' button is visible. Below this, there are two input fields: 'Assisters' First Name' and 'Assisters' Last Name'. A dropdown menu is open from the 'ACCOUNT' tab, showing a list of options: Entity Information, Populations Served, Locations and Hours, Contact Information (highlighted with a yellow circle), Assisters, Document Upload, and Registration Status.

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

The screenshot shows the Pennie 'ACCOUNT' page. On the left, a sidebar lists steps: Entity Information, Populations Served, Locations and Hours, Contact Information (highlighted), Assistors, Document Upload, Payment Information, and Registration Status. The main content area is titled 'Primary Contact' and 'Financial Contact'. Both sections show fields for Name, Email, Primary Phone Number, Secondary Phone Number, and How would this person like to be contacted? (with a dropdown menu). The 'Edit' button in the top right corner of the Primary Contact section is circled in yellow.

- 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.

The screenshot shows the Pennie 'Step 4: Contact Information' form. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Step 4: Contact Information' and includes a sub-header 'Tell us about the contact people in your organization.' Below this, there are two sections: 'Primary Contact' and 'Financial Contact'. Each section has fields for Name, Email, Primary Phone Number, Secondary Phone Number, and a dropdown menu for 'How would this person like to be contacted?'. The 'Save' button at the bottom right of the Financial Contact section is circled in yellow.

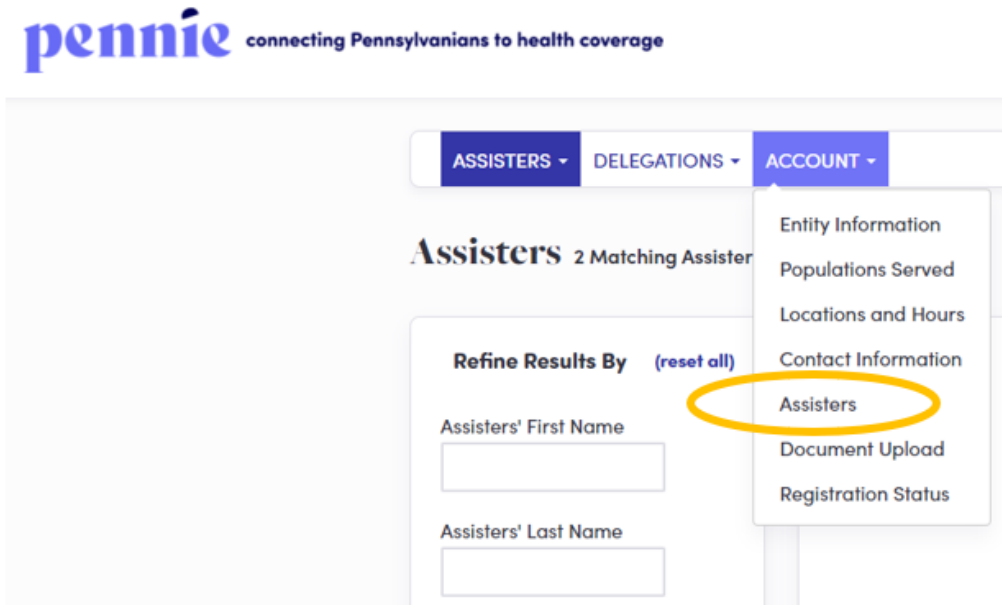
## 5.5 Assistors

### 5.5.1 Add an Assister

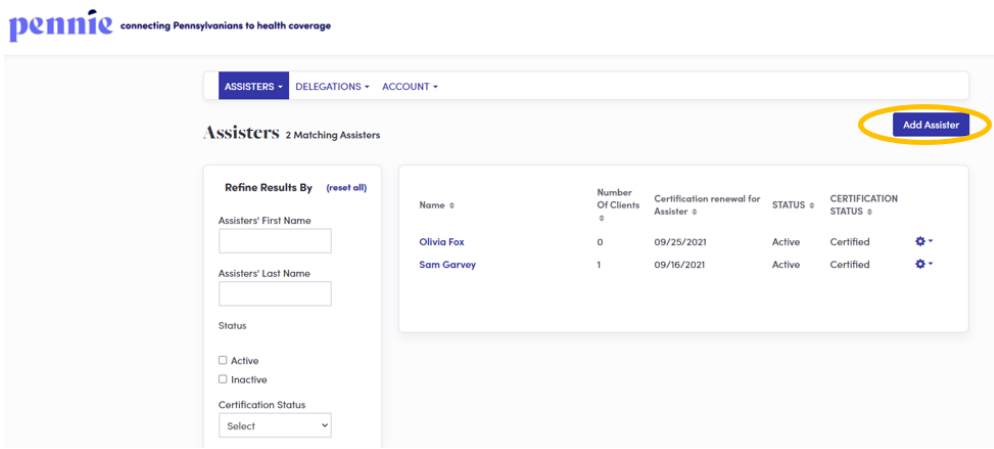
**PLEASE NOTE:** The Assister user accounts can be created at any time in the year, but the Assistors won't receive the invitation email to claim their account until Pennie

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’.



- Step-2: Click on the ‘Add Certified Assister’ button.



- 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.

**PLEASE NOTE:** 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).

The screenshot shows the 'New Assister Form' in the Pennie platform. It includes sections for 'Personal Information' (Name, Address, Phone, Email), 'Professional Information' (License, Board, Specialty), and 'Registration Information' (Assister Type, Assister Status). A yellow circle highlights the 'Is this Assister Certified?' dropdown menu, which is currently set to 'No'.

### 5.5.2 Add or update Certified Assister's information

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

The screenshot shows the 'Assisters' page in the Pennie platform. The 'ACCOUNT' tab is selected, and a dropdown menu is open showing options: 'Entity Information', 'Populations Served', 'Locations and Hours', 'Contact Information', 'Assisters' (highlighted with a yellow circle), 'Document Upload', and 'Registration Status'. Below the dropdown, there are search filters for 'Assisters' First Name' and 'Assisters' Last Name'.

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

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**Assisters** 2 Matching Assisters Add Assister

**Refine Results By** (reset all)

Assisters' First Name

Assisters' Last Name

Status  
☐ Active  
☐ Inactive

Certification Status:  
Select

Assister Certification Renewal Date

Name	Number Of Clients	Certification renewal for Assister	STATUS	CERTIFICATION STATUS
Olivia Fox	0	09/25/2021	Active	Certified
Sam Garvey	1	09/16/2021	Active	Certified

- 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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**Olivia Fox**

**Assister Information**

First Name:

Last Name:

Email:

Phone Number:

Secondary Phone Number:

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

Is this Assister Certified? ☒ No ☐ Yes

Assister Certification #

Primary Responder ID:

Secondary Responder ID:

**Mailing Address**

Street Address:

City:

State:

Zip Code:

**Profile Information**

Spoken Languages:

Written Languages:

Education:

Upload Photo:

**Assister Information**

First Name:

Last Name:

Email:

Phone Number:

Secondary Phone Number:

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

Is this Assister Certified? ☒ No ☐ Yes

Assister Certification #

Primary Responder ID:

Secondary Responder ID:

**Mailing Address**

Street Address:

City:

State:

Zip Code:

**Profile Information**

Spoken Languages:

Written Languages:

Education:

Upload Photo:



## 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:

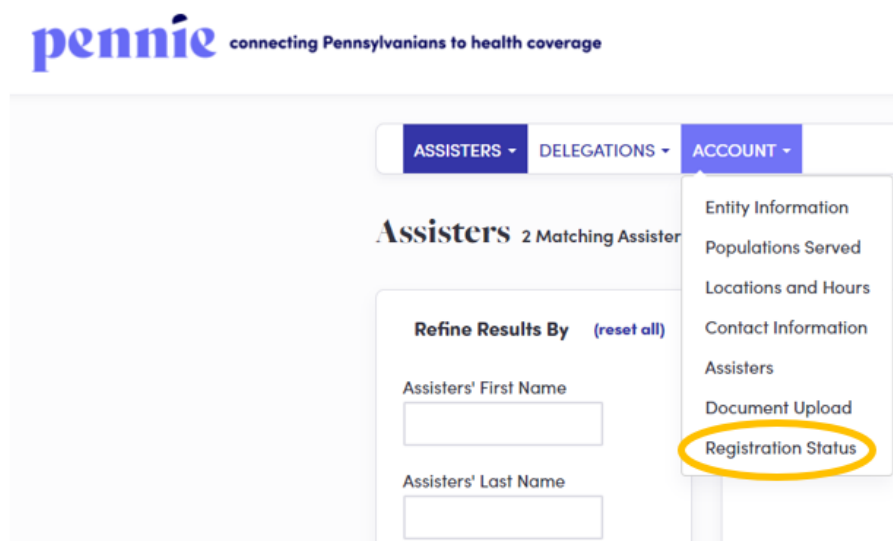
### **Pending**

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.

### **Active**

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’.



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

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ASSISTERS ▾ DELEGATIONS ▾ ACCOUNT ▾

### Joy Hands Assistors

Steps

Entity Information

Populations Served

Locations and Hours

Contact Information

Assistors

Document Upload

Payment Information

Registration Status

**Registration Status**

Entity Number 1000000035

Status Active

Registration Renewal Date 09-16-2021

**Registration History**

Date	Previous status	New Status	Comment
09/16/2020	Pending	Active	No Comments
09/16/2020	Incomplete	Pending	No Comments

## Document Revision History

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