Creating a Broker or General Agency Staff Account
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Creating a Broker or General Agency Staff Account

This guide is for Brokers, General Agencies and their staff. It shows how staff apply for access to their company’s DC Health Link book of business, and how Brokers and General Agencies approve applications, or create staff accounts. The guide also provides an overview of key system features.

Submitting a Broker Staff Role Application

Broker staff who do not already have an account can request access by submitting an application.

Step 1. Go to dchealthlink.com.

Step 2. From the BROKERS menu at the top of the webpage, select ‘Register’, then ‘Broker’.
Step 3. Select the ‘Broker Agency Staff’ tab and enter personal information. Enter the agency’s legal name, Broker’s National Producer Number (NPN), or primary Broker name in the search field to find the correct Broker. Choose SELECT THIS BROKER, and then SUBMIT APPLICATION after finding the correct Broker.

Step 4. After selecting SUBMIT APPLICATION, a banner confirms that the application is under review.
Approving a Broker Agency Staff Role Application

Brokers must approve an application for staff to gain access to their book of business.

Step 1. Login to the Broker account at www.dchealthlink.com.

Step 2. Scroll to the ‘Broker Agency Staff’ section for a list of staff role requests. Select ‘approve’ in the ‘Status’ column to activate a staff member.
**Step 3.** A confirmation message appears at the top of the page.
Creating a Broker Agency Staff Role Account

Once a Broker approves a staff role, the staff member receives an email with the subject line “Invitation to create your Broker Staff account on DC Health Link.” The staff member will open the email and follow these steps to set up an account.

**Step 1.** Select the hyperlink in the email sent by no-reply@dchealthlink.com. The hyperlink opens the ‘Create Account’ webpage.

**Step 2.** Enter an email address or username. Choose and confirm a password. Select CREATE ACCOUNT.
Step 3. Login to the account. The staff member now has access to all the same clients and tools as the Broker.
Access the Broker’s employer group clients by selecting ‘Employers’ in the top, blue menu bar.

Access any of the Brokers’ Individual & Family or Employee clients by selecting ‘Families’ in the top, blue menu bar.
View, assign, and change General Agencies by selecting ‘General Agencies’ in the top, blue menu bar.

Create quotes for employer groups by selecting the ‘Actions’ tab corresponding with the appropriate employer group, then select “Create Quote”.

Create quotes for prospective employer groups by selecting ‘ADD PROSPECT EMPLOYER’.
Access the Broker’s secure messages by selecting ‘Broker Mail’ in the top, blue menu bar.
Broker-Initiated Creation of a Staff Role Account

A Broker can initiate adding a staff member who already has a DC Health Link Broker staff account.

Step 1. Login to the Broker Agency account at www.dchealthlink.com.

Step 2. Scroll to the Broker Agency Staff section. Select ‘Add Broker Staff Role.’
Step 3. Enter staff member information. Select SAVE.

Step 4. A confirmation message will appear at the top of the page.

Step 5. Once a Broker approves a staff role, the staff member receives an email with the subject line “Invitation to create your Broker Staff account on DC Health Link.” The staff member will open the email and follow the instructions.
Submitting a General Agency Staff Role Application

General Agency staff can request access to view and manage their clients by submitting an application.

**Step 1.** Go to dchealthlink.com.

**Step 2.** From the BROKERS menu at the top of the webpage, select ‘Register’, then ‘General Agency’.
Step 3. Select the ‘General Agency Staff’ tab and enter personal information. Enter the agency’s legal name in the search field to find the correct General Agency. Choose SELECT THIS GENERAL AGENCY and then SUBMIT APPLICATION after finding the correct General Agency.

Step 4. After selecting SUBMIT APPLICATION, a banner confirms that the application is under review.
Approving a General Agency Staff Role Application

A General Agency point of contact (POC) must approve an application for staff to gain access to their book of business.

Step 2. Scroll to the General Agency Staff section for a list of everyone who requested a staff role. Select ‘approve’ in the ‘Status’ column to activate a staff member.

Step 3. A confirmation message appears at the top of the webpage.
Creating a General Agency Staff Role Account

Once a General Agency POC approves a staff role, the staff member receives an email from no-reply@dchealthlink.com with the subject line “Invitation to create your General Agency Staff account on DC Health Link.” The staff member should follow these steps to set up an account.

**Step 1.** Select the hyperlink in the email sent by no-reply@dchealthlink.com. The hyperlink opens the ‘Create Account’ webpage.

**Step 2.** Enter an email or username. Choose and confirm a password. Select CREATE ACCOUNT.
Step 3. Login to the account. The staff member now has access to all the same clients and tools as the General Agency POC.
Access the General Agency’s employer group clients by selecting ‘Employers’ in the top, blue menu bar.
Access any of the General Agency’s Individual & Family or Employee clients by selecting ‘Families’ in the top, blue menu bar.

Select ‘Staff’ in the top, blue menu bar to view staff.
Select ‘Agency Mail’ in the top, blue menu bar to access secure messages.
General Agency-Initiated Creation of a Staff Account

A General Agency POC can initiate adding a someone who already has a DC Health Link General Agency Staff role account.

**Step 1.** Login to the General Agency account at [www.dchealthlink.com](http://www.dchealthlink.com).

**Step 2.** Scroll to the ‘General Agency Staff’ section. Select ‘Add General Agency Staff Role’.
Step 3. Enter staff member information. Select SAVE.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Phone</th>
<th>Status</th>
<th>Remove Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Katrina</td>
<td></td>
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<td></td>
<td>Active Linked</td>
<td></td>
</tr>
<tr>
<td>Kirsten</td>
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<td>Active Linked</td>
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<tr>
<td>Stephanie</td>
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<tr>
<td>Julie</td>
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<td>Active Linked</td>
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</tr>
<tr>
<td>Diane</td>
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</tr>
<tr>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:jDoe@aol.com">jDoe@aol.com</a></td>
<td></td>
<td>Active Unlinked</td>
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Add General Agency Staff

<table>
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<tr>
<th>Jane Doe</th>
<th>01/01/1971</th>
</tr>
</thead>
</table>

[Image of DC HealthLink interface for entering staff member information]
Step 4. A confirmation message will appear at the top of the webpage.

![Broker Staff Account Creation](Image)

Step 5. Once a General Agency POC approves a staff role, the staff member receives an email with the subject line “Invitation to create your General Agency Staff account on DC Health Link.” The staff member will open the email and follow the instructions.
Contact and Additional Information

Still have questions? Call DC Health Link at (855) 532-5465.

Last Updated: 1/16/2020 6:13:00 PM