pennie®

Agent (Broker) Account Creation and Claiming Guide

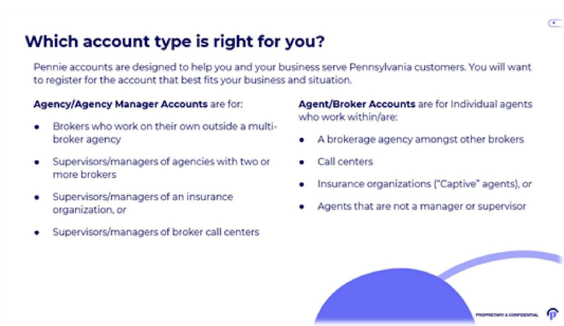
Overview

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.

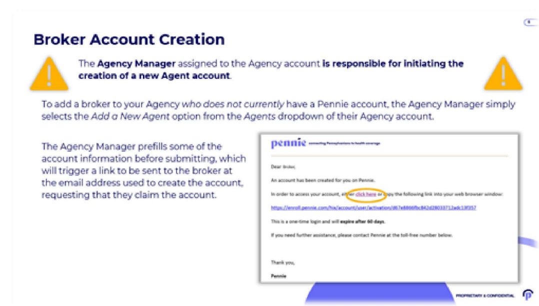
This guide will review the steps needed to create an **Agent (Broker) Account**. For assistance creating an **Agency and Agency Manager account**, please refer to our **Agency & Agency Manager Account Creation Guide**.

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

What tools are inside the Broker Portal?

What can you do with the Pennie Broker Portal?

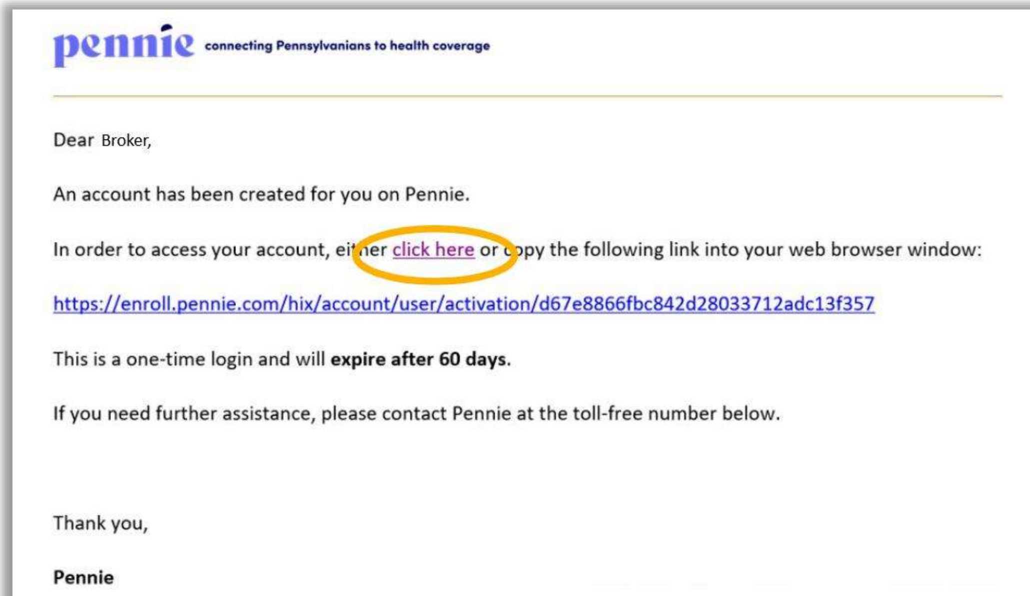
1. Accept new customers / remove customers from your own Book of Business
2. Manage current customers and see their current application status
3. Manage current customers' Data Matching Inconsistencies (DMI) and other tickets
4. Process an application on your customer's behalf, *and*
5. Manage your broker profile information

Broker Account Creation

The **Agency Manager** assigned to the Agency account **is responsible for initiating the creation of a new Agent account**.

To add a broker to your Agency *who does not currently* have a Pennie account, the Agency Manager simply selects the *Add a New Agent* option from the *Agents* dropdown of their Agency account.

The Agency Manager prefills some of the account information before submitting, which will trigger a link to be sent to the broker at the email address used to create the account, requesting that they claim the account.



pennie connecting Pennsylvanians to health coverage

Dear Broker,

An account has been created for you on Pennie.

In order to access your account, either click here or copy the following link into your web browser window:

https://enroll.pennie.com/hix/account/user/activation/d67e8866fbc842d28033712adc13f357

This is a one-time login and will **expire after 60 days**.

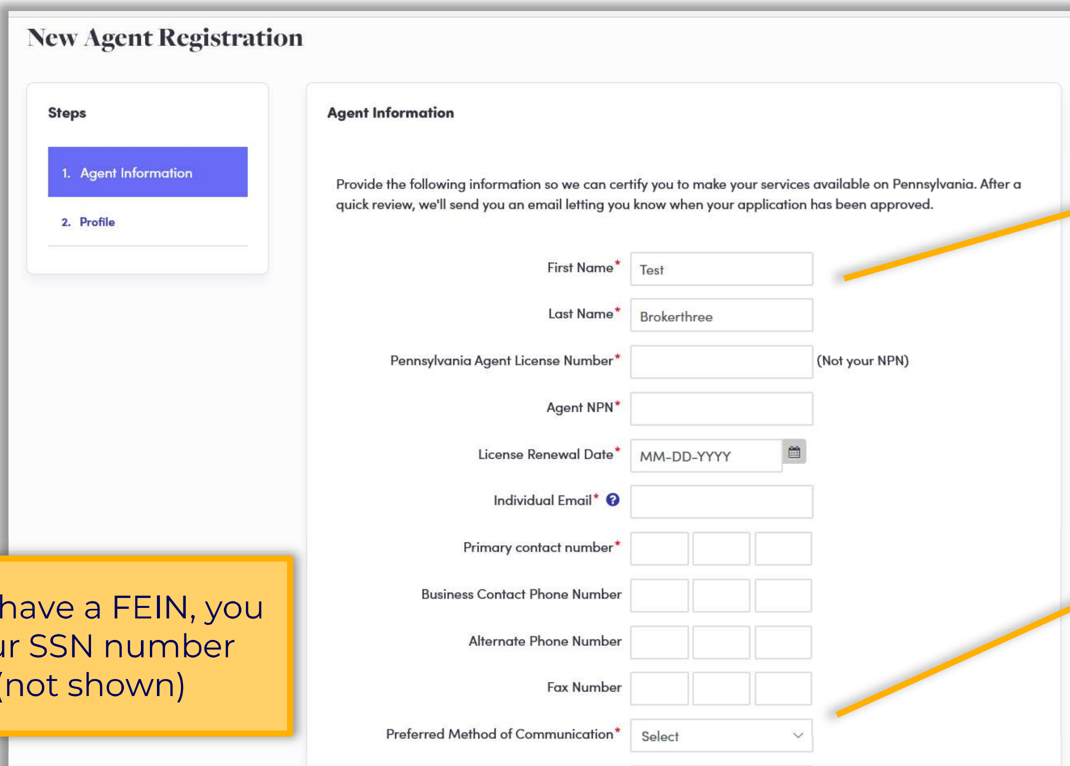
If you need further assistance, please contact Pennie at the toll-free number below.

Thank you,

Pennie

Completing Your Broker Account

Upon claiming your account, you will verify the information that the Agency Manager prefilled before finishing the set up of the account by adding some additional information and selecting your preferences:



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* Test

Last Name* Brokerthree

Pennsylvania Agent License Number* (Not your NPN)

Agent NPN*

License Renewal Date* MM-DD-YYYY

Individual Email*

Primary contact number*

Business Contact Phone Number

Alternate Phone Number

Fax Number

Preferred Method of Communication* Select

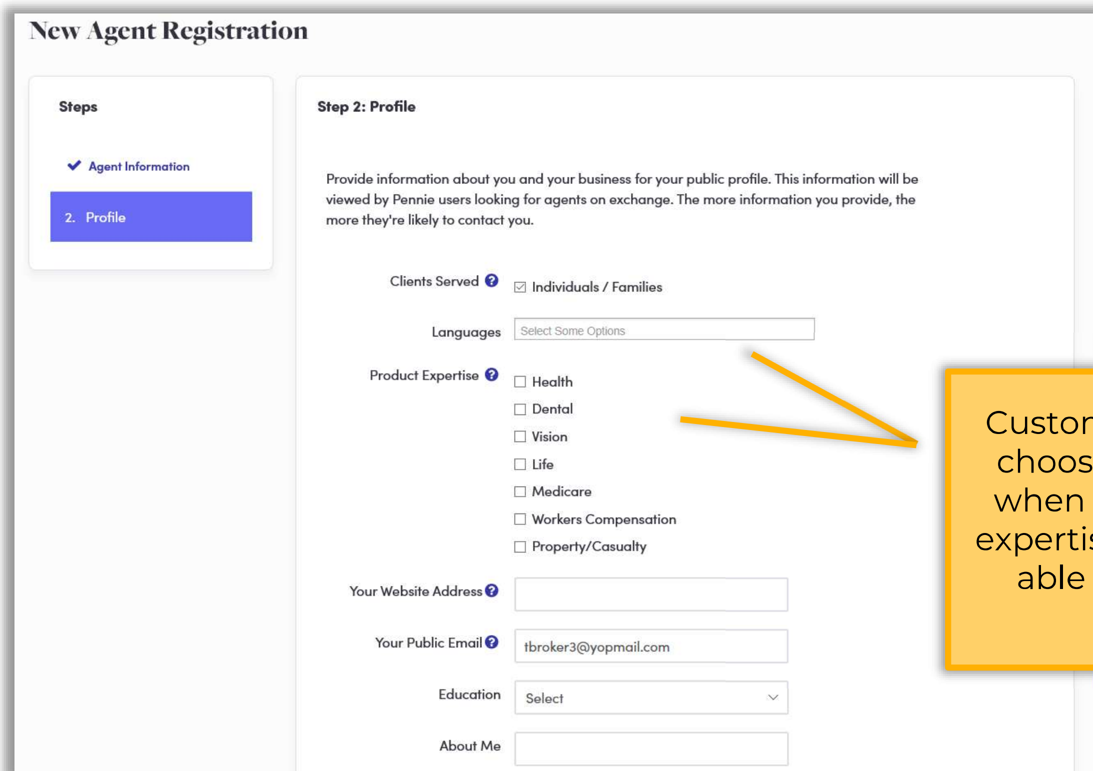
Your name, contact information, and NPN will be available for customers to see in your public Pennie profile

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)

Completing Your Broker Account

An important component to your Pennie Agent profile is an accurate portrayal of your product expertise, public website, and professional education. This is what customers will see when searching for a broker:



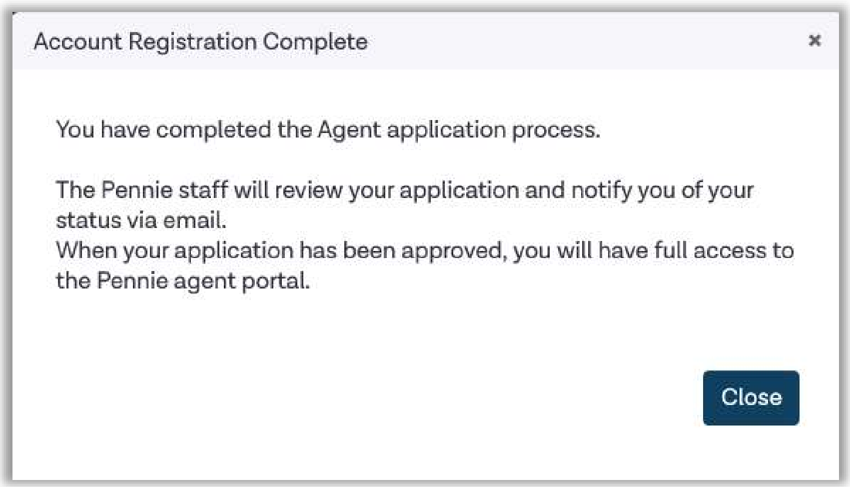
Customers will be able to better choose a broker to assist them when they know what product expertise you have, and if you are able to speak any additional languages

Completing Your Broker Account

After completing your Pennie profile, a system notification will inform you of the Pennie review and approval process.

In order to become Pennie-certified, all brokers *must*:

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 claim a Broker account along with an overview of the account Dashboard can be found on Pennie's YouTube page: Claiming a Broker Account & Overview of Broker Dashboard | YouTube – PenniePA.

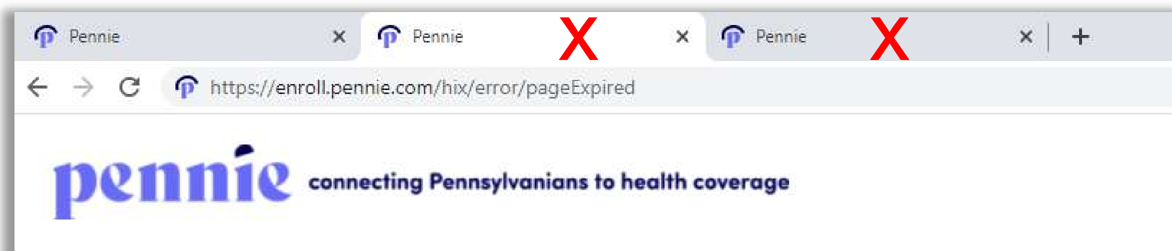
Tips for Using Your Pennie Broker Portal

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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