pennie®

Agency & Agency Manager Account Creation Guide

Overview

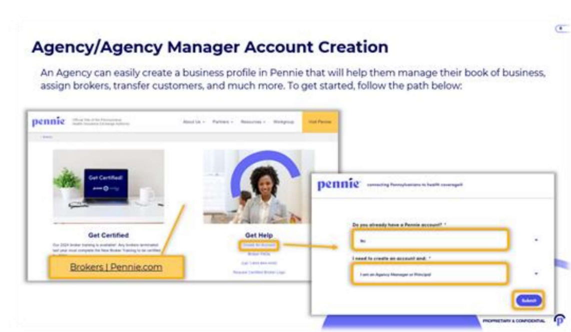
Pennie uses a modern and proven technology platform trusted by State-based Marketplaces across the country. While the platform offers customers tools to apply, shop, compare, and enroll in comprehensive health and dental coverage, there are also tools available specifically designed for brokers to assist in serving and managing customers.

This guide will review the steps needed to create an **Agency and Agency Manager account**. For assistance creating an **Agent (Broker) Account**, please refer to our **Agent (Broker) Account Claiming Guide**.

Jump to:

Account types

Account creation



Which account type is right for you?

Pennie accounts are designed to help you and your business serve Pennsylvania customers. You will want to register for the account that best fits your business and situation.

Agency/Agency Manager Accounts are for:

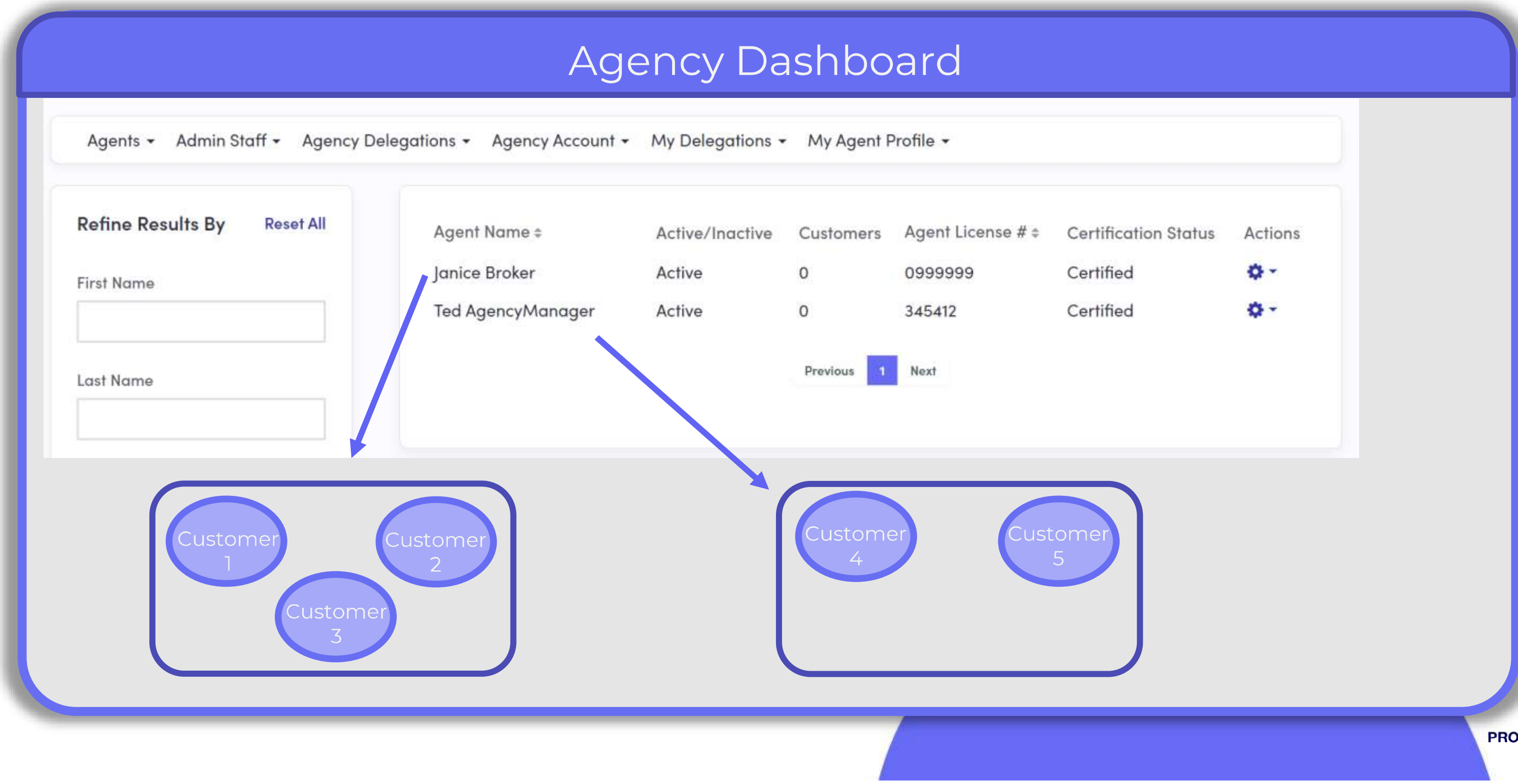
- Brokers who work on their own outside a multi-broker agency
- Supervisors/managers of agencies with two or more brokers
- Supervisors/managers of an insurance organization, *or*
- Supervisors/managers of broker call centers

Agent/Broker Accounts are for Individual agents who work within/are:

- A brokerage agency amongst other brokers
- Call centers
- Insurance organizations ("Captive" agents), *or*
- Agents that are not a manager or supervisor

Which account type is right for you?

If you oversee multiple brokers that all work for the same agency, you will want to register as an **Agency Manager**. In the process of creating your account, you will also create an **Agency** account for the business. Through the additional features of the Agency Manager and Agency accounts, you can manage the brokers of the agency and collaborate on behalf of their customers.



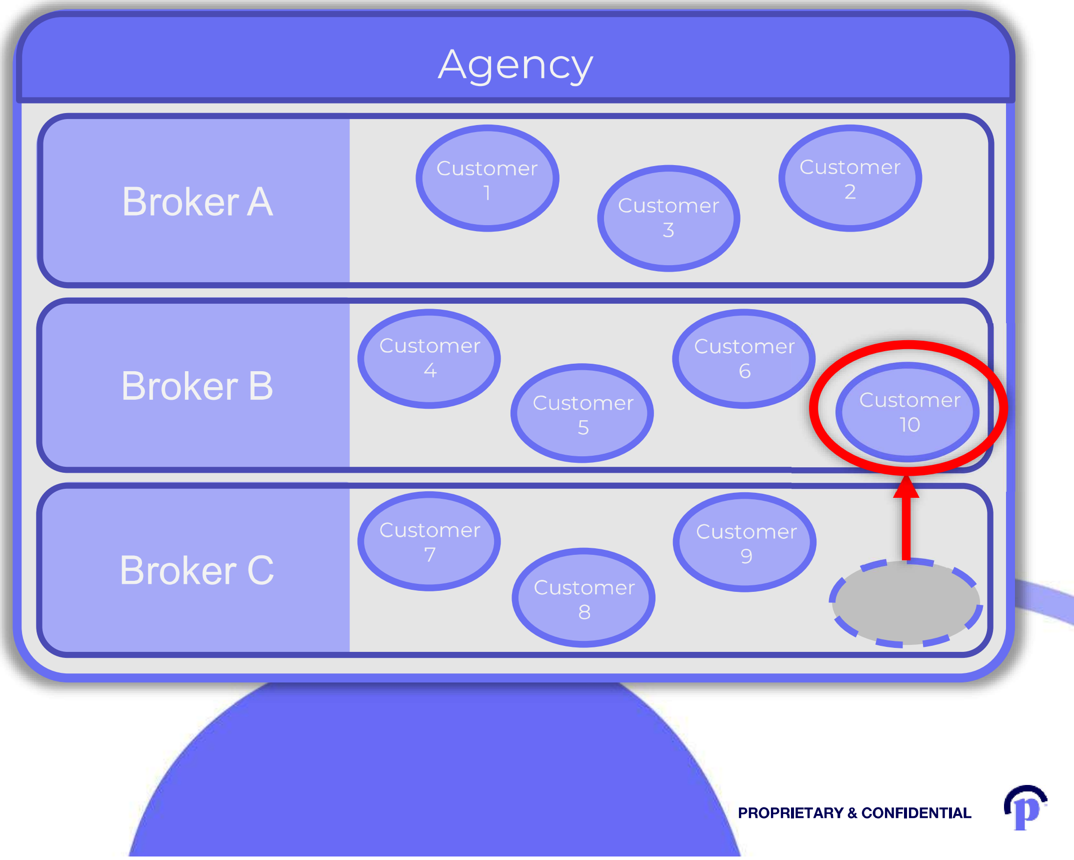
Which account type is right for you?

Those with an Agency Manager account can:

- Re-assign customers to another broker within the agency
- Act on behalf of brokers within the agency (and their customers), including:

1. Accepting new clients
2. Viewing statuses of current clients
3. Acting on behalf of current clients, *and*
4. Processing paper applications on behalf of a broker

→ <u>Note</u>: Customers are notified of any changes



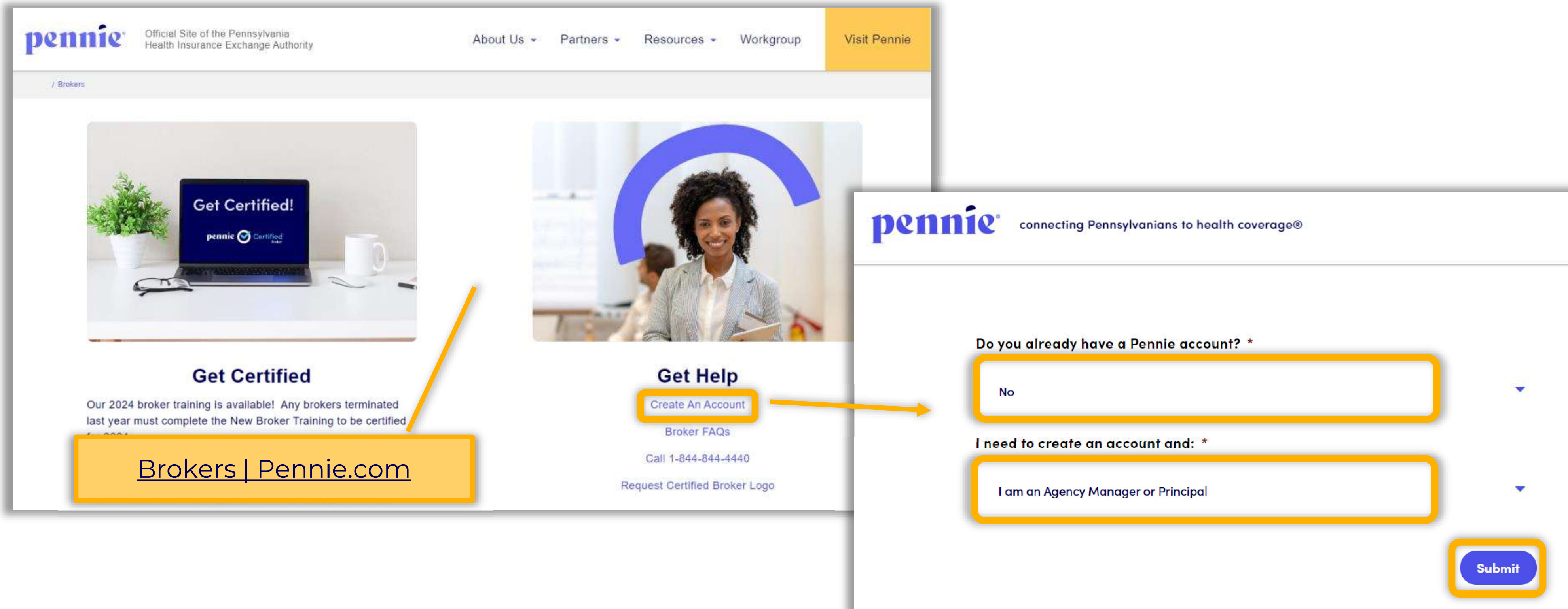
What tools are inside the Agency/Agency Manager Portal?

What can you do with your Pennie Agency/Agency Manager Portal?

1. Easily add brokers to your agency
2. Accept pending customer delegations
3. Easily assign or re-assign customers to other agents when necessary
4. Manage current customers and see their current application status
5. Manage current customers' Data Matching Inconsistencies (DMI) requests or tickets
6. Process an application on your customer's behalf
7. Manage the Agency profile information
8. Manage your Broker profile information, *and*
9. View and export the Book of Business for a single Broker, or the entire Agency

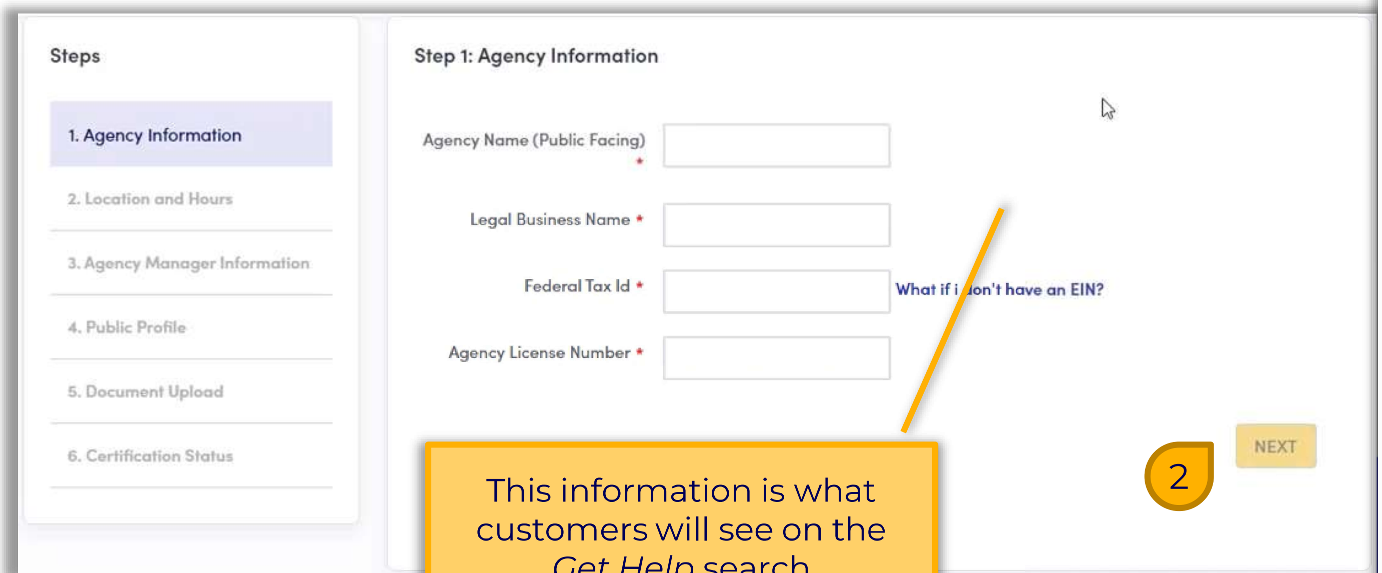
Agency/Agency Manager Account Creation

An Agency can easily create a business profile in Pennie that will help them manage their book of business, assign brokers, transfer customers, and much more. To get started, follow the path below:

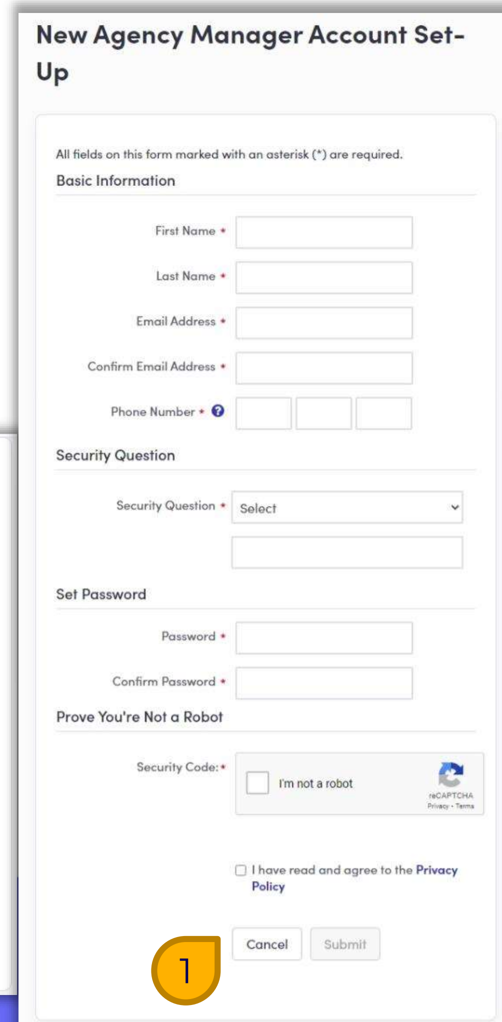


Agency/Agency Manager Account Creation

For simplicity, Pennie combines the creation of the Agency Account with the creation of an Agency Manager Account. A primary Account Manager may be an agency principal, a company designate, or another individual with the responsibility of managing their organization's Pennie account and activity.

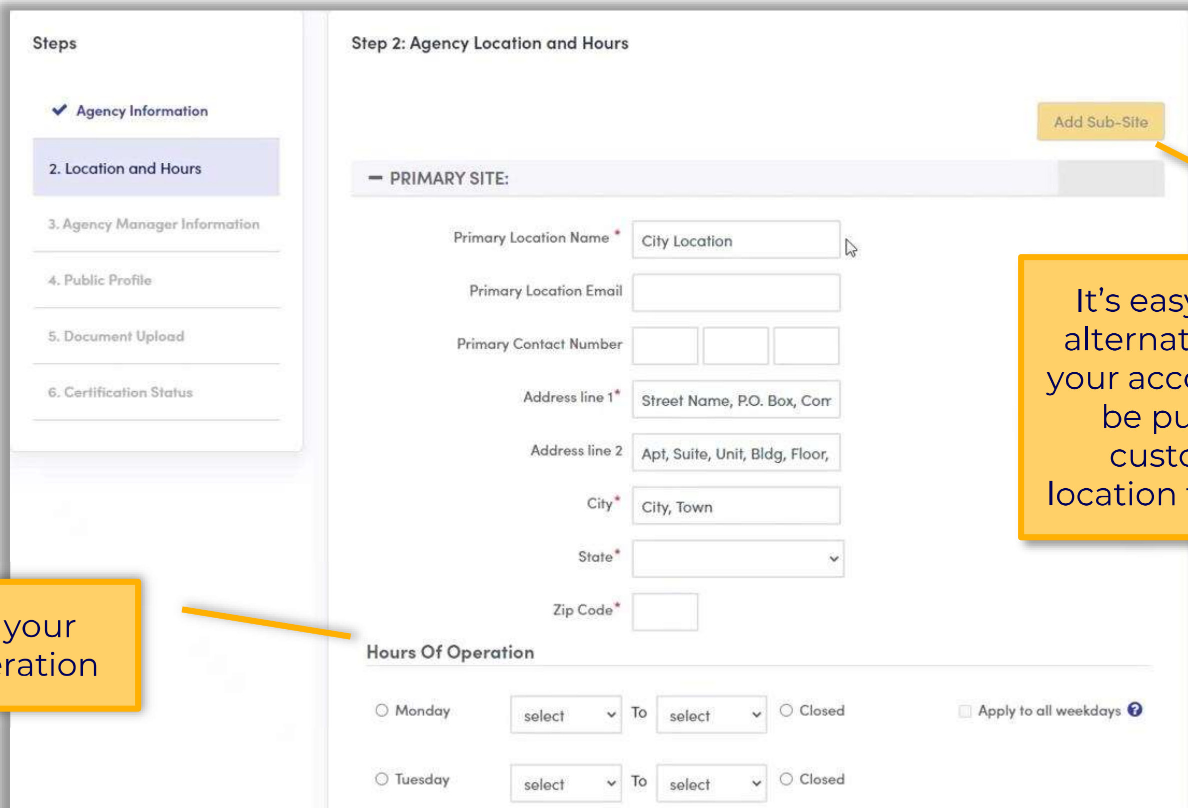


This information is what customers will see on the *Get Help* search



Agency/Agency Manager Account Creation

At this stage of the Agency Account creation, please ensure that all business information is accurate and current:

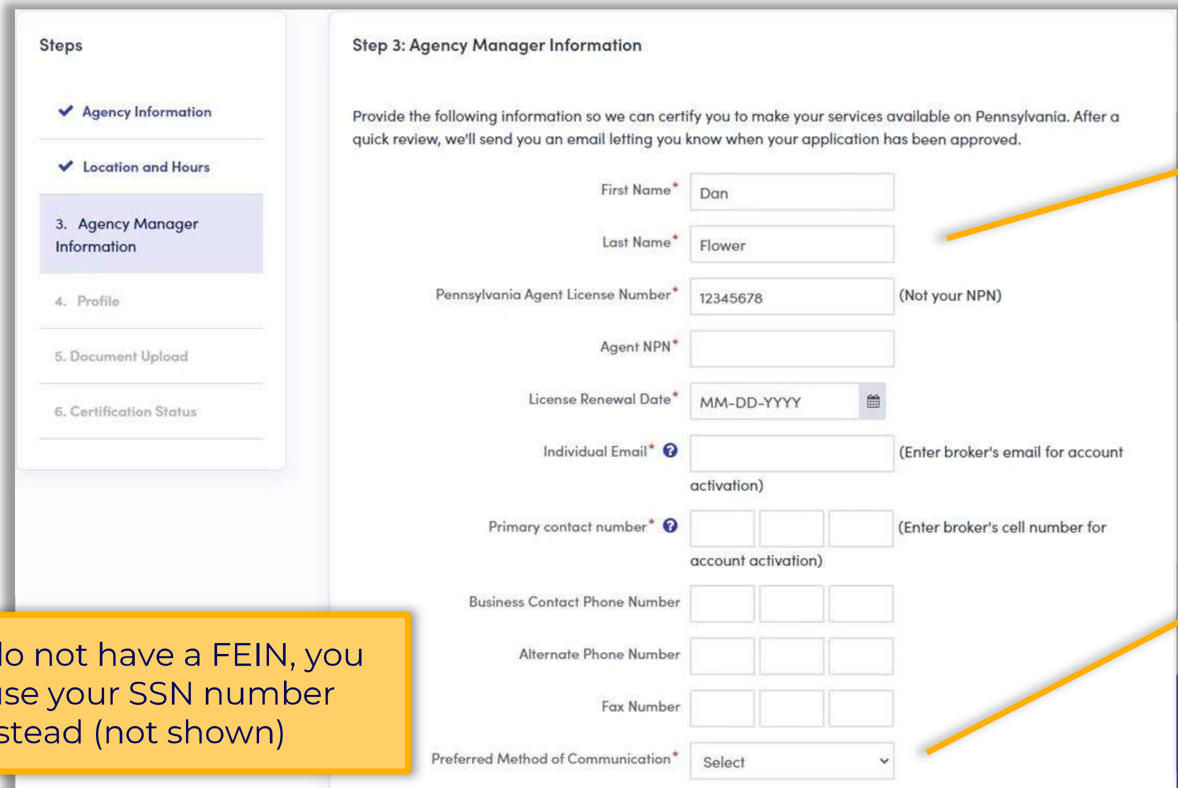


It's easy to add "sub-sites" – alternate office locations – to your account profile. These will be public-facing so your customers can find the location that is closest to them

You can also display your Agency's hours of operation

Agency/Agency Manager Account Creation

In the process of creating the Agency account, an Agency Manager account is simultaneously created:



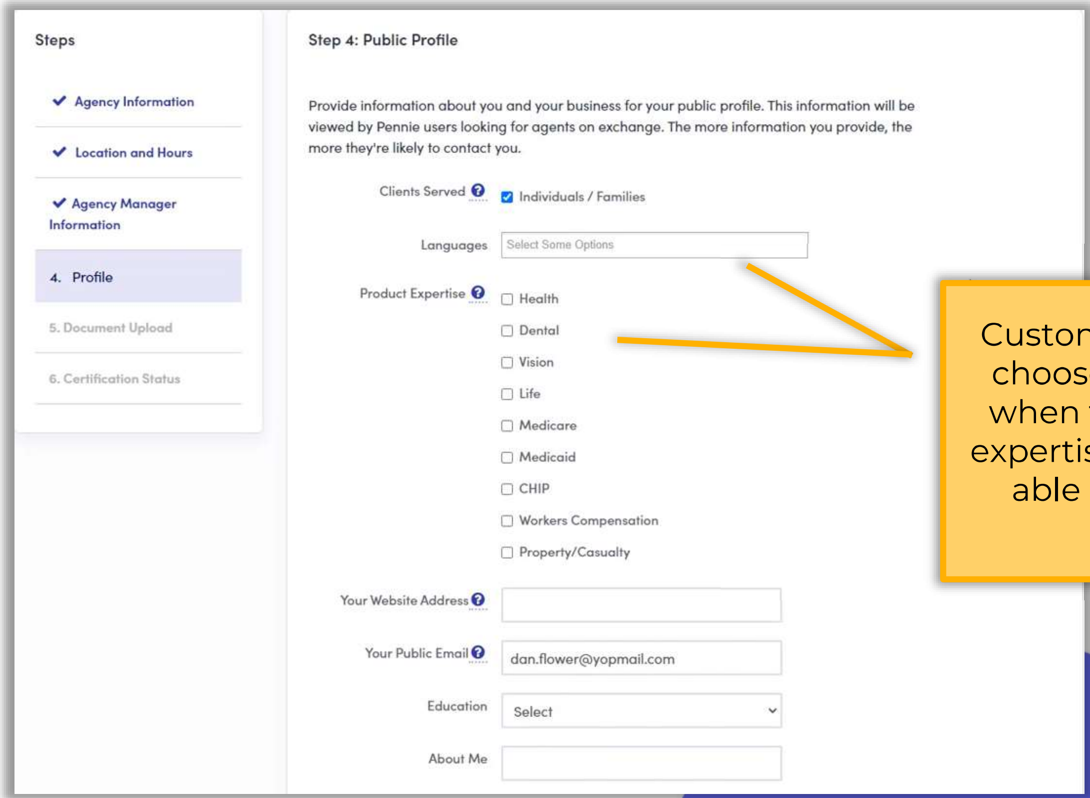
Your name, contact information, and NPN will be available for customers to see in your public Pennie profile

If you do not have a FEIN, you can use your SSN number instead (not shown)

Method you prefer customers to communicate with you (phone vs. email)

Agency/Agency Manager Account Creation

An important component to your Pennie Agency profile is an accurate portrayal of your agency's product expertise, the agency's public website, and a thoughtful, customer-facing description to help engage customers:



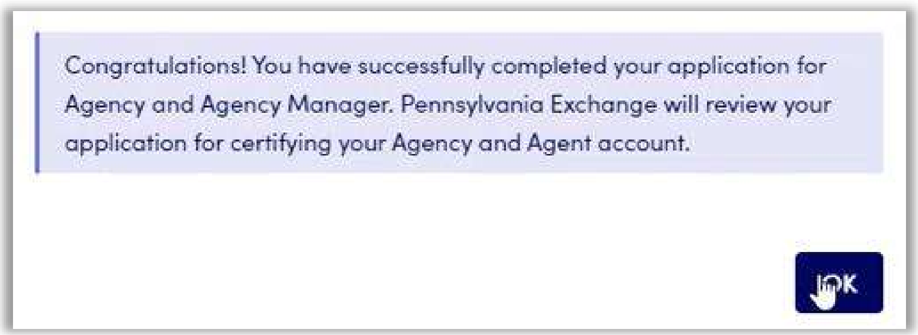
Customers will be able to better choose a broker to assist them when they know what product expertise you have, and if you are able to speak any additional languages

Agency/Agency Manager Account Creation

Once your Pennie Agency profile has been created, a system notification will inform you of the Pennie review and approval process.

Note: Because Agency Managers function as a broker with additional system capabilities, they must also:

1. Be licensed by the PA Insurance Department with a Health line of authority, *and*
2. Complete Pennie's Broker Certification Training



A video walkthrough of how to create a new Agency Manager account can be found on Pennie's YouTube page: Claiming Agency Management Account | YouTube – PenniePA.

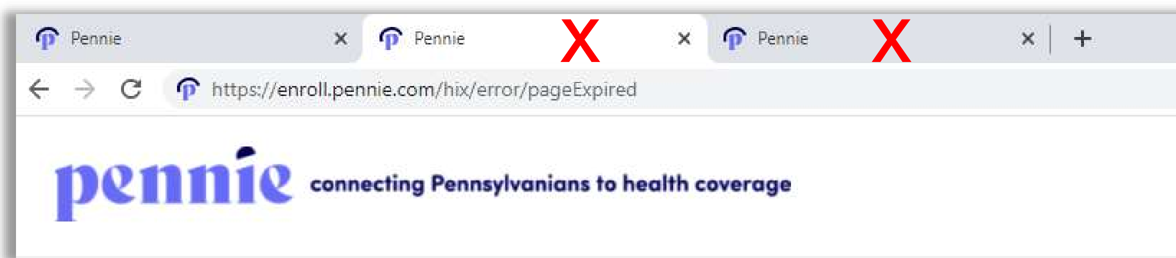
Tips for Using Your Pennie Portal

Only work on one customer at a time.

Never have the Pennie Platform open in more than one web browser tab at a time.

***Do not* use the back button while navigating through the Pennie Platform**; using the back button and/or multiple tabs may result in:

1. Privacy and security incidents within the enrollments of your clients or additional Pennie customers
2. Privacy and security incidents within the Agency, Agency Manager or Agent's profiles
3. Incorrect user account information, *and/or*
4. Enrollment errors



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