

MARKETLINK SUGGESTED CALENDAR OF ACTIONS

DAILY

- Manage employee records to ensure accuracy (i.e. make demographic changes if employee requests, process terminations, etc)
- Manage “Tickets” under “Things that Need Your Attention” on Homepage
- Check for Open Life Events or Open EOI Requests
- Review New Hire Tracking to ensure new hires are enrolling within their enrollment window

WEEKLY

- Upload new hires via Data Import Worksheet

SEMI-MONTHLY OR MONTHLY

- Reconcile Bills using MarketLink Premium Billing Reports (Monthly)
- Pull Payroll Report showing changes only (Semi-Monthly, to align with payroll schedule)
- Import Payroll Hours for Variable Hour Workers (Monthly)

LESS FREQUENTLY

- Use Open Enrollment Report and Quick Graphs to see OE Completion Rate (Yearly)
- Approve ACA Forms for Transmission (Yearly)
- Utilize W-2 Report from Report Center (Yearly)
- Pull Overage Dependent Report (Quarterly or as you prefer)