

Creating a Broker Staff Account



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Creating a Broker Staff Account

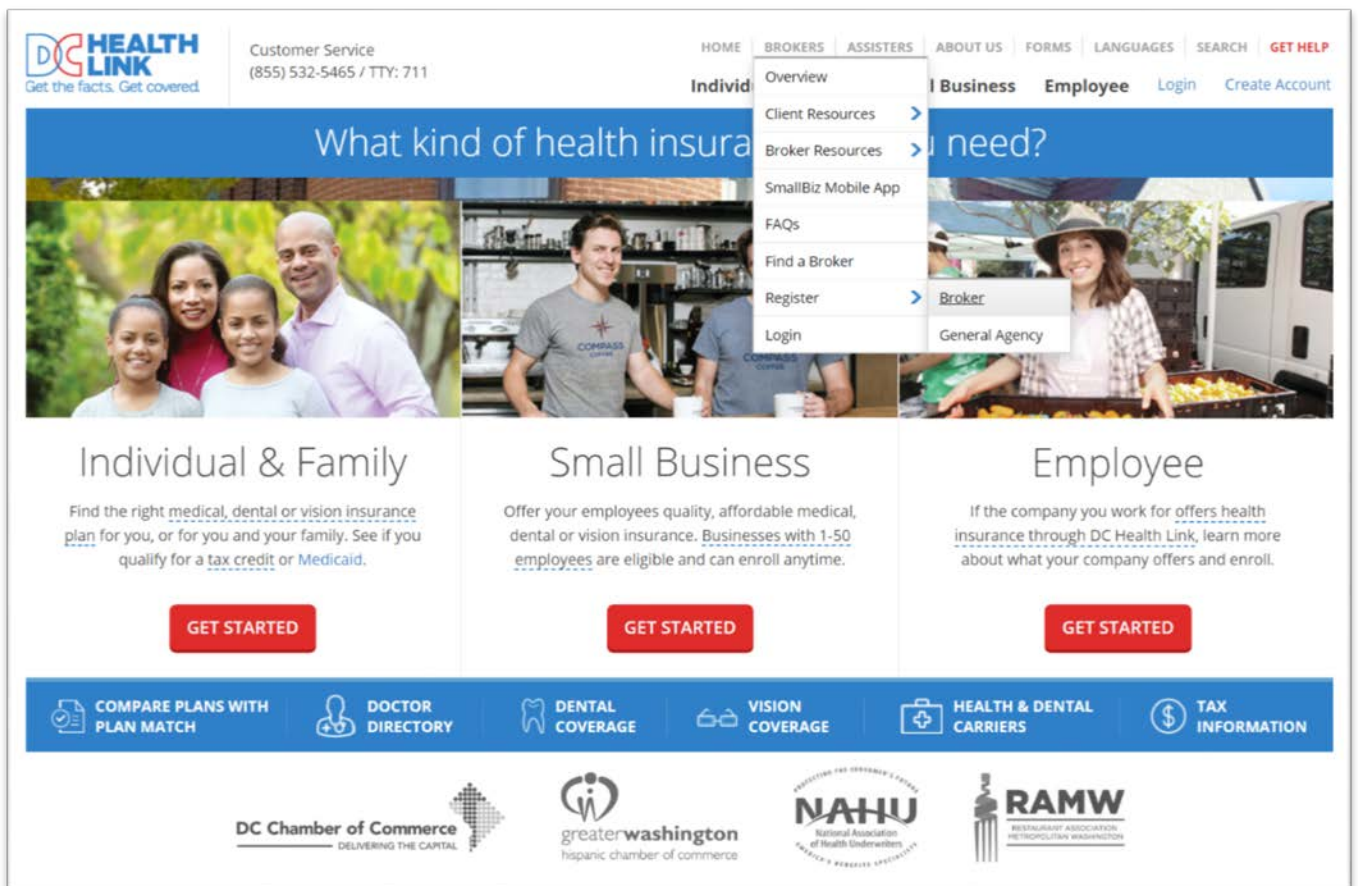
This guide shows Brokers staff members how to create their own DC Health Link accounts to manage the clients of their affiliated Brokers. Once approved, a Broker staff member will have access to a Broker’s entire DC Health Link book of business.

Submitting a Broker Staff Role Application

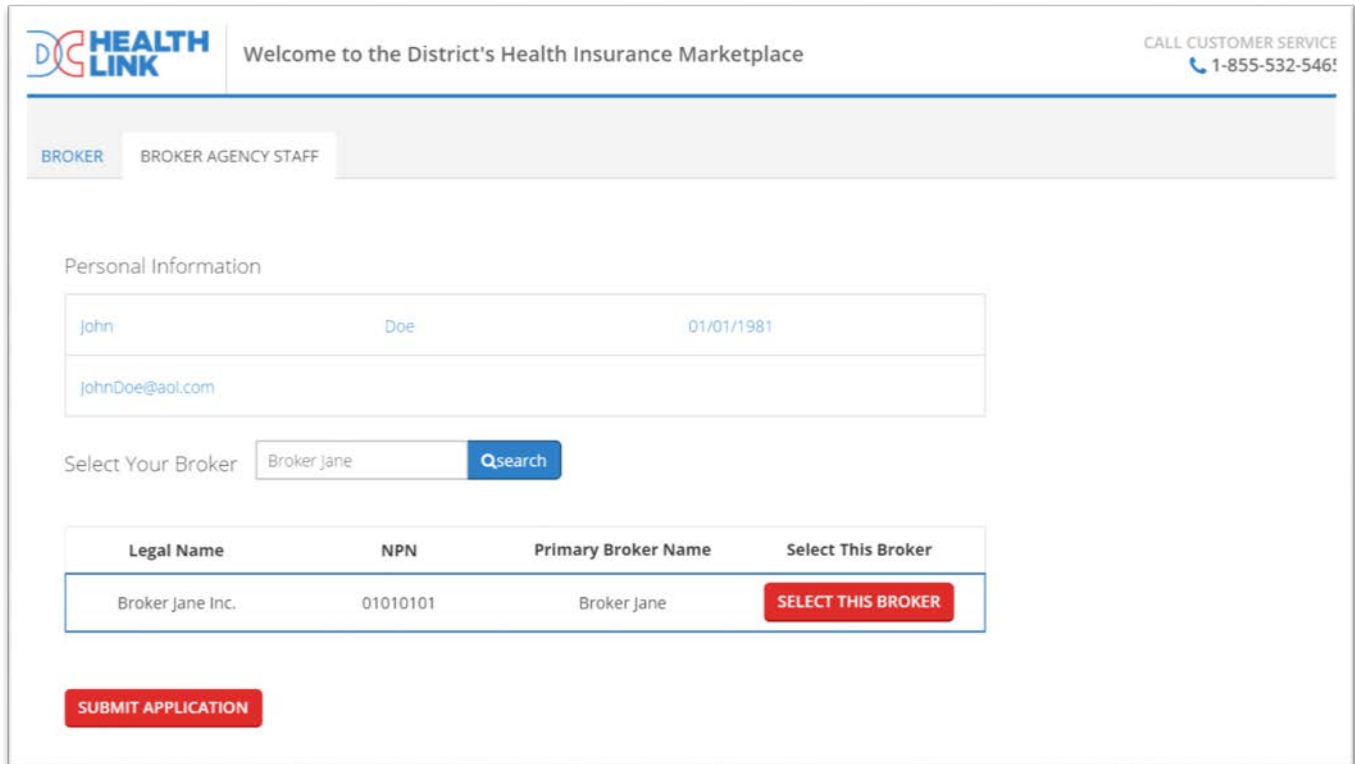
Broker staff members can request the ability to view and manage a Broker’s clients by submitting an application.

Step 1. Go to dchealthlink.com.

Step 2. From the BROKERS menu at the top of the screen, select ‘Register’, then ‘Broker’.



Step 3. Select the BROKER AGENCY STAFF tab and complete the form with your information. Search for your Broker by entering either the agency's legal name, Broker's National Producer Number (NPN), or primary Broker name. Once you have found the correct Broker, select SELECT THIS BROKER and then SUBMIT APPLICATION.



DC HEALTH LINK | Welcome to the District's Health Insurance Marketplace | CALL CUSTOMER SERVICE 1-855-532-546!

BROKER | BROKER AGENCY STAFF

Personal Information

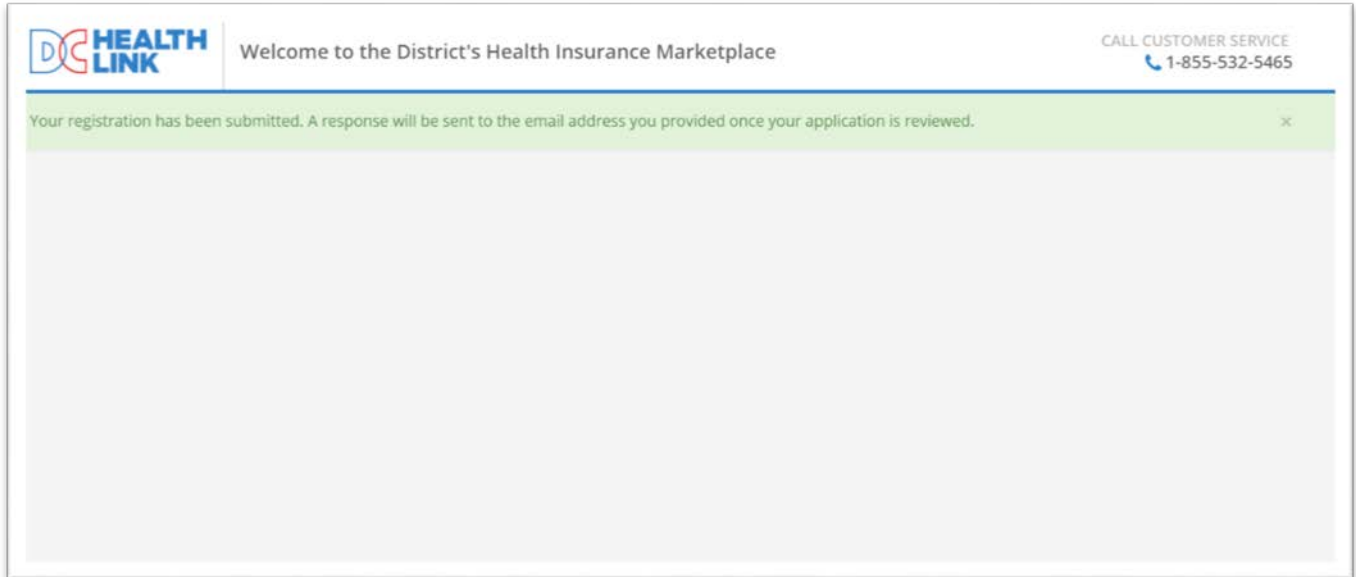
John Doe 01/01/1981
JohnDoe@aol.com

Select Your Broker: Broker Jane [Qsearch]

Legal Name	NPN	Primary Broker Name	Select This Broker
Broker Jane Inc.	01010101	Broker Jane	SELECT THIS BROKER

SUBMIT APPLICATION

Step 4. After registering successfully, a banner will notify you that your application is under review.

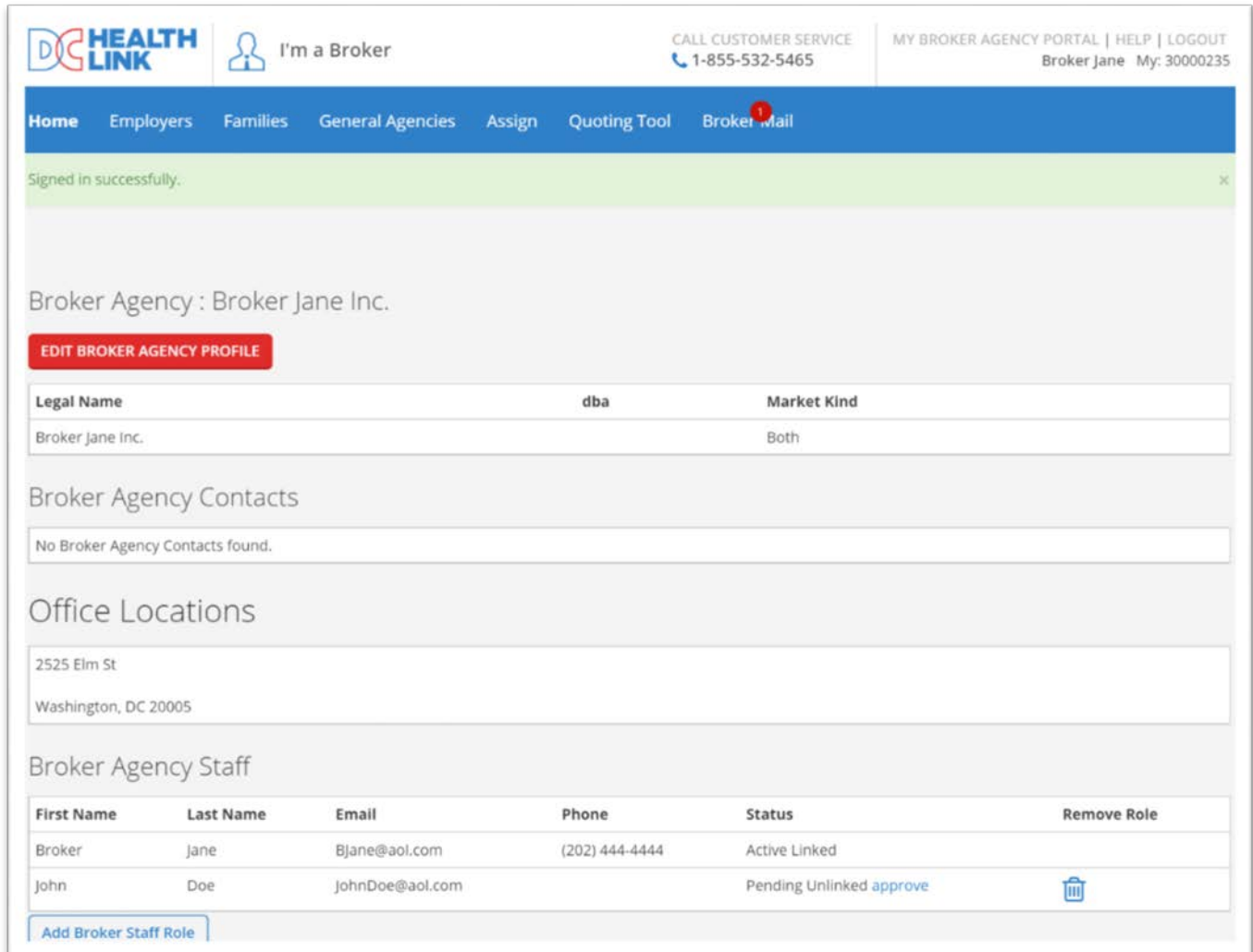


Approving a Broker Staff Role Application

A Broker must approve the Broker staff role application to give the staff person access to the Broker's book of business.

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

Step 2. Scroll to the Broker Agency Staff section for a list of everyone who has requested a staff role. Select 'approve' next to the Pending Unlinked status.



Signed in successfully.

Broker Agency : Broker Jane Inc.

[EDIT BROKER AGENCY PROFILE](#)

Legal Name	dba	Market Kind
Broker Jane Inc.		Both


Broker Agency Contacts

No Broker Agency Contacts found.

Office Locations

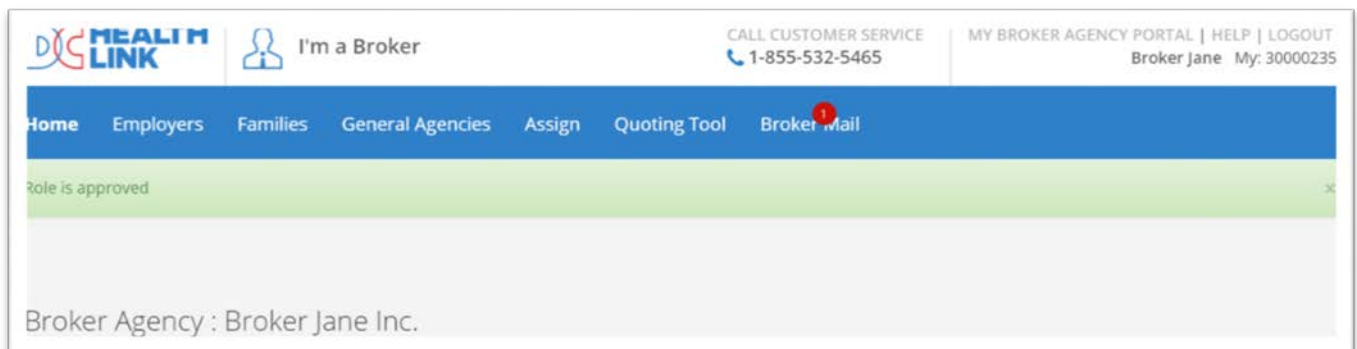
2525 Elm St
Washington, DC 20005

Broker Agency Staff

First Name	Last Name	Email	Phone	Status	Remove Role
Broker	Jane	BJane@aol.com	(202) 444-4444	Active Linked	
John	Doe	JohnDoe@aol.com		Pending Unlinked	approve 

[Add Broker Staff Role](#)

Step 3. A confirmation message appears at the top of the page.



Role is approved

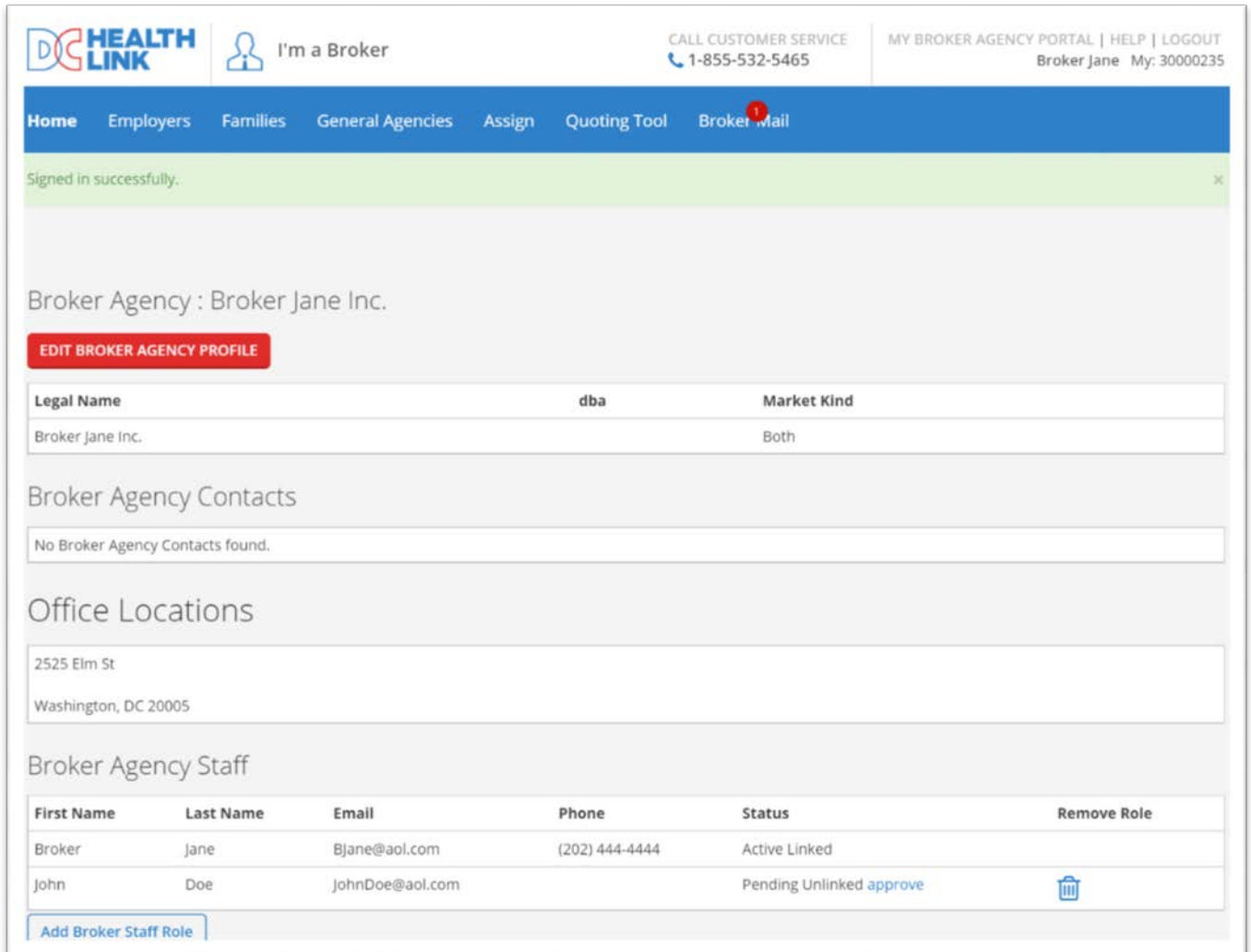
Broker Agency : Broker Jane Inc.

Adding an Existing Broker Staff Member

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


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

Step 2. Scroll to the Broker Agency Staff section. Select 'Add Broker Staff Role'.



The screenshot shows the DC Health Link Broker Agency Portal interface. At the top, there is a navigation bar with the DC Health Link logo, a user profile icon labeled 'I'm a Broker', a customer service phone number (1-855-532-5465), and links for 'MY BROKER AGENCY PORTAL', 'HELP', and 'LOGOUT'. The user is identified as 'Broker Jane My: 30000235'. Below the navigation bar is a menu with options: Home, Employers, Families, General Agencies, Assign, Quoting Tool, and Broker Mail (which has a red notification bubble with the number 1). A green success message states 'Signed in successfully.' The main content area displays the 'Broker Agency : Broker Jane Inc.' with an 'EDIT BROKER AGENCY PROFILE' button. Below this is a table with columns for 'Legal Name', 'dba', and 'Market Kind', showing 'Broker Jane Inc.' and 'Both'. There are sections for 'Broker Agency Contacts' (with 'No Broker Agency Contacts found.') and 'Office Locations' (with address '2525 Elm St, Washington, DC 20005'). The 'Broker Agency Staff' section contains a table with columns for 'First Name', 'Last Name', 'Email', 'Phone', 'Status', and 'Remove Role'. It lists two staff members: 'Broker Jane' (Active Linked) and 'John Doe' (Pending Unlinked approve). At the bottom of the staff table is an 'Add Broker Staff Role' button.

Legal Name	dba	Market Kind
Broker Jane Inc.		Both

First Name	Last Name	Email	Phone	Status	Remove Role
Broker	Jane	BJane@aol.com	(202) 444-4444	Active Linked	
John	Doe	JohnDoe@aol.com		Pending Unlinked approve	


Step 3. Fill out the form. Select SAVE.


Add Broker Agency Staff

Jordan	Baker	01/01/1990
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SAVE
Cancel

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



 I'm a Broker

CALL CUSTOMER SERVICE
1-855-532-5465

MY BROKER AGENCY PORTAL | HELP | LOGOUT
Broker Jane My: 30000235

[Home](#) [Employers](#) [Families](#) [General Agencies](#) [Broker Mail](#)

Role added successfully ×

Broker Agency : Broker Jane Inc.

EDIT BROKER AGENCY PROFILE

Legal Name	dba	Market Kind
Broker Jane Inc.		Both



Broker Agency Contacts

No Broker Agency Contacts found.

Office Locations

2525 Elm St
 Washington, DC 20005

Broker Agency Staff

First Name	Last Name	Email	Phone	Status	Remove Role
Broker	Jane	BJane@aol.com	(202) 444-4444	Active Linked	
John	Doe	JohnDoe@aol.com		Active Linked	
Jordan	Baker	jordanbaker@test.com		Active Linked	

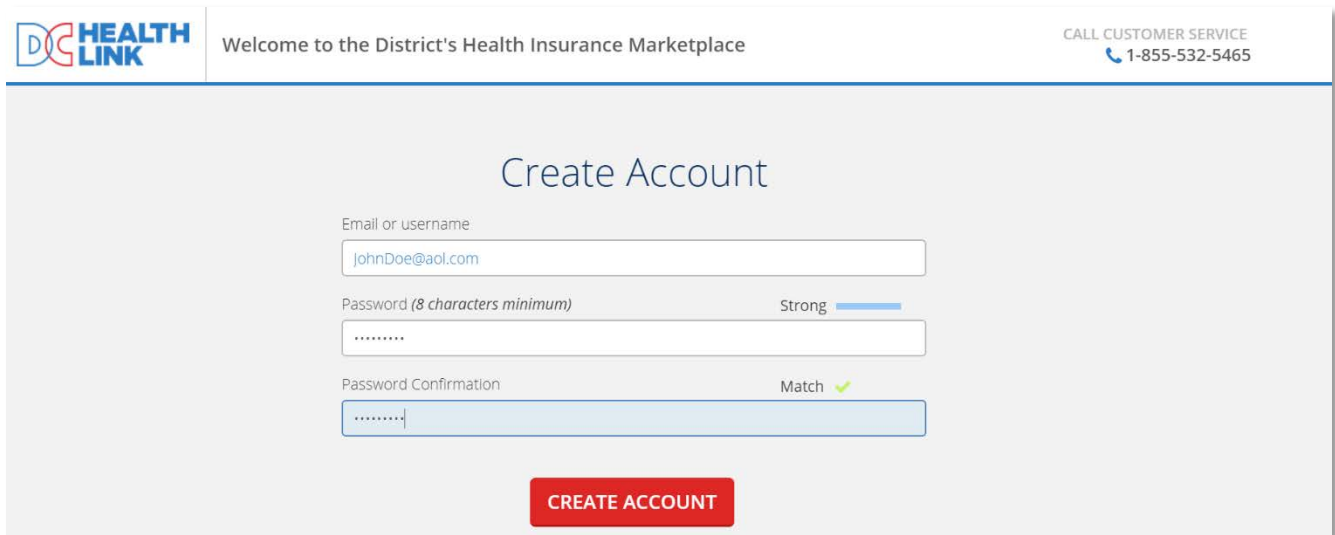
Add Broker Staff Role

Creating a Broker Staff Role Account

Once a Broker approves a Broker staff role, the staff member should follow these steps to set up an account on DC Health Link.


Step 1. Open the link in the email sent by no-reply@dchealthlink.com with the subject "Invitation to create your Broker Staff account on DC Health Link"


Step 2. Set up your account username and password.



The screenshot shows the 'Create Account' page on the DC Health Link website. At the top left is the DC Health Link logo. To its right is the text 'Welcome to the District's Health Insurance Marketplace'. At the top right is the text 'CALL CUSTOMER SERVICE 1-855-532-5465'. The main heading is 'Create Account'. Below this are three input fields: 'Email or username' with the value 'johnDoe@aol.com', 'Password (8 characters minimum)' with a strength indicator 'Strong' and a blue progress bar, and 'Password Confirmation' with a 'Match' indicator and a green checkmark. At the bottom center is a red button labeled 'CREATE ACCOUNT'.

Step 3. Login to your account. You now have access to all the same clients and tools as the Broker.



 I'm a Broker

CALL CUSTOMER SERVICE
1-855-532-5465

MY BROKER AGENCY PORTAL | HELP | LOGOUT
John Doe My: 30000236

[Home](#) [Employers](#) [Families](#) [General Agencies](#) [Assign](#) [Quoting Tool](#) [Broker Mail](#)

Welcome to DC Health Link. Your account has been created. ×

Broker Agency : Broker Jane Inc.

EDIT BROKER AGENCY PROFILE

Legal Name	dba	Market Kind
Broker Jane Inc.		Both

Broker Agency Contacts

No Broker Agency Contacts found.

Office Locations

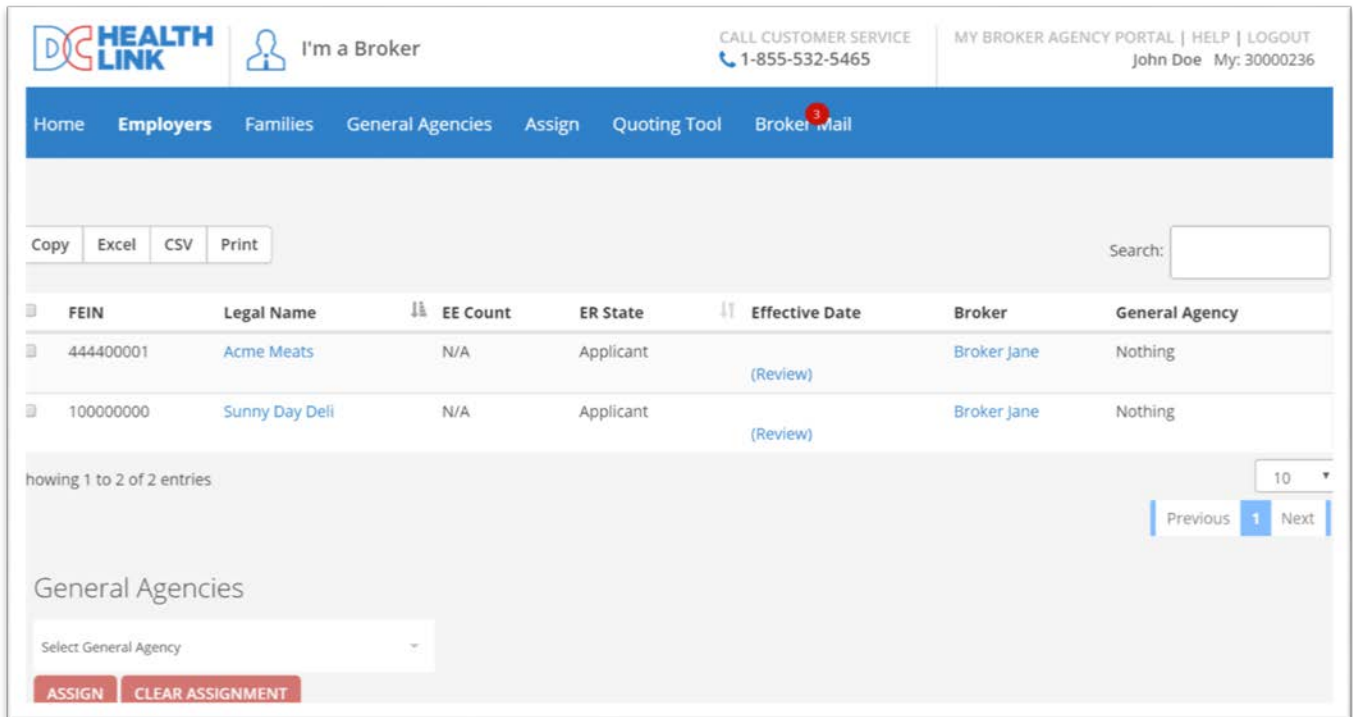
2525 Elm St
Washington, DC 20005

Broker Agency Staff

First Name	Last Name	Email	Phone	Status	Remove Role
Broker	Jane	Bjane@aol.com	(202) 444-4444	Active Linked	
John	Doe	JohnDoe@aol.com		Active Linked	

Add Broker Staff Role

Access the Broker's group clients via the 'Employers' menu.



DC HEALTH LINK | I'm a Broker | CALL CUSTOMER SERVICE 1-855-532-5465 | MY BROKER AGENCY PORTAL | HELP | LOGOUT John Doe My: 30000236

Home Employers Families General Agencies Assign Quoting Tool Broker Mail

Copy Excel CSV Print Search:

FEIN	Legal Name	EE Count	ER State	Effective Date	Broker	General Agency
444400001	Acme Meats	N/A	Applicant	(Review)	Broker Jane	Nothing
100000000	Sunny Day Deli	N/A	Applicant	(Review)	Broker Jane	Nothing

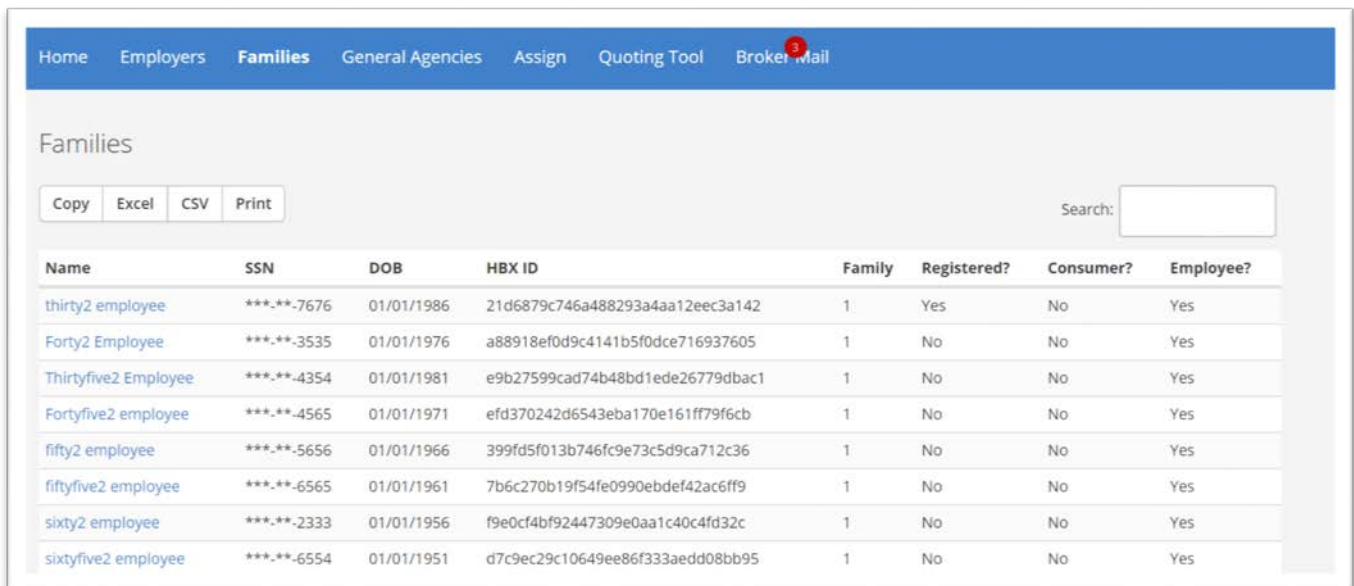
Showing 1 to 2 of 2 entries

General Agencies

Select General Agency

ASSIGN CLEAR ASSIGNMENT

Access to any of the Brokers' Individual & Family or employee clients via the 'Families' menu.



DC HEALTH LINK | I'm a Broker | CALL CUSTOMER SERVICE 1-855-532-5465 | MY BROKER AGENCY PORTAL | HELP | LOGOUT John Doe My: 30000236

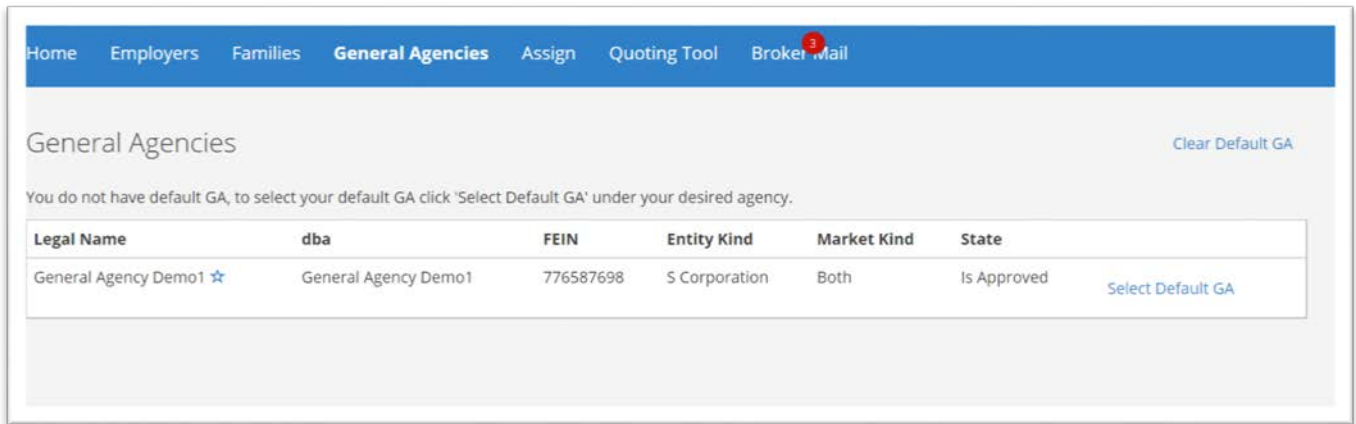
Home Employers Families General Agencies Assign Quoting Tool Broker Mail

Families

Copy Excel CSV Print Search:

Name	SSN	DOB	HBX ID	Family	Registered?	Consumer?	Employee?
thirty2 employee	***-**-7676	01/01/1986	21d6879c746a488293a4aa12eec3a142	1	Yes	No	Yes
Forty2 Employee	***-**-3535	01/01/1976	a88918ef0d9c4141b5f0dce716937605	1	No	No	Yes
Thirtyfive2 Employee	***-**-4354	01/01/1981	e9b27599cad74b48bd1ede26779dbac1	1	No	No	Yes
Fortyfive2 employee	***-**-4565	01/01/1971	efd370242d6543eba170e161ff79f6cb	1	No	No	Yes
fifty2 employee	***-**-5656	01/01/1966	399fd5f013b746fc9e73c5d9ca712c36	1	No	No	Yes
fiftyfive2 employee	***-**-6565	01/01/1961	7b6c270b19f54fe0990ebdef42ac6ff9	1	No	No	Yes
sixty2 employee	***-**-2333	01/01/1956	f9e0cf4bf92447309e0aa1c40c4fd32c	1	No	No	Yes
sixtyfive2 employee	***-**-6554	01/01/1951	d7c9ec29c10649ee86f333aedd08bb95	1	No	No	Yes

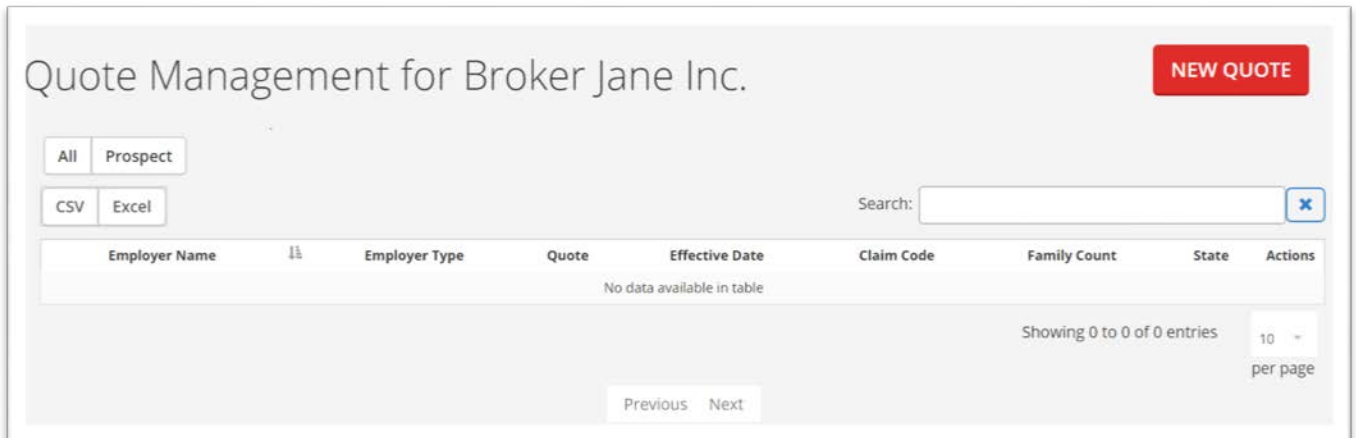
View, assign, and change General Agencies via the 'General Agencies' menu.



The screenshot shows the 'General Agencies' menu in the DC Health Link system. The navigation bar includes 'Home', 'Employers', 'Families', 'General Agencies', 'Assign', 'Quoting Tool', and 'Broker Mail'. The 'General Agencies' page title is displayed, along with a 'Clear Default GA' link. A message states: 'You do not have default GA, to select your default GA click 'Select Default GA' under your desired agency.' Below this is a table with the following data:

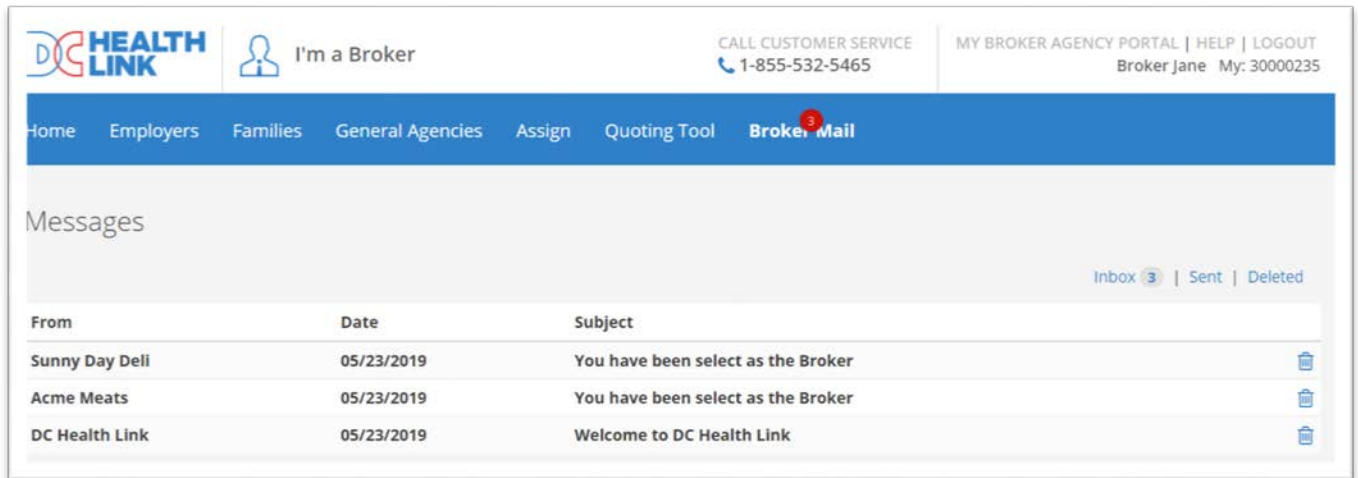
Legal Name	dba	FEIN	Entity Kind	Market Kind	State	
General Agency Demo1 ☆	General Agency Demo1	776587698	S Corporation	Both	Is Approved	Select Default GA

Create quotes for current and prospective group clients by the selecting the 'Quoting Tool' menu.



The screenshot shows the 'Quote Management for Broker Jane Inc.' interface. It features a 'NEW QUOTE' button in the top right corner. Below the title are filters for 'All' and 'Prospect', and buttons for 'CSV' and 'Excel'. A search bar is present with a search icon. The main table has the following columns: 'Employer Name', 'Employer Type', 'Quote', 'Effective Date', 'Claim Code', 'Family Count', 'State', and 'Actions'. The table is currently empty, displaying the message 'No data available in table'. At the bottom right, it shows 'Showing 0 to 0 of 0 entries' and a dropdown menu set to '10 per page'. Navigation buttons for 'Previous' and 'Next' are located at the bottom center.

Access the Broker's secure messages via the 'Broker Mail' menu.



DC HEALTH LINK | I'm a Broker | CALL CUSTOMER SERVICE 1-855-532-5465 | MY BROKER AGENCY PORTAL | HELP | LOGOUT | Broker Jane My: 30000235

Home | Employers | Families | General Agencies | Assign | Quoting Tool | **Broker Mail**

Messages

Inbox 3 | Sent | Deleted

From	Date	Subject
Sunny Day Deli	05/23/2019	You have been select as the Broker
Acme Meats	05/23/2019	You have been select as the Broker
DC Health Link	05/23/2019	Welcome to DC Health Link

Contact and Additional Information

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

Last Updated: 7/2/2019 5:02:00 PM