



How to establish a Broker/Agent Profile



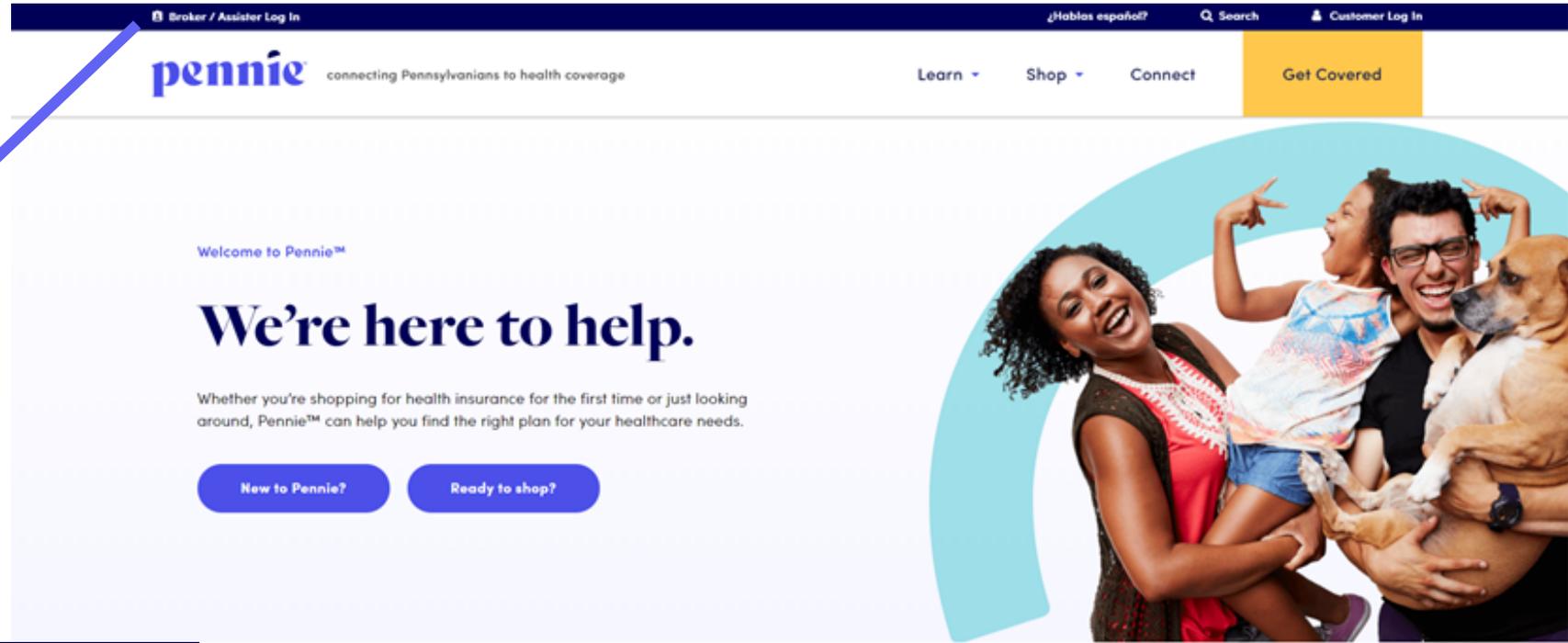
Multi-factor Authentication

- There are two stages of multi-factor authentication in claiming your Pennie account

1) Multi-factor authentication is required by Pennie to claim a broker account. **Note: It is highly recommended that you utilize a telephone number that directly connects to your phone (direct phone without IVR; or mobile device)**

2) For customer security, Pennie highly recommends the use of Duo Mobile app as the primary means of multi-factor authentication. [Click here for a how-to guide](#)

Broker Login



Broker / Assister Log In

pennie connecting Pennsylvanians to health coverage

Setting Up Your Broker Account

Broker/Assister Account Login

Do you already have a Pennie account? *

No



I need to create an account and: *

I am a Broker with an Agency



Submit



Setting Up Your Broker Account

- If you a member of an agency, you will receive this alert

I am a member of an agency...what now?

If you are a member of an agency, your account will need to be created by your Agency Manager (sometimes referred to as the Principal):

Contact your Agency Manager to add yourself to the agency account

Once added to the account, an email notification will be sent to you with a secure link to log in and claim your account under your agency

If your agency is not already set up in Pennie, an Agency Manager will need to be established in order for you and other brokers to be set up within the agency.

Setting Up Your Broker Account

- Once your agency manager adds you to the agency and sends you your account claiming link, continue to the next slide

Your Producer Profile



New Agent Account Set-Up

All fields on this form marked with an asterisk (*) are required.

Basic Information

First Name *

Last Name *

Email Address *

Confirm Email Address *

Phone Number *

Security Question

Security Question *

Set Password

Password *

Confirm Password *

I have read and agree to the Privacy Policy

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

Click "Submit" to proceed.



Your Producer Profile

New Agent Registration

Steps

1. Agent Information

2. Profile

New producers to Pennie have two steps to claiming their Pennie Producer Account:

- 1) Review and complete Agent Information
- 2) Review and complete their Pennie public Profile.

Your Producer Profile



New Agent Registration

- Steps
- 1. Agent Information
 - 2. Profile

Agent Information

Provide the following information so we can certify you to make your services available on Pennsylvania. After a quick review, we'll send you an email letting you know when your application has been approved.

First Name*

Last Name*

Pennsylvania Agent License Number* (Not your NPN)

Agent NPN*

License Renewal Date*

Individual Email*

Primary contact number*

Business Contact Phone Number

Alternate Phone Number

Fax Number

Preferred Method of Communication*

Business Name*

Federal Employer Identification Number (EIN)* What if I don't have an EIN?

Business Address

Address line 1*

Address line 2

City*

State*

Zip code*

Correspondence Address

Same as business address

Address line 1*

Address line 2

City*

State*

Zip code*

Federal Employer ID Number (EIN)

An EIN is required to apply for registration on Pennie. If you are part of an agency than you may also use your Agency's EIN.

[Get an EIN Now](#)

Close

Producer will verify:

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

Click "Next" to proceed.



Your Producer Profile



New Agent Registration

Steps

- ✓ Agent Information
- 2. Profile**

Step 2: Profile

Provide information about you and your business for your public profile. This information will be viewed by Pennie users looking for agents on exchange. The more information you provide, the more they're likely to contact you.

Clients Served Individuals / Families

Languages

- Product Expertise
- Health
 - Dental
 - Vision
 - Life
 - Medicare
 - Workers Compensation
 - Property/Casualty

Your Website Address

Your Public Email

Education

About Me

Upload Photo feagaergh.jpg

You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

Provide information relevant to your Pennie public profile:

- Languages Spoken
- Product Expertise
- Website, Email Address, Education, and Photo.

Click "Finish" to complete the account claiming process.

Account Registration Complete ✕

You have completed the Agent application process.

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

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

pennie

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