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.



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.



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 <i>Family ID</i> column will match family members on the roster together by a number.	The <i>Relationship</i> column which has a dropdown will display an option for employee, spouse, domestic partner, or child.	The <i>Last Name</i> , <i>First Name</i> columns should list the last name and first and not the middle initial.	The <i>Last Name</i> , <i>First Name</i> columns should list the last name and first and not the middle initial.	The <i>Middle</i> <i>Name</i> or <i>Initial</i> column is where you can add the middle name or initial to the employee.	The <i>Middle</i> <i>Name</i> or <i>Initial</i> 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 <i>Email</i> <i>Address</i> 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 <i>Plan Year</i> 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	Address Line	City	State	Zip
(Optional)	1(Optional)	(Optional)	(Optional)	(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 <i>City</i> 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 <i>Zip</i> 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.

My DC Health Link	Employ	ree Ro	ster			Employee Name, SSN		×	Search
Employees Benefits Brokers	Select 'Add New download or up employee to a When you're fir	w Employee' bload the ros benefit pack hished with y	to continue iter template age you crea iour roster, s	e building yo e. If you ne ated, scroll select 'Ben	our roster, or ed to edit inf over the em efits' in the b	select 'Upload Em formation for an en ployee's name and plue menu bar to th	ployee Roster' if you're re ployee, or if you're ready select the pencil icon to ne left to continue.	ady to to ado the rig) d your ght.
Documents									
Billing Messages 😦	Lange Add New Em	ployee 🖹 L	Jpload Employ	yee Roster	& Download	Employee Roster	urrent Enrollment Status	A	.CTIVE 🗸
SmallBiz Company	lvonne Basilio	11/25/1976	06/02/2008	No Accoun	t Linked	Benefits		Û 🖋	
(Demo 2)	Dorsey Deady	05/02/1992	02/04/2015	No Accoun	t Linked	Benefits		û 🖋	
View Enrollment Reports	Rosalind Donelan	05/28/1989	10/15/2014	No Accoun	t Linked	Benefits		Û 🖋	
MY	Leota Flagler	01/22/1986	12/31/2012	No Accoun	t Linked	Benefits		Ô 🖋	
EMPLOYEES: 10	Jerald Ho	11/06/1990	04/19/2013	No Accoun	t Linked	Benefits		Ô 🖋	
	Paola Jungers	04/03/1972	07/17/2008	No Account	t Linked	Benefits		û 🖍	
	Krystina Roder	12/03/1992	04/01/2015	No Account	t Linked	Benefits		Ô 🖋	
	Clair Roussel	06/04/1974	02/10/2012	No Account	t Linked	Benefits		ê 🖋	

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 Emp	oloyee 📔 U	oload Employe	ee Roster 💧 Download E	mployee 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	ŵ 💉
Dorsey Deady	05/02/1992	02/04/2015	No Account Linked	Benefits	ŵ 💉
Rosalind Donelan	05/28/1989	10/15/2014	No Account Linked	Benefits	iii 🖋

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.



FIRST NAME Sarah	MIDDLE NAME	LAST NAME Allen	SUFFIX
DATE OF BIRTH 04/05/1990	SOCIAL SECURITY 390-40-9234	◯ MALE	FEMALE
HIRE DATE 04/08/2010	OWNER?	DC Location	
ADDRESS		Home Address	
ADDRESS LINE 1 158 1st St		ADDRESS LINE 2	
стү Washington	DC	Ŧ	ZIP 20036
home		Email sallen@yopmail.com	

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".

My DC Health	Employee Roster Employee Name, SSN	×	Search
Link <u>Employees</u> Benefits Brokers	Select 'Add New Employee' to continue building your roster, or select 'Upload Employee Roster download or upload the roster template. If you need to edit information for an employee, or if y employee to a benefit package you created, scroll over the employee's name and select the pe When you're finished with your roster, select 'Benefits' in the blue menu bar to the left to conti	' if you're ready t ou're ready to ad ncil icon to the ri nue.	o Id your Ight.
Billing Messages (2)	Add New Employee I Upload Employee Roster Download Employee Roster	¢ nt Status	ACTIVE 🗸
SmallBiz Company (Demo 2) Update Business Info View Enrollment Reports	Ivonne Basilio 11/25/1976 06/02/2008 No Account Linked Benefits Enter termination date to remove Dorsey Deady (termination date must be within the past 60 days) Image: Construction date must be within the past 60 days) Image: Construction date must be within the past 60 days)	nate Employee	Cancel
MY EMPLOYEES: 10	Rosalind Donelan 05/28/1989 10/15/2014 No Account Linked Benefits Su Mo Tu We Th	Fr Sa	
	Leota Flagler U1/22/1986 12/31/2012 No Account Linked Benefits 1 Jerald Ho 11/06/1990 04/19/2013 No Account Linked Benefits 4 5 6 7 8	2 3 ···· · · · · · · · · · · · · · · · ·	
	Paola Jungers 04/03/1972 07/17/2008 No Account Linked Benefits 11 12 13 14 15 Krystina Roder 12/03/1992 04/01/2015 No Account Linked Benefits 18 19 20 21 22	16 17 m /	
	Clair Roussel 06/04/1974 02/10/2012 No Account Linked Benefits Alden Slav 11/04/1986 08/28/2014 No Account Linked Benefits	30 31	
	Loran Tan. 04/28/1972 07/07/2009 No Account Linked Benefits		

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.

Employee Roster

X Search

Plan Match Tool

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			Download Employee Roster		r			
Employee Name	Date of Birth	Date of Hire	Employee Account Status	Benefit Package	Termination Date	Current Enrollment Status		
Judith Blue	10/15/1956	09/02/2000	Employment Terminated	Medical enrollment 2018	03/31/2018	Terminated (Health)	Rehire	COBRA
Jon Brown	08/29/1984	06/10/2015	Employment Terminated	Medical enrollment 2018	09/29/2017		Rehire	COBRA
ludith			Employment	Medical				

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

🛃 Add Nev	v Employee	🖹 Upload	🖹 Upload Employee Roster 🛛 🔕 Download En		mployee Roster			TERMINATED
Employee Name	Date of Birth	Date of Hire	Employee Account Status	Benefit Package	Termination Date	Current Enrollment Status		
Judith Blue	10/15/1956	09/02/2000	Employment Terminated	Medical enrollment 2018	03/31/2018	Terminated (Health)	Rehire	COBRA
Employment 03/31/2018	t Termination	Date:	COBRA/Continuati	ion Effective Date:	04/01/2	018	Submit	
Jon Brown	08/29/1984	06/10/2015	Employment Terminated	Medical enrollment 2018	09/29/2017		Rehire	COBRA
				n a1!1				

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.

Add New Employee Employee Roster							
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)	ŵ 🥟	
Mark <mark>Schultz</mark>	08/01/1985	05/11/2015	Account Linked	Medical enrollment 2018	Enrolled (Health)	Ē 🖋	
Jon Smith	08/29/1983	06/10/2015	Account Linked	Medical enrollment 2018	Enrolled (Health)	Ē 🖉	

Plan Match Tool

3 out of 3

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.

My DC Health	Business	Business Info								
Link	Point of Contact	- Employer Staff								
Employees	First Name	Last Name	Email	Phone	Status	Rem	ove			
Benefits	Pobossa	Tostor	tester@company.com	(202) EEE 1212	Is Activ	e ہوں۔				
Brokers	REDELLA	Tester	rtester@company.com	(202) 555-1212	Linked	Ш				
Families	Add Employer Sta	ff Role								
Documents										
Billing	Employer Inform	ation								
Messages 3	legal name R Tester	DBA	FE 39	IN* 9-0284028	Lin	nited Liability Corporation	~			
R Tester Update Business Info View Enrollment Reports MY	Office Loc	ations								
EMPLOYEES: 3	ADDRESS		Primary	Ŧ			Ŵ			

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"

Health	Busines	s Into									
	Point of Contac	t - Employer Staff									
es	First Name	Last Name	Email	Phone		St	atus				Remo
						Is	Activ	e			Role
	Rebecca	Tester	rtester@company.com	(202) 555-1212		Li	nked	-			Ш
	Add Employer S	Staff									
	FIRST NAME * Mark		LAST NAME * Schultz	LAST NAME * Schultz			DATE OF BIRTH * 8/1/1985				
					O Aug • 1985			T	0		
	SAVE Car	ncel			Su	Мо	Tu	We	Th	Fr	Sa
									1	2	3
					4	10	6	7	15	9	10
					18	12	20	21	22	23	24

Enter the employee's demographic information and Save.

My DC Health	Business Info								
Link	Point of Contact - Employer Staff								
Employees	First Name	Last Name	Fmail	Phone	Status	Remove			
Benefits	i ii se ivanic	Luse Munic	Linan	THONE	Is Active	Role			
Brokers	Rebecca	Tester	rtester@company.com	ו (202) 555-1212	Linked	逆			
Families	Mark	Schultz	markschultz@rtester.e	com	ls Active Linked	圃			
Documents	Add Employer St	aff Role							
Billing									
Messages 🔒	Employer Inform	nation							
R Tester	LEGAL NAME R Tester	DBA	FI 3	ein* 9-0284028	Limited Liabilit	ty Corporation 🔹			
Update Business Info View Enrollment Reports MY EMPLOYEES: 3	Office Loc	ations							
	ADDRESS		Primary	Ŧ		Ŵ			

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

My DC Health	Business Info											
Link	Point of Contact	Point of Contact - Employer Staff										
Employees	First Name	Last Name	Email	Phone	Status	Remove						
Benefits	Debesse	Tastar		- /2020 FFF 1212	Is Active							
Brokers	REDECCA	Tester	rtester@company.com	11 (202) 555-1212	Linked							
Families	Mark	Schultz	markschultz@rtester.com		ls Active Linked	创						
Documents	Add Employer St											
Billing	Add Employer Sta											
Messages 3	Employer Inforn	nation										
R Tester	legal name R Tester	DBA	F	ein* 39-0284028	Limited Liability	Corporation -						
Update Business Info View Enrollment Reports MY EMPLOYEES: 3	Office Location											
	ADDRESS		Primary	∇		Ŵ						

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.