Managing the Employer Account

This section will review how to manage the employee roster within the employer's account. You can access the employee roster by clicking "Employees" in the blue box on the left side of the employer's screen.

Employee Roster

You haven't added any employees to your roster. Select 'Add New Employee' to begin, or select 'Upload Employee Roster' if you'd like to download the roster template and/or upload it now or later.

For each employee you add, you'll need:
- Name
- Date of birth
- Social Security number
- Date of hire

If you plan to make an optional contribution towards employee family coverage and need an accurate cost estimate, you'll also need the date of birth for all family members because monthly premiums are based on age.

ADD NEW EMPLOYEE   **UPLOAD EMPLOYEE ROSTER**

My DC Health Link
Employees
Benefits
Brokers
Documents
Inbox **0**

My Account
Update Business Info
View Billing Reports

MY EMPLOYEES: 0

You can add employees one at a time by clicking "ADD NEW EMPLOYEE". Or you can click "UPLOAD EMPLOYEE ROSTER" to download the roster template or upload a completed roster. The roster template is also available on the "Forms" section on the homepage of www.dchealthlink.com.

Upload Employee Roster

If you completed your employee roster offline using our Microsift Excel template, find the file on your computer and upload it here.

Need the template? ⊕ Download it now.

SELECT FILE TO UPLOAD

To download the roster template, click "Download it now"- This link will download a blank roster template to your computer.
When you have completed the roster, click "Select File to Upload-" to select the location of the file you would like to upload.
When adding employees to the csv file be sure to fill in all required fields and use the drop downs provided when necessary.

Family ID # (to match family members to the EE) (Optional)	Relationship (EE, Spouse, Domestic Partner, or Child)	Last Name	First Name	Middle Name or Initial (Optional)	Suffix (Optional)
The **Family ID** column will match family members on the roster together by a number.	The **Relationship** column which has a dropdown will display an option for employee, spouse, domestic partner, or child.	The **Last Name, First Name** columns should list the last name and first and not the middle initial.	The **Last Name, First Name** columns should list the last name and first and not the middle initial.	The **Middle Name** or **Initial** column is where you can add the middle name or initial to the employee.	The **Middle Name** or **Initial** column is where you can add the middle name or initial to the employee.

Now we will display each Column on the employee roster template and the purpose of each, moving from left to right on the template. The Family ID column will match family members on the roster together by a number. This is only required if you are adding dependents to the roster. The Relationship column has a drop down that must be selected to indicate whether the person is an employee, spouse, domestic partner, or child. The Last name and first name columns should list the appropriate names in each field. Enter a middle initial or name in the next column, if desired. A suffix can also be added.

Email Address	SSN/TIN (Required for EE)	Date of Birth	Gender
The **Email Address** column is where you would add the employee's email to where they would like to receive their invite to enroll in benefits	The **SSN/TIN** field is where you would add the employee's social security number.	The **Date of Birth** columns is used to list the employee's date of birth. Please be sure to use dashes (-) to separate the numbers).	The **Gender** column will have drop downs to select the type of gender. The drop down will list 2 options male or female.

An email address is required for each employee. Please be sure emails are pasted without formatting. This email address is where notices alerting employees they are able to make a plan selection will be sent. A social security number or Tax Identification Number is required for each employee. SSNs and TINs are not required for dependents. If an employee does not have an SSN or TIN, please reach out to DC Health Link for assistance. Please enter the date of birth for all employees and dependents. Use the drop down menu available in the next column to select the gender. This is a required field.

Date of Hire	Date of Termination (Optional)	Is Business Owner?	Benefit Group (Optional)	Plan Year (Optional)
The **Date of Hire** column should list the employees dates that they were hired on.	The **Date of Termination** column is used to add multiple employees termination dates.	The **Business Owner** column is used to define the owner or in most cases the Point of Contact for the Business. This column has a drop menu that will have 2 options yes or no.	The **Benefit Group** Column will list the name of the Benefit Group the employer assigned when the plan year was published. This information may not be available at the time therefore it is optional.	The **Plan Year** column will list the year of the plan that the group is enrolling in. This field is optional as well.

Enter a date of hire for all employees. A date of termination can be entered when you are terminating an employee from the roster. An employee must have been already added to the roster for you to terminate them. Use the drop down menu to indicate whether this person is an owner.

Entering the benefit group here will automatically assign employees to the specified benefit group. Entering the Plan Year will help differentiate which benefit package to add employees to if multiple benefit packages of the same name exist.

Address Kind (Optional)	Address Line 1(Optional)	City (Optional)	State (Optional)	Zip (Optional)
The **Address Kind** column has a drop down menu that will have 2 options. The options are Home or Work.	The **Address Line 1** column will list the street name of the employee's home or work address.	The **City** column is used to list the city of the employee's address.	The **State** column is used to list the state of the employee's address.	The **Zip** column is used to list the zip code of the employee's address.

If entering an address, please use the drop down menu to select the type of address (home or work) you are entering. The next lines are where you will enter the street name and number, city, state, and zip code.

Once the spreadsheet is complete you can upload the roster to the account. You will see the total number of additions from the sheet to match the total number of employees you have.

A key to understanding the status and enrollment status is located under the "Forms" section on DC Health Link, in the walkthrough guide titled "Employers Manage your Employee Roster".

Employee Roster

✕   Search

Select 'Add New Employee' to continue building your roster, or select 'Upload Employee Roster' if you're ready to download or upload the roster template. If you need to edit information for an employee, or if you're ready to add your employee to a benefit package you created, scroll over the employee's name and select the pencil icon to the right. When you're finished with your roster, select 'Benefits' in the blue menu bar to the left to continue.
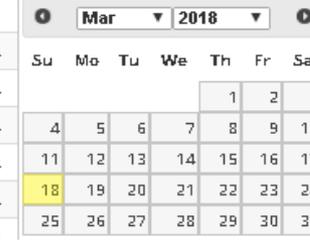
| ➕ Add New Employee | 🗎 Upload Employee Roster | ☁ Download Employee Roster | | | ACTIVE ⌄ |

Employee Name	Date of Birth	Date of Hire	Employee Account Status	Benefit Package	Current Enrollment Status	
Ivonne Basilio	11/25/1976	06/02/2008	No Account Linked	Benefits		🗑 ✏
Dorsey Deady	05/02/1992	02/04/2015	No Account Linked	Benefits		🗑 ✏
Rosalind Donelan	05/28/1989	10/15/2014	No Account Linked	Benefits		🗑 ✏

To edit an employee's information once you have added them to the roster, click on the pencil icon. Click the pencil icon. To terminate an employee from the roster, click the trashcan icon.

Here you can edit an employee's demographic information and add or edit information for family members. Once an employee has created their account, you will not be able to edit the date of birth, social security number, and date of hire. To confirm the information, click "update employee".

To terminate an employee from the roster, hover over the employee's name and click on the trashcan icon. Enter the last day of employment and click "Terminate Employee". Their coverage will end the last day of the month in which the termination occurred. Alternately, you can terminate employees by uploading a new employee roster and including a date of termination for the desired employee.

Employee Roster Key

Employee Account Status

- ***No Account Linked -*** The Employee is eligible for employer sponsored coverage but has not yet logged into their account and linked to their employer
- ***Account Linked -*** The Employee is eligible for employer sponsored coverage, has created an account, and has linked to their employer

Current Enrollment Status

- ***Enrolled -*** Employee selected a plan
- ***Terminated -*** Employee's coverage ended due to QLE
- ***Waived -*** Employee waived coverage
- ***Blank -*** Employee has not made a plan selection or waived coverage

Here is a key to the employee roster.
Under the Status Column, an employee's status will read "No Account Linked" or "Account Linked." If an employee has not logged into their DC Health Link account, the status will read "No Account Linked". If they have, it will read "Account Linked". Brokers are only able to complete actions on behalf of an employee once they have Linked to the roster.

The Enrollment Status will tell you if an employee has made their plan selection, terminated, waived coverage, or has not yet taken the necessary actions.

Employee Roster Key (cont.)

Renewal Enrollment Status

- *Auto-Renewing -* Employee will be auto-renewed into the next PY
- **Enrolling -** Employee made an active plan selection
- *Waiving -* Employee is waiving coverage for the upcoming PY

Once the renewal Plan Year begins, the "Renewal Enrollment Status" column on the roster replaces the "Current Enrollment Status" column.

To add an employee to COBRA/DC Continuation, filter by "Terminated" and click on the COBRA button next to the employee's name.

The COBRA/DC Continuation effective date will already be prepopulated based on the termination date enter into the system. Once you have submitted the information, the COBRA/DC Continuation information will be transmitted to the carrier.

Employee Roster

Employee Name, SSN ✖ **Search**

Select 'Add New Employee' to continue building your roster, or select 'Upload Employee Roster' if you're ready to download or upload the roster template. If you need to edit information for an employee, or if you're ready to add your employee to a benefit package you created, scroll over the employee's name and select the pencil icon to the right. When you're finished with your roster, select 'Benefits' in the blue menu bar to the left to continue.

Plan Match Tool

&+ Add New Employee | **📄 Upload Employee Roster** | **☁ Download Employee Roster** | ACTIVE ∨

Employee Name	Date of Birth	Date of Hire	Employee Account Status	Benefit Package	Current Enrollment Status		
Judith Blue	10/15/1956	09/02/2000	Cobra Linked	Medical enrollment 2018	Enrolled (Health)	🗑 ✏
Mark Schultz	08/01/1985	05/11/2015	Account Linked	Medical enrollment 2018	Enrolled (Health)	🗑 ✏
Jon Smith	08/29/1983	06/10/2015	Account Linked	Medical enrollment 2018	Enrolled (Health)	🗑 ✏

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Once you have submitted the information, the COBRA/DC Continuation information will be transmitted to the carrier and the employee account status on the employee roster will display as COBRA Linked. For more information about COBRA/DC Continuation, please see our walkthrough guide titled "Enrolling in COBRA" located under the employers section on DC Health Link.

Employers and brokers can also give employees access to employer accounts by assigning "employer staff roles". They would be designated as the point of contact for the group and you can have more than one staff person assigned to an employer account. Click on update business info, then "add employer staff role"

Enter the employee's demographic information and Save.

This will give anyone listed under the point of contact employer staff access to the employer account.

If you would like to remove a point of contact, please select the trash can icon next to their name and click on okay to confirm

This will terminate their access and you will receive a confirmation notice. For more information about managing employer points of contact, please see our walkthrough guide titled "Managing Employer Points of Contact" located under the employers section on DC Health Link.