



# Business.kp.org User Guide

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# Welcome to your business.kp.org User Guide

Business.kp.org, formerly account.kp.org, Kaiser Permanente's website for group plan administration is designed to help employers and brokers manage membership, payments, and documentation quickly and easily. You may notice our website is gradually transitioning to the new name [business.kp.org](https://business.kp.org). Both names, account.kp.org and business.kp.org, refer to our site serving Brokers and Employer groups. Our online tools will allow you to:

- Enroll or terminate subscribers, download membership rosters, and order ID cards
- View premium bills in PDF or spreadsheet format, and view payment history
- Pay monthly premiums, set up automatic payments, and manage payment notifications
- Download key group documents like contracts and SBCs

 Watch our [introductory video](#) to understand how online administration can save you time!

Your experience is important to us, and we are continuing to develop new tools and site improvements to better support you. We recommend downloading a new copy of this guide twice a year to ensure that you have the most current information.

Welcome to business.kp.org!

**NOTE:** Our online features may vary by region to accommodate local systems and regulations.


## Introduction and What's New

Business.kp.org is your online home for group administration, offering tools to manage membership, premium payments, and view important documents.

This guide will help you navigate the most commonly used site features.




### Top Tips

- **Watch a video:** Brief tutorial videos are available for many of the online tools, and we're continuing to expand our video library.  
 **Look for this symbol for a link to view the relevant tutorial video**
- **Use the right browser:** For the best experience, use Chrome, Edge, or Firefox.
- **Review access:** Make sure the right people have access to your group's information. Review and update the user list at least every six months and always follow the delegation process when adding new users. Never share your log in credentials with another user.
- **Don't double up:** If your group reports membership electronically via the EDI process, we recommend that you only submit enrollments on business.kp.org when it's critical to enroll a member immediately. Be sure to update your next electronic file to match any changes you made to business.kp.org.



### What's New?

We've made some updates to improve your experience on business.kp.org.

- Multi-State customers should look for important tips with this icon 
- Groups in our Mid-Atlantic and KP Washington regions will gradually transition onto business.kp.org throughout 2025. Your group will be notified once features are available for you.
- [Manage Payments has been upgraded](#) with standardized screens and streamlined navigation functionality consistent with the rest of business.kp.org.
- Brokers can view current group billing and scheduled payments in [Manage Payments](#) (not yet available for Washington and certain Mid-Atlantic groups)
- Brokers can view their Individual and Family (KPIF) Book of Business online, including member coverage information and premium billing (not yet available in Washington).



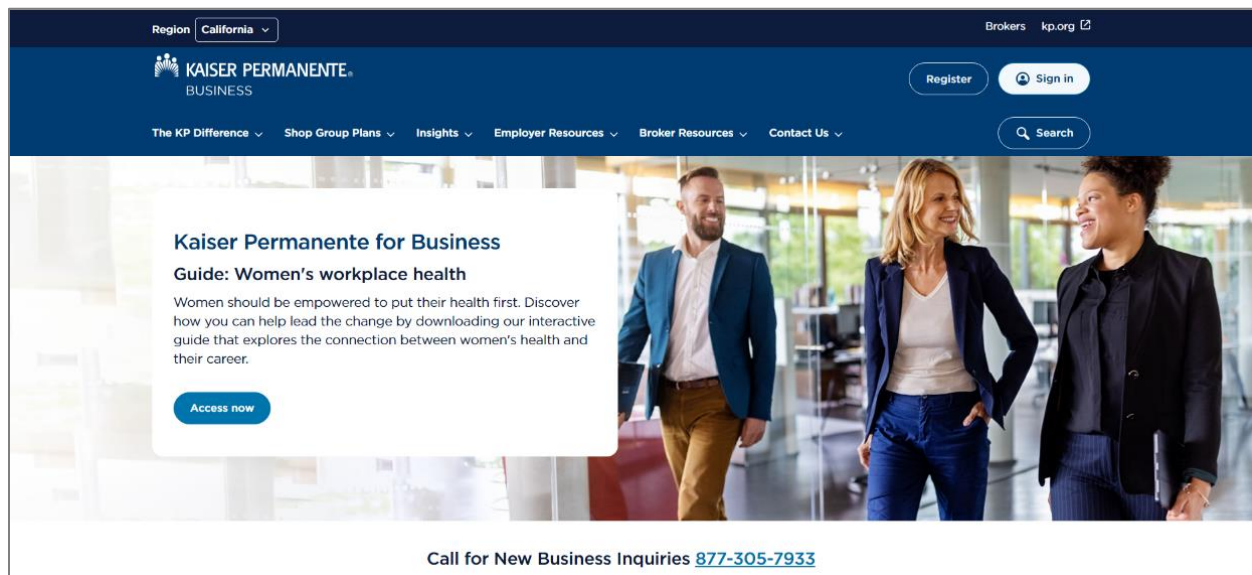
## Business.kp.org (account.kp.org) Access

### Primary Group Administrator Registration Instructions

Every group needs a Primary Group Administrator, or PGA. We recommend this be the business owner for smaller groups, or an HR representative for larger groups. The contract signer for your group will need to approve the PGA to ensure data security.

### Registering for an Account

1. Go to [business.kp.org](https://business.kp.org).
2. Click **Register** (upper right).



3. Complete the registration fields to create a user ID and password. Once registration is complete, the homepage will appear stating: **“Success! You’ve created your account.”** Click **“Sign in to your account”** to continue. Please note, at this point the account has been created but still requires further steps to link to your secure group information.



4. Then on the Dashboard, click the link “**fill out this online account services application form,**” in the **Primary group administrator** section, and complete the web form. A PDF version of the form is also available online.

**Welcome to your Kaiser Permanente employer account**

**Primary group administrator**

To manage your employees' Kaiser Permanente health plan membership online, please have your company group officer [fill out this account services application form](#) OR [print and complete this account services application\(PDF\)](#). The estimated processing time is 3-5 business days

**All Users**

If you have received an access code, please [enter your access code](#) to link your online business account to your group information. You will only need to enter the access code once.

**User Guide**

For assistance with navigation, including help with delegating access, completing membership transactions, making payments, and viewing documents, please reference the [user guide\(PDF\)](#)

5. A confirmation number will be provided upon submission of the web form. The estimated processing time is 3 to 5 business days.
6. Once the request has been processed, an email notification will be sent to the user with additional sign-on instructions.

## Signing into your account

1. Go to business.kp.org.
2. Click **Sign in** to navigate to the log in screen for your secure account.
3. Enter your User ID, your password and click **Sign in**.

## Resetting your account password

1. Go to business.kp.org.
2. Click **Sign in**.
3. Click **Forgot your password?**
4. Enter your **User ID** and click **Continue**.
5. Select an option to use the one-time passcode or security questions method and click **Continue**.
6. Sign in using the temporary password you received by email and follow the prompts to create a new password for your account.

**KAISER PERMANENTE**

**Reset your password**

User ID: [input field]

To protect the security of your account, we need to verify your identity.

**How would you like to proceed? Select an option to continue.**

☒ I'll confirm my email address to get a one-time passcode.

☐ I'll answer my security questions to get a temporary password.

[Forgot your user ID?](#) Back Continue

Can't reset your password online? Please contact us for assistance at 866-575-3562.  
Hours: Monday through Friday, 8 a.m. to 5 p.m. Pacific time, except major holidays.





## Managing Account Access

The Primary Group Administrator (PGA) is in charge of monitoring, delegating, and updating user access to group information. We recommend auditing your user list at least every six months to ensure that roles stay current.

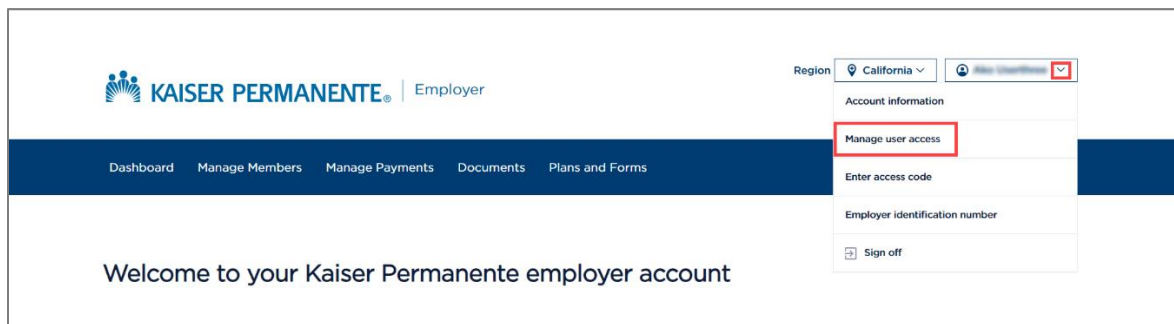
Brokers are granted access to their assigned groups without requiring delegation by the PGA and have certain capabilities in managing their accounts. Brokers and general agents, please refer to the [Broker Supplement](#) for more details.



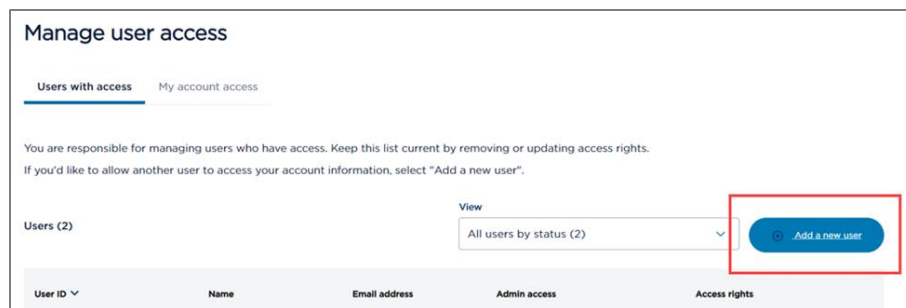
**Multi-State:** For customers that have members in multiple Kaiser Permanente regions and receive a monthly consolidated invoice, you will need access to all groups and bill groups within the consolidation to see their information in **Manage Payments**. To view group information or pay bills, request user access to all associated groups and bill groups. For viewing group invoices in **Documents**, you will need access to the lead group and bill group of the consolidation.

## Adding a Secondary User

1. The Primary Group Administrator signs in on business.kp.org.
2. Click on the account utility menu in the top right.
3. Select **Manage user access**.



4. Click **Add a new user**.





5. Enter the secondary user information and click **Next**.

**Manage user access**

**Users with access** **My account access**

**Add a new user**  
All fields are required unless noted as optional.

**User information**

First name  Last name

Email address

Retype email address

[Cancel](#) [Next](#)

6. Click **Add permissions**

**Add a new user**  
All fields are required unless noted as optional.

**User information**

Name  Company name

Email address  ROP

test@kp.org CAL

**Access permissions for this user**  
To add this user, you must specify access and permissions for at least one group

Permissions (0) [Add permissions](#)

Region	Group	Billing unit	Role
--------	-------	--------------	------

7. In the **Define access permissions for this user** pop-up screen, you may select the appropriate billing unit or leave the default 'All' selected to give access to all billing units. Then select the level of access to be given.

8. Click **Add permissions**.

Define Access permissions for this user Close

Select group and billing unit

Business Region: California ▼ Group ID/name: 22782 - SUMMIT STATE BANK ▼ Billing Unit: All ▼

Select role	<input type="radio"/> View Members & Subscribers	<input type="radio"/> View bill, transactions and group documents	<input type="radio"/> Enroll, update and terminate members	<input type="radio"/> Pay bills and manage payments	<input type="radio"/> View contracts and benefits	<input type="radio"/> Small business renewals	<input type="radio"/> Manage User access
<input type="radio"/> ROLE 3	Yes	Yes	No	No	No	No	No
<input type="radio"/> ROLE 4	Yes	No	Yes	No	No	No	No
<input type="radio"/> ROLE 5	No	Yes	No	Yes	No	No	No
<input checked="" type="radio"/> ROLE 6	Yes	Yes	Yes	Yes	No	Yes	No
<input type="radio"/> ROLE 9	Yes	Yes	No	Yes	No	No	No

Close Add Permissions

9. Click **Add this user**.

Access permissions for this user

To add this user, you must specify access and permissions for at least one group

Permissions (1) Add permissions

Region	Group	Billing unit	Role
California	22782 SUMMIT STATE BANK	All	PURCHASER 6 <span>ⓘ</span> User <a href="#">Edit</a>   <a href="#">Remove</a>

Cancel Previous Add this user

Once the Primary Group Administrator has added the additional user, the new user will receive an automated email with an access code included. The new user will need to create a username and password, log in, and enter the access code on the **Dashboard** screen (the access code link also appears in the account utility menu, and **My account access** page of **Manage user access**).



Please note, group-appointed brokers will be given Purchaser (Role) 6 access to their groups without requiring delegation by the Primary Group Administrator.

PGAs also have the enhanced capability to manage broker access to their online account using the **Manage broker access** section on the **Manage Users** page.

**Manage broker access**

Use the available actions to update broker access for any group listed below. To narrow this list, search by group ID or select a filter option.

Search by:   All results

**Groups (1)**

<input type="checkbox"/> Select all	Group ID <input type="text"/>	Business region	Broker access status	Actions
<input type="checkbox"/>	22782	California	Access allowed	<input type="button" value="X Remove access"/>

1 - 1 of 1 items

**IMPORTANT:** We recommend giving new users a heads up to watch for the access code email, and to be sure that they log into the **employer** side of the site to complete the process.

**Welcome to your Kaiser Permanente employer account**

**Primary company administrator**  
To manage your employees' Kaiser Permanente health plan membership online, please have your company group officer [fill out this account services application form](#) OR [print and complete this account services application](#) (PDF). The estimated processing time is 3-5 business days.

**All Users**  
If you have received an access code, please [enter your access code](#) to link your online business account to your group information. You will only need to enter the access code once.

**User Guide**  
For assistance with navigation, including help with delegating access, completing membership transactions, making payments, and viewing documents, please reference the [user guide](#) (PDF).

Please review the notification regarding changes to [Secure Messaging and Paperless Billing Election](#).

[Click Here for Kaiser Permanente Mid-Atlantic Bill Pay](#)

**Enter Access Code**  
[Enter your access code](#)  
to link your group information to your online account. You will only need to enter the access code once.

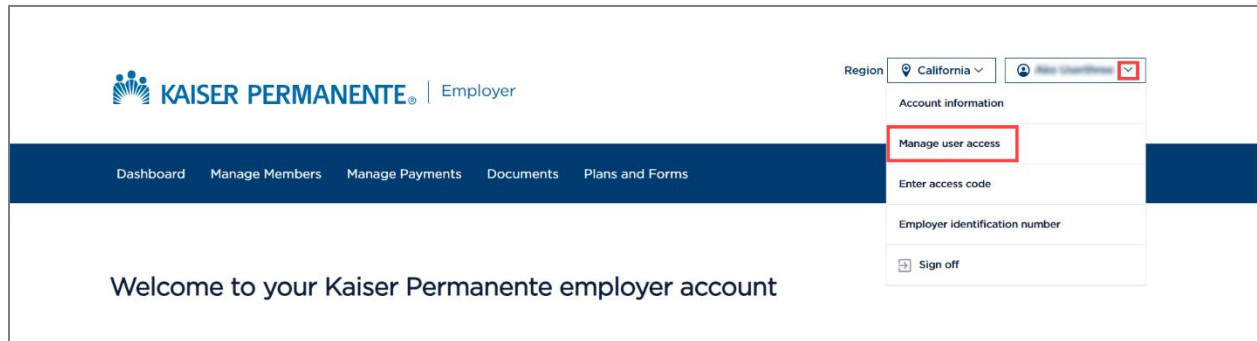
**Upcoming Renewals**  
Select the Group name to view the renewal.

Group 22782  
[SUMMIT STATE BANK](#)

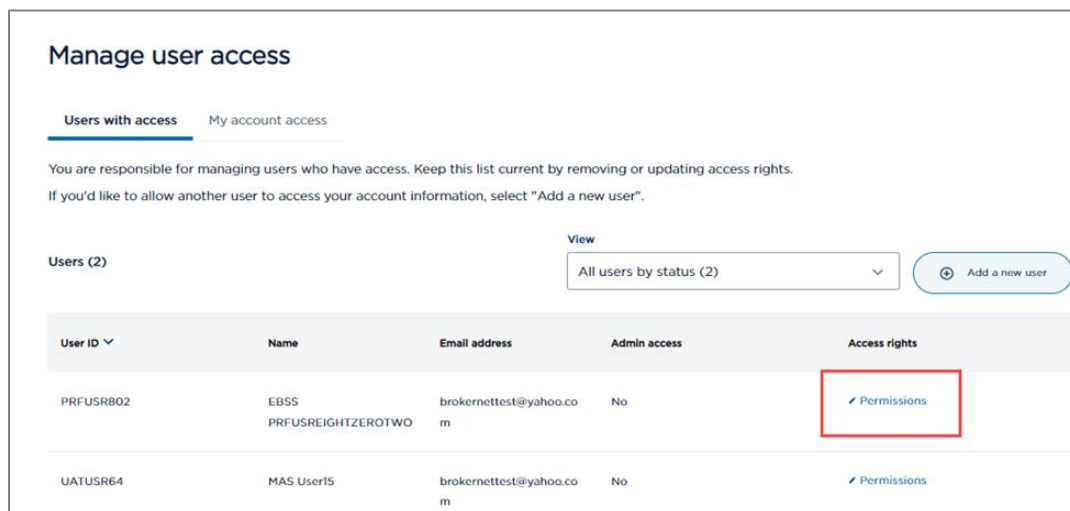


## Modifying a Secondary User's Access

1. Click on the account utility menu in the top right and select **Manage user access**.



2. The Primary Group Administrator will see a list of active users under the **Users with access** section. Please note that users will not appear on the list until they have activated their access code.
3. Click **Permissions** in the **Access rights** column to display the user's access. The user's current access level will display on the screen.



4. Click **Permissions** in the **Access rights** column to display the user's access. The user's current access level will display on the screen.
5. Click **Edit** to update the user's access level.



6. Select the level of access to be given and click **Modify Permissions**.

Define Access permissions for this user Close

Select group and billing unit

Business Region: California ▼ Group ID/name: 22782 - ▼ Billing Unit: ALL ▼

Select role	View Members & Subscribers	View bill, transactions and group documents	Enroll, update and terminate members	Pay bills and manage payments	View contracts and benefits	Small business renewals	Manage User access
<input type="radio"/> ROLE 3	Yes	Yes	No	No	No	No	No
<input type="radio"/> ROLE 4	Yes	No	Yes	No	No	No	No
<input type="radio"/> ROLE 5	No	Yes	No	Yes	No	No	No
<input checked="" type="radio"/> ROLE 6	Yes	Yes	Yes	Yes	No	Yes	No
<input type="radio"/> ROLE 9	Yes	Yes	No	Yes	No	No	No

Close Modify Permissions

## Removing a Secondary User's Access

1. Select **Manage user access** from the account utility menu in the top right

Kaiser Permanente Employer

Region: California ▼ More Options ▼

Account information

**Manage user access**

Enter access code

Employer identification number

Sign off

Welcome to your Kaiser Permanente employer account



2. In the **Users with access** tab, click **Permissions** under the **Access rights** column.

**Manage user access**

**Users with access** | My account access

You are responsible for managing users who have access. Keep this list current by removing or updating access rights.  
If you'd like to allow another user to access your account information, select "Add a new user".

**Users (2)** View All users by status (2) + Add a new user

User ID	Name	Email address	Admin access	Access rights
PRFUSR802	EBSS PRFUSREIGHTZEROTWO	brokernettest@yahoo.com	No	<a href="#">Permissions</a>
UATUSR64	MAS User15	brokernettest@yahoo.com	No	<a href="#">Permissions</a>

3. Under the **Role** column, click **Remove** to remove the user's access. Please note, to remove the user's access to only certain groups/subgroups, click Remove for just the line item(s) corresponding to the groups/subgroup access you want to update.

[View all users](#)

**User details**

**User**  
EBSS PRFUSREIGHTZEROTWO

**User ID**  
PRFUSR802

**Delegate email address**  
[brokernettest@yahoo.com](mailto:brokernettest@yahoo.com)

**Access permissions for this user**  
To add this user, you must specify access and permissions for at least one group

**Permissions (1)** [Delete all](#) + Add permissions

Region	Group	Billing unit	Role
California	22782 - SUMMIT STATE BANK	ALL	PURCHASER ⓘ User <a href="#">Edit</a> <a href="#">Remove</a>



## Changing Group Information

Small Groups in California can update group phone number, fax, tax ID, website url, renewal delivery preference, contact information, and employer medical contribution in real time. This capability will also remain accessible from the group's renewal page.

### Changing group information (currently for CA Small Business only)

1. From the Employer Dashboard, scroll down to the Change CA Small Business Group Information section, select a group and click **Continue**.

**KAISER PERMANENTE** | Employer

Region: California | Employer A new H Intranet test new

Home | Manage Members | Manage Payments | Documents | Plans and Forms | Feedback | Help

Welcome to your Kaiser Permanente

**Primary group administrator**  
To manage your employer's Kaiser Permanente health plan membership, form OR print and complete this account services application (PDF). The form OR print and complete this account services application (PDF). The form OR print and complete this account services application (PDF).

**All Users**  
If you have received an access code, please enter your access code to link access code once.

**User Guide**  
For assistance with navigation, including help with delegating access, see reference the user guide (PDF).

Please review the notification regarding changes to Secure Messages and Click Here for Kaiser Permanente Mid-Atlantic, Maryland, Virginia and West Virginia.

**Enter Access Code**  
Enter your access code to link your group information to your online account. You will only need to enter the access code once.

**Change CA Small Business Group Information**  
Select the group whose information you'd like to change.

You can update the following information:

- Group phone, fax, tax ID, and website
- Group renewal delivery preference
- Contact information
- Employer medical contribution

Region  
California

Group  
Select a group

Continue

2. You will be navigated to the group information screen where you can select the type of information you want to change and follow the prompts to update and save the new information.

Home | [User ID] | [Group ID] | [Group Name]

Review your group information, and if you'd like to make any changes, check the box next to the information you'd like to change and click Next.

**About Business**

PHONE: [Phone Number] FAX: [Fax Number]

FEDERAL TAX ID (EIN) NUMBER OR DOTS: [Tax ID] WEBSITE: [Website]

**Renewal Delivery Preference**

RENEWAL DELIVERY PREFERENCE: [Web (Online)]

We encourage you to keep Web delivery as your preference to help Kaiser Permanente "go green" and reduce costs.

**Medical Contribution Details**

CONTRIBUTION TYPE: [CONTRIBUTION TO EMPLOYEES] MEDICAL PREMIUM: [Medical Premium]

CONTRIBUTION TO DEPENDENTS: [Contribution to Dependents] MEDICAL PREMIUM: [Medical Premium]

ASSIGNMENT TO: [Assignment to]

**Contact Change Request**

To review Contact demographic information, click + icon to expand Contact Details.

Contract Signer: [Contract Signer]

Billing Contact: [Billing Contact]

Save | Saved 6/30/2023 2:50 PM PST | Cancel | Close | Next





## Broker Book of Business group information change (CA Small Business only)

1. From the Broker Dashboard click **View all Book Of Business**.

The screenshot shows the Kaiser Permanente Broker Dashboard. At the top, there's a navigation bar with 'Dashboard', 'Book of Business', 'Plans and Resources', and 'Working with KP'. Below this, the 'Your Dashboard' section includes a 'View Recent Transaction' button. The 'Book Of Business' section features a search bar for clients and a 'View all Book Of Business' link, which is highlighted with a red box. To the right, there are buttons for 'Get Small Business Quote' and 'Enroll Small Business'.

2. On the Small Business tab on Book of Business page, use the **More Details** dropdown menu to select the **Change group information** option.

The screenshot shows the 'Book of Business' page. The 'Small Business' tab is selected and highlighted with a red box. Below the tabs, there's a table of business entries. The 'More Details' dropdown menu is open, showing options like 'Choose one', 'Group details', 'Contracts', 'Renewals', 'Group documents', 'Manage members', and 'Change group information'. The 'Change group information' option is highlighted with a red box.

3. You will be navigated to the group information screen where you can select the type of information you want to change and follow the prompts to update and save the new information.

The screenshot shows the 'About Business' screen. It contains several sections for updating information: 'About Business' (Name, Address, Phone, Fax), 'Renewal Delivery Preference' (Renewal delivery method, Help), 'Medical Contribution Details' (Contribution type, Contribution amount, Medical plan, Lowest cost plan), and 'Contact Change Request' (Contact type, Contact name, Billing contact). At the bottom, there are 'Save', 'Cancel', and 'Next' buttons.



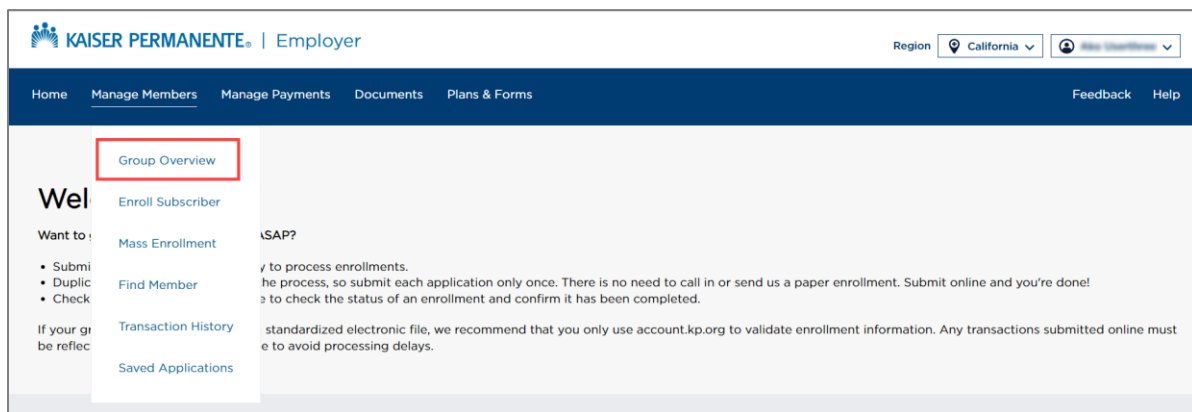
## Manage Members

The Manage Members tools support membership transactions such as processing enrollments and terminations, adding family members, and requesting ID cards. Users can track all changes submitted online in Transaction History and download member lists in spreadsheet format for easy billing reconciliation. Check out our [Manage Members Overview](#) video to see the benefits of making enrollment changes online.



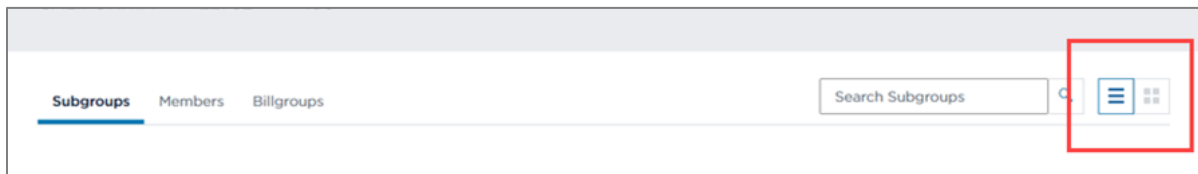
Watch the [Navigating Manage Members](#) video for a quick tour.

## Group Overview



From any screen, users can access the Manage Members dropdown at the top of the page to view groups they have access to by selecting **Group Overview**.

**NOTE:** Users can click on the buttons next to the Search Groups field to toggle from list (shown below on left) to card view (shown below on the right).





## Finding a Specific Group

Watch the [Finding a Group / Subgroup](#) video.

To find a specific group:

1. Navigate to the Group Overview page which lists all the user's groups.
2. Use the Manage Members dropdown menu in the blue header to select **Group Overview**.
3. On the Group Overview page, use the search or filter features to quickly find the group you're looking for.
  - Use the search field to find a group by name or ID number.

- Use the filters to sort your results by group name, ID number or region.

Inside the Group Overview:

- Subgroups tab – Displays all subgroups/billing units listed under the group
- Members tab – Displays all the members listed under the group. The list contains active, pending and terminated members. (Groups with membership of 2000 and above will see a **Find Members** tab where users can search for a member)
- Billgroups tab – Displays all billgroups listed under the group



## Downloading Member Lists

Watch the [Downloading Member Lists](#) video.

Download a member list at the group, subgroup or billgroup level. The list will be in spreadsheet format for easy sorting, and will contain the following information:

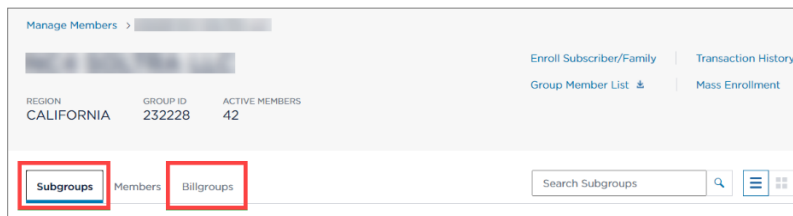
- First Name and Last Name
- Account Role
- Group region
- Group ID, Subgroup ID, and/or Billgroup ID (the list will correspond with the page in which the member list is downloaded)
- DOB
- Gender
- Coverage effective dates
- Subscriber and Member SSN/HRN (SSN/HRNs are available *only* on the downloaded member list. SSN/HRNs are not viewable on the website)

1. Use the Manage Members dropdown in the blue header to visit your group list, then click on the group you're interested in to go to its **Group Page**.
2. Click **Group Member List** in the top-right corner of the page.



3. Click **Download** (or **Request Report** for larger groups) in the popup window.

**NOTE:** Member lists are also available at the subgroup or billgroup level. From the Group Detail page, select the subgroup or billgroup you're interested in and then click **Subgroup Member List** or **Billgroup Member List** in the top-right corner of the page. Click **Download/ Request Report** in the pop-up window.





**NOTE:** How you receive your member report will differ based on the group's membership size.

- Groups with 500 members or fewer – Report will download instantly.
- Groups with 501 - 9,999 members – Clicking **Request Report** will request a report that will appear on the Transaction History page. Typical processing time is 5-10 minutes, but larger groups may take up to 30 minutes.
- Groups with 10,000 or more members – See your account manager or representative for a member list.

## Enrolling a Subscriber (And/or Family Member)

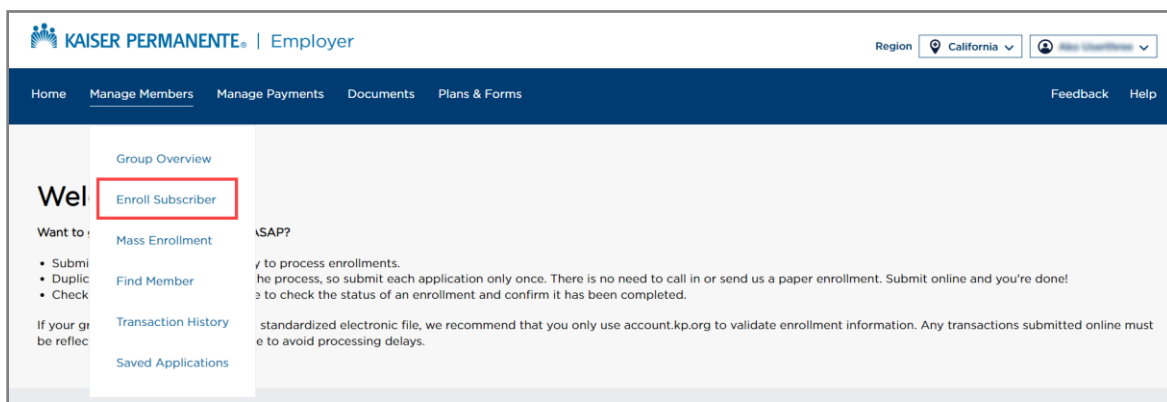
How to add a subscriber and their family members to your group coverage.

 Watch the [Enrolling a Member or Family Member](#) video.

 Watch the [Uploading a Member Arbitration Agreement](#) video. (CA & HI only)

There are two ways to begin the enrollment process:

Option A. From the Manage Members dropdown in the blue page header, select **Enroll Subscriber**.





Option B. On the Group, Subgroup, or Billgroup list pages, select the unit you want to enroll into, and select **Enroll Subscriber/Family** from the Actions dropdown. The Enroll Subscriber/Family link is also available on the page in the top-right corner of the screen.

Subgroups Members Billgroups				
Search Subgroups				
NAME ▾	SUBGROUP ID ▾	COBRA ▾	ACTIVE MEMBERS ▾	ACTIONS
SUMMIT STATE BANK/G250-35	1	No	94	<div> View Subgroup </div>
SUMMIT STATE BANK/SHD2500-20	2	No		<div> Enroll Subscriber/Family </div>
SUMMIT STATE B/SHD2500/COBR	7002	Yes		<div> Transaction History </div>

Complete the following information for the subscriber/family:

- For **Coverage**, enter the subscriber's coverage information and click **Next**.
- For **Subscriber**, enter the subscriber's demographic information and click **Next**.
- For **Family Members**, to add Family Members by clicking **Yes** or **No**.
  - If Yes is selected, enter the family members' demographic information and click **Next**. To add additional family members, click **Add Additional Family Member** before clicking **Next**.
  - If No is selected, click **Next**.
- For **Arbitration Agreement** (CA & HI regions only), select **Maintain Agreement** or **Upload Agreement** to upload a paper copy and click **Next**.
- Review the application once entry is complete. Click **Edit** in the appropriate section to modify the application. To enroll members, click **Enroll Members**.
- The Confirmation page confirm the enrollment was submitted successfully. A confirmation ID will be provided.



## Saving an Enrollment Application

The Saved Application feature allows you to save an enrollment application for completion at a later time. Saved applications are retained for 30 days.

1. Once you have completed the first step in the enrollment application, the Save Application button will appear in the top-right corner of the screen.
2. Click Save Application to save your progress on this application for 30 days.

The screenshot shows the Kaiser Permanente Employer portal. The top navigation bar includes 'Home', 'Manage Members', 'Manage Payments', 'Documents', and 'Plans & Forms'. The 'Enrollment Application' page is displayed, with a sidebar on the left showing steps: Coverage, Subscriber, Family Members, Arbitration Agreement, Review, and Confirmation. The 'Subscriber' step is active. The main form area is titled 'Subscriber Information' and contains input fields for 'FIRST NAME' (with 'TEST' entered), 'MIDDLE INITIAL (OPTIONAL)', and 'LAST NAME' (with 'TEST' entered). In the top right corner, a 'Save Application' button is highlighted with a red box, next to a 'Cancel' button.

3. To start working on saved applications again, click **Saved Applications** from the Manage Members dropdown. Selecting the Saved Applications menu item will present a list view of any saved enrollment forms in progress.

The screenshot shows the Kaiser Permanente Employer portal with the 'Manage Members' dropdown menu open. The menu options are: Group Overview, Enroll Subscriber, Mass Enrollment, Find Member, Transaction History, and Saved Applications. The 'Saved Applications' option is highlighted with a red box. The background shows the 'Enrollment Application' page with the 'Subscriber' step active.



## Adding Family Member to an Existing Subscriber Account



Watch the [Enrolling a Member or Family Member](#) video.

To add a family member after the initial subscriber is already enrolled by:

1. Locate the existing subscriber using the [Find Member](#) option in the Manage Members dropdown menu.
2. Click the subscriber's name to access the member's detail page displaying Personal and Coverage Information.
3. Click **Add Family Member** in top-right corner of the screen.

4. Complete the family member information and click **Submit**.

**NOTE:** You can also add family members from the Members tab on group or subgroup pages. Find the applicable subscriber's name, then select **Add Family Member** from the Actions dropdown menu. Complete the family member information and click **Submit**.

NAME	SSN	DOB	STATUS	COVERAGE DATES	ACTIONS
+ Subscriber		11/20/1985	ACTIVE	07/01/2021 - 12/31/2021	<div>           View Member  <b>Add Family Member</b>            Terminate Subscriber            Request ID Cards            Transaction History            Subgroup Transfer            Reinstate Subscriber         </div>
+ Subscriber		06/20/1985	ACTIVE	07/05/2021 -	
+ Subscriber		03/28/1998	ACTIVE	07/28/2021 -	
+ Subscriber		08/12/1987	ACTIVE	09/01/2021 -	
+ Subscriber		08/10/1931	ACTIVE	09/01/2021 -	
+ Subscriber		09/23/1965	ACTIVE	04/01/2021 -	





## Transferring members to another subgroup

Move a member from one plan (subgroup) to another, without having to terminate and re-enroll. You can only transfer at the subscriber level and any associated family members will change plans automatically. Contract rules apply to subgroup transfers, so be aware of the allowable retroactivity timeframe when making changes with a past effective date.

 Watch the [Transferring Members Between Subgroups](#) video.

To transfer a member from one subgroup into another:

1. Find the subscriber you'd like to transfer by using the [Find Member](#) option in the Manage Members dropdown menu, or selecting them from the Member tab on the Group page.
2. Once you locate the subscriber, select Subgroup Transfer by doing one of the following:
  - Option A. Click on the Action Menu next to the subscriber's name and selecting the **Subgroup Transfer** option.
  - Option B. Click the member's name to go their Member page and clicking the **Subgroup Transfer** link in the top right of the page.
3. The Subgroup Transfer pop up screen will display the **Details** page. Review the information to confirm this is the correct member and click **Next**.
4. Select the subgroup the member is moving to in the **Transfer to Subgroup** dropdown menu. The **Transfer Reason** will automatically fill in as "Group Requested."

**Subgroup Transfer**

Select the Subgroup you want to transfer the Subscriber to. All active family members will be transferred along with the Subscriber

CURRENT SUBGROUP  
604 - [redacted]

↓

TRANSFER TO SUBGROUP (REQUIRED)  
605 - [redacted]

TRANSFER REASON (REQUIRED) ⓘ GROUP REQUESTED

COVERAGE START DATE (REQUIRED) ⓘ 12/01/2020  
MM/DD/YYYY

Cancel Next



5. Enter the member's **Coverage Start Date** for the new subgroup. Click **Next**.
6. In California and Hawaii only, you will need to have Member Arbitration Agreement on file. If you have one, click **Maintain Agreement**. If not, you will need to **Upload** an agreement here to continue.
7. Read the terms, click the checkbox to confirm you understand, then click **Transfer**.
8. You will receive a **Confirmation ID** on the last screen which you can use to track the status of your transfer request on the Transaction History screen. Once the request has been processed successfully, the status will read **Completed**.

### Terminating subscriber coverage

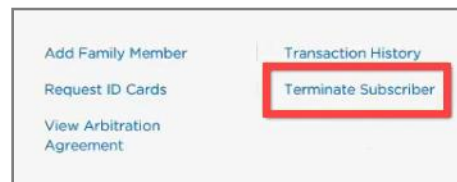
End coverage for a subscriber and/or family member. Note that ending coverage for the subscriber will end coverage for any associated family members as well. **NOTE:** The effective date you select will be the last day this member has coverage. Be sure to choose this date carefully, as our system will not adjust this date according to start or end of the month conventions.

 Watch the [Terminate Member Coverage](#) video.

To stop coverage for a member:

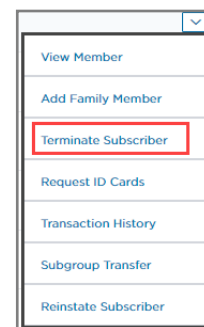
**Option A.** From any screen, click the Manage Members dropdown at the top of the page and select **Find Member**.

1. Click the member's name to access the member detail screen.
2. Select **Terminate Subscriber** or **Terminate Member** in the menu options located in the top-right corner of the screen.
3. Complete termination reason and effective date and click **Submit**.



**Option B.** From the group, subgroup, or billgroup pages, click the **Members** tab and locate the applicable person. Use the search or filter tools to help find the member quickly.

1. From the Actions dropdown of the applicable member, select **Terminate Subscriber** or **Terminate Member**.
2. Complete the required fields and click **Submit**.



## Reinstating terminated coverage



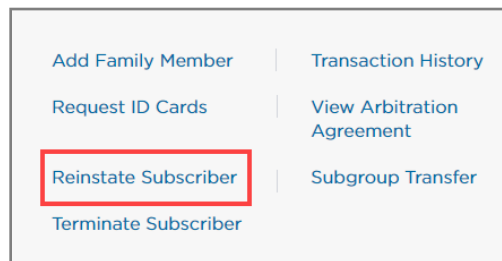
Reactivate a subscriber or family member who had lost coverage, without having to complete the data entry associated with the full re-enrollment process.



Watch the [Reinstating Members with Terminated Coverage](#) video.

To reinstate a terminated member:

1. Find the member you want to reinstate using the [Find Member](#) option in the Manage Members dropdown menu, or select them from the Member tab on the Group page.
2. Once you find the member, select Reinstating a member by doing one of the following:  
Option A. Click the member's name to go their Member page, then click the **Reinstate Subscriber / Reinstate Member** link in the top right of the page



Option B. Click the Action Menu next to the member's name, then select the **Reinstate Subscriber / Reinstate Member** option

Subgroup Members						Filter	Search Members	
NAME	SSN	DOB	STATUS	COVERAGE DATES	ACTIONS			
+ Subscriber		11/20/1985	ACTIVE	07/01/2021 - 12/31/2021				
+ Subscriber		06/20/1985	ACTIVE	07/05/2021 -				
+ Subscriber		03/28/1998	ACTIVE	07/28/2021 -				
+ Subscriber		08/12/1987	ACTIVE	09/01/2021 -				
+ Subscriber		08/10/1931	ACTIVE	09/01/2021 -				
+ Subscriber		09/23/1965	ACTIVE	04/01/2021 -				

View Member  
Add Family Member  
Terminate Subscriber  
Request ID Cards  
Transaction History  
Subgroup Transfer  
**Reinstate Subscriber**



3. The reinstatement pop up screen will display the **Details** page. Review the information to confirm this is the correct member and click **Next**.
4. The reinstatement will be set to the original **Coverage Start Date** and the reinstatement reason should be prefilled as Group Requested. Click **Next**.

**NOTE:** If a different date is needed, the user must follow the enrollment process instead.

5. In California and Hawaii only, you will need to have Member Arbitration Agreement on file. If you have one, click **Maintain Agreement**. If not, you will need to **Upload** an agreement here to continue.
6. Read the Terms shown, using the scroll bar on the right. Click the checkbox stating your understanding of the terms and click **Submit**.
7. You will receive a **Confirmation ID** on the last screen which you can use to track the status of your reinstatement request on the Transaction History screen. Once the request has been processed successfully, the status will read **Completed**.

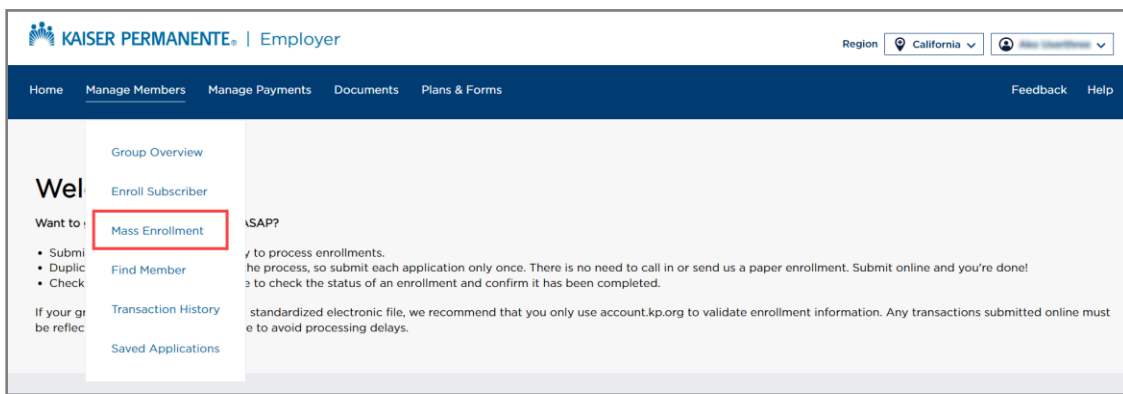


## Enrolling multiple members at once

Use the specially formatted Mass Enrollment spreadsheet to fill in multiple applications simultaneously. Review individual applications as needed or submit them all with one click. Note, there is no limit to how many files you can upload within a 24-hour period, however, each file must have a maximum of 250 members per group when using the Mass Enrollment feature.

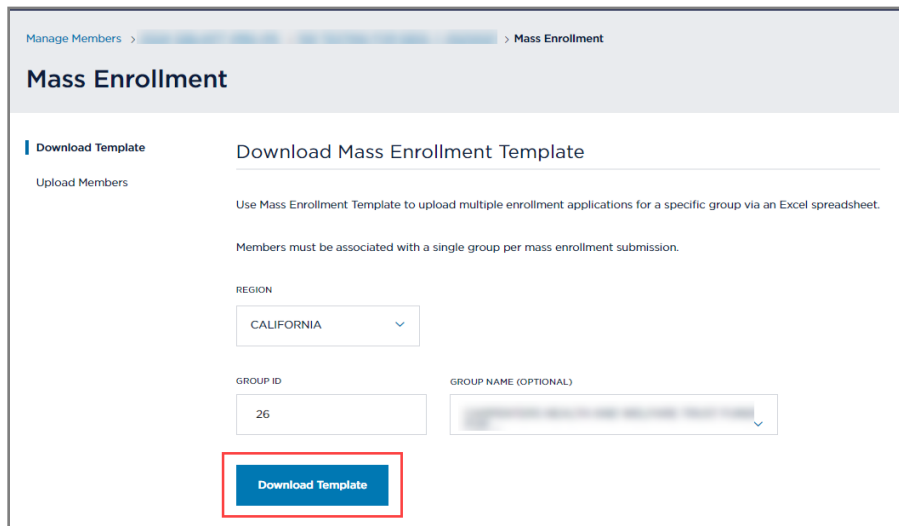
 Watch the [Enrolling Multiple Members at Once](#) video.

1. Click **Manage Members** at the top of any screen and click **Mass Enrollment**.



The screenshot shows the Kaiser Permanente Employer portal. The top navigation bar includes 'Home', 'Manage Members', 'Manage Payments', 'Documents', and 'Plans & Forms'. The 'Manage Members' dropdown menu is open, showing options like 'Group Overview', 'Enroll Subscriber', 'Mass Enrollment' (highlighted with a red box), 'Find Member', 'Transaction History', and 'Saved Applications'. The 'Mass Enrollment' option is also highlighted in the main content area.

2. Enter the Region and Group ID, then click **Download Template** to download a customized spreadsheet template.



The screenshot shows the 'Mass Enrollment' page. The 'Download Template' button is highlighted with a red box. The page includes a 'Download Mass Enrollment Template' section with instructions: 'Use Mass Enrollment Template to upload multiple enrollment applications for a specific group via an Excel spreadsheet. Members must be associated with a single group per mass enrollment submission.' Below this, there are input fields for 'REGION' (set to CALIFORNIA), 'GROUP ID' (set to 26), and 'GROUP NAME (OPTIONAL)'. The 'Download Template' button is located at the bottom of the form.



3. Complete the spreadsheet in Excel as directed. Just fill in member data; please do not modify the spreadsheet in any other way or the automatic upload will not work. If you need additional information about completing the spreadsheet, see the instruction tab included within the template.
4. Return to the Mass Enrollment screen once the spreadsheet is complete. Select the region and group ID, then drag and drop the Excel file or click **Select File to Upload** to upload the spreadsheet.

GROUP ID

GROUP NAME (OPTIONAL)

OR

All Groups

Drag and drop a file to upload

OR

Select File to Upload

5. Click **Upload Members**.
6. When the upload is complete, a popup message will appear indicating how many applications are ready for submission, contain errors, or were rejected. Click **Close** to proceed.

All members have been uploaded

Next Steps: Please review and correct your uploaded members and submit their applications.

✓ 1 Applications Ready to Submit

⚠ 2 Applications with Errors

⊘ 0 Applications Rejected

Close

7. Click the tabs at the top of the page to review the submitted applications:

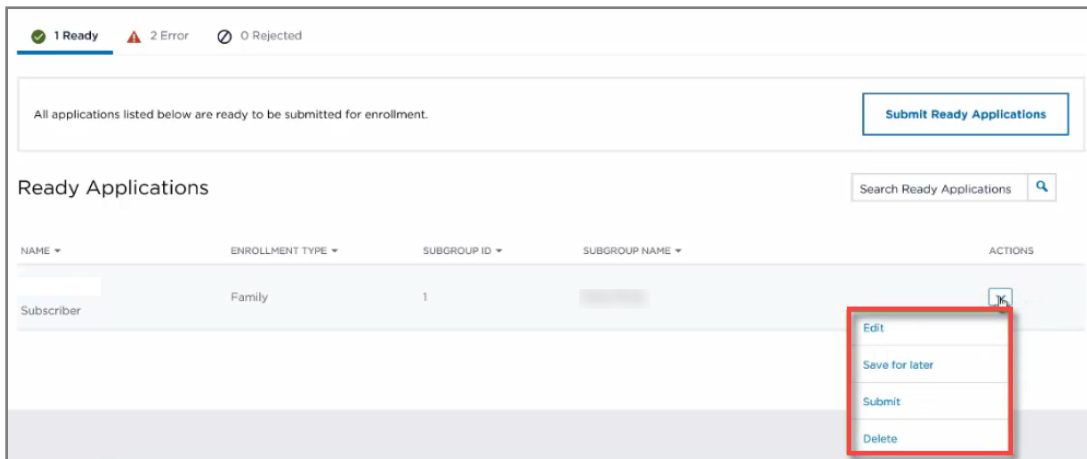
✓ 1 Ready

⚠ 2 Error

⊘ 0 Rejected



- a. **Ready** – The Ready tab will show each application that is ready for submission. Users can review and submit each application individually, or submit all at once by clicking **Submit Ready Applications**.
  - i. To review or update an application, click the **Actions** dropdown menu on the right side of the application to Edit, Save for later, Submit, or Delete.



- ii. Once submitted, a message will appear showing the number of applications that have been submitted successfully. A Confirmation ID is assigned to each application for tracking purposes and can be reviewed on the Transaction History page.
- b. **Error** – The Error tab will show a list of applications that contain errors.
  - i. To discard all applications that errored out, click **Delete All Error Applications**.
  - ii. To fix errors, click the Actions dropdown on the right side of the application and click **Edit** to make changes and then click **Submit Application**, or **Save for later** to make corrections later.
- c. **Rejected** – The Rejected tab will show a list of applications that cannot be accepted. Most applications are rejected because the member is already enrolled, the subgroup/billgroup ID is invalid, or the user's access does not allow them to modify the group/subgroup/billgroup.
  - i. Click the Actions dropdown to delete the application or review rejection reasons.



## Find a Member

Locate a subscriber or family member from any screen.



Watch the [Finding a Member](#) video.

To find a member using the search feature do one of the following:

Option A: To find a member from any page

1. Click the Manage Members menu at the top of the page and select **Find Member**.

The screenshot shows the Kaiser Permanente Employer portal. At the top, there's a navigation bar with 'KAISER PERMANENTE | Employer' and a 'Region' dropdown set to 'California'. Below this is a secondary navigation bar with links: Home, Manage Members, Manage Payments, Documents, Plans & Forms, Feedback, and Help. The 'Manage Members' menu is open, showing options like Group Overview, Enroll Subscriber, Mass Enrollment, Find Member (highlighted with a red box), Transaction History, and Saved Applications. There's also a 'Want to' section with links for Submit, Duplicate, and Check.

2. Fill in known member information to search for matching records. Start with region and group ID, then complete one or more of the starred fields for the best results.

The screenshot shows the 'Find Member' search form. At the top, it says 'Manage Members > Find Member'. The title 'Find Member' is followed by the instruction: 'Search for any member within a specific region or group. Complete the fields below using the information you have available.' Below this, there's a section 'Complete the following required fields.' with four dropdown menus: REGION (highlighted with a red box), GROUP ID (highlighted with a red box), SUBGROUP ID (OPTIONAL), and BILL GROUP ID (OPTIONAL). Each dropdown has a 'SELECT' button. Below these, there's a section 'Please fill out any additional fields below including at least one starred field.' (highlighted with a red box). This section contains several input fields: FIRST NAME, LAST NAME\*, DOB (MM/DD/YYYY), SSN\* (000-00-0000), GENDER (SELECT), and MEDICAL RECORD NUMBER\* (000000000). At the bottom left, there's a 'Search' button (highlighted with a red box).

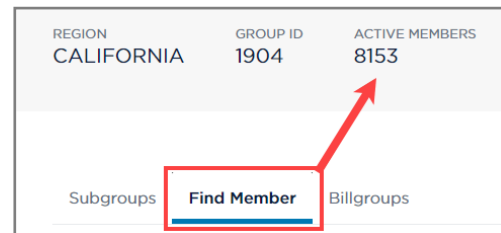
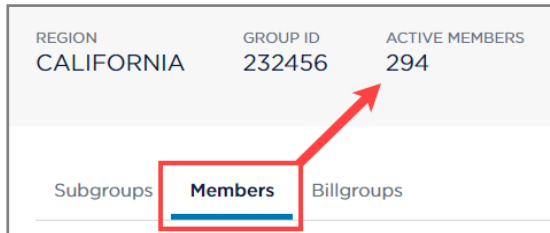




Option B: To find a member from the Group, Subgroup, or Billgroup pages:

1. Click the **Members** tab to open a list of subscribers and their family members. The list can be filtered and sorted using the options at the top of the tab.

**NOTE:** For groups with more than 2,000 members, the **Find Member** page will display. Using the search feature is faster than displaying and sorting a very long list of members.



## Updating Member Information

Make changes to personal or coverage information from the Member Information page.

 Watch the [Updating Member Information](#) video.

To update the **Personal Information** for a subscriber or family member:

1. Access the member to update by using **Find Member** from the Manage Members dropdown or from the Member List tab on the group, subgroup, or billgroup pages.
2. Click the subscriber's name to display the **Personal Information** screen.
3. Click **Edit** in the top-right corner to update.
4. Update information and click **Submit**.
5. To edit family member information, click **Coverage Information** to access family list of members to edit.



To update the **Coverage Information** for a subscriber or family member:

1. Access the member to update by using **Find Member** from the Manage Members dropdown or from any member list.
2. Click the subscriber's name to display the member detail screen.
3. From the left side of the screen, select **Coverage information**. Users may add additional family members or terminate the member and/or family members from this page.

Manage Members > [Member Name] [Member ID]

Subscriber [Subscriber Name]

Add Family Member | Transaction History  
Request ID Cards | Terminate Subscriber  
View Arbitration Agreement | Subgroup Transfer

Personal Information  
**Coverage Information**

**Coverage Information**

ROLE Subscriber	MEDICAL RECORD NUMBER ? ****-9381
STATUS ACTIVE	COVERAGE DATES 10/01/2020 -
REGION CALIFORNIA	GROUP ID 1904
SUBGROUP ID 222	SUBGROUP NAME [Redacted]

**Family Member Information** [Add Family Member](#)

NAME	DOB	MEDICAL RECORD NUMBER	STATUS	COVERAGE DATES
[Redacted]	09/21/2001	****-3977	ACTIVE	10/01/2020 - 01/01/2021

**NOTE:** For California, Colorado, Georgia, and Northwest (Oregon / Southwest Washington) regions: The DOB cannot be updated for members online. Above changes must be submitted to the Membership team for processing. For Hawaii region: Users can only edit the SSN, ethnicity, language preference and member address online. Any other personal information changes must be submitted to the Membership Team for processing.



## Requesting ID Cards

Order physical ID cards and have them sent directly to the member.



Watch the [Requesting a Replacement Member ID Card](#) video

There are two ways to request an ID:

**Option A.** From the Manage Members dropdown at the top of the page, select **Find Member** and search for the desired member. On the Member Information screen, click **Request ID Cards** in the top-right corner of the screen.

Manage Members > 22782 SUMMIT STATE BANK > Amitie C Kutchia

**Amitie C Kutchia**  
Subscriber

Buttons: Add Family Member, Request ID Cards (highlighted), View Arbitration Agreement, Transaction History, Terminate Subscriber, Subgroup Transfer

Personal Information

NAME	DOB	GENDER	SSN
Amitie C Kutchia	10/17/1982	FEMALE	***-**-1284

**Option B.** The user can also search for a member from the Member List tabs available under the group, subgroup, and billgroup pages. Select **Request ID Cards** from the Actions dropdown on the left side of the row.

**NOTE:** Members will receive their new ID cards within 7-10 business days.

NAME	SSN	DOB	STATUS	COVERAGE DATE	ACTIONS
+ Subscriber	***-**-3566	12/05/1975	Terminated	07/01/2014 - 10/31/2018	⌵
+ Subscriber	***-**-5701	05/16/1954	Active	07/01/2010 -	⌵
+ Subscriber	***-**-2364	10/14/1979	Active	07/01/2010 -	⌵
+ Subscriber	***-**-3601	06/20/1969	Active	07/01/2010 -	⌵

Actions dropdown for the last row:

- Add Family Member
- Terminate Subscriber
- Request ID Cards** (highlighted)
- Transaction History



## Viewing Manage Members Transaction History

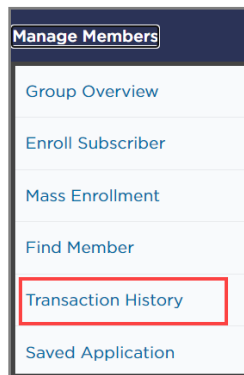
Displays all changes submitted online.



Watch the [Viewing Transaction History](#) video.

Access the Transaction History page by doing one of the following:

Option A. Select **Transaction History** from the Manage Members dropdown at the top of the page.



Option B. Use the **Transaction History** short cut on any group, subgroup, billgroup, or member page.



The Manage Members Transaction History tab will display all transactions submitted online. Note that the display will differ based on how you navigated to this page. If you click through from a subgroup page, for example, you will only see transactions for that particular subgroup.

- Select any transaction to see more details, including when the change was submitted and additional status information.
- Confirmation ID numbers are assigned to every transaction for tracking purposes.



- The Status column will display the status of each transaction.
  - **Completed:** Transactions that are successfully completed and Kaiser Permanente systems are updated accordingly.
  - **Work in Progress:** Transactions submitted to Kaiser Permanente and processing is currently in progress.
  - **Rejected:** Transactions submitted to Kaiser Permanente that are unable to be processed; a representative will contact the group to discuss next steps for processing.

Manage Members > Transaction History

### Transaction History

Manage Members Manage Payments

Search Transactions

CALIFORNIA

CONFIRMATION ID	SUBSCRIBER	TRANSACTION TYPE	STATUS	DATE CREATED
MAIN100001235929		Maintain	Completed	07/23/2024
MAIN100001235923		Maintain	Completed	07/23/2024
MAIN100001235922		Maintain	Completed	07/23/2024
MAIN100001235919		Maintain	Completed	07/23/2024

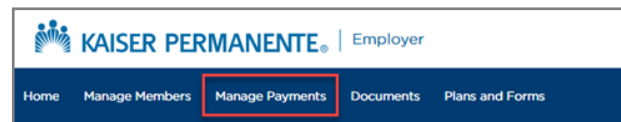


## Manage Payments

The Manage Payments tools support membership billing and payment by allowing users to view their statement and current balance, make a real-time payment, set up a one-time or autopay recurring payment, and upload a Self-Billed Payment Instruction File. Users can track all payments submitted online and view historical payments through Payment History, view Financial Activity, set up payment methods, and manage notification preferences. Check out our [Manage Payments Overview](#) video to see the benefits of managing your account online.

 Watch the [Manage Payments Navigation](#) video.

1. Click on Manage Payments in the menu at the top of the page.

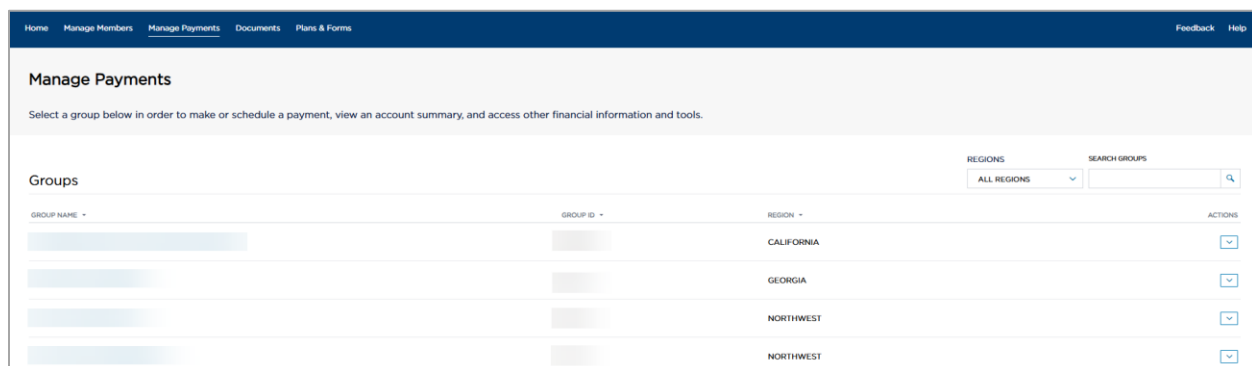


2. If you manage multiple groups, a Group List page will display. If you manage only one group, the page will open directly to that group's Account Summary page.



Multi-State: Please note if you have a Consolidated Invoice, you must select your lead region from the Group List page to add payment methods and make or schedule a payment on your account. The lead region is not specifically identified on your invoice or the Manage Payments screens. If you need to confirm your lead region, please reach out to your MAC or Account Manager.

### Multiple group page view





## Single group page view

Home Manage Members Manage Payments Documents Plans & Forms Feedback Help

Manage Payments >

REGION CALIFORNIA GROUP ID

View Invoices Self-Billed Payment Instruction  
Manage Payment Methods View Scheduled Payments  
Payer Profile Financial Activity  
Payment History Transaction History

To schedule a payment and receive bill notifications, an email address must be added to your profile. Please validate or add your email address in [Payer Profile](#).

Make or schedule a payment to one or more Bill Groups or Consolidated Billing IDs.

[Make or Schedule a Payment](#)

Account Summary Search Account Summary

BILL GROUP NAME / CONSOLIDATED BILLING ID NAME	BILL GROUP ID / CONSOLIDATED BILLING ID	INVOICE AMT	CURRENT BAL	DUE DATE	ACTIONS
		\$3,039.17	\$3,492.36	09/25/2024	<a href="#">Filter</a>

**NOTE:** The Payer Profile must be set up prior to making a payment. If alerted, click **Complete Payer Profile** to set up the Payer Profile. Once the Payer Profile has been created, the user will not see this alert.

**Set up Payer Profile**

Please set up a Payer Profile in order to receiving billing statements and notifications via email, and manage your preferences. You cannot proceed without completing a profile. Clicking on "Create Payer Profile" will automatically re-direct you to a new page.

[Create Payer Profile](#)



## Account Summary

The Account Summary page provides the user with high level information for all available Billing Units (BUs) or Bill Groups and the opportunity to perform actions on each of their accounts.



Multi-State: If you have a Consolidated Invoice, your consolidated account can be identified by the 10-digit Consolidated Billing ID in Account Summary. Select the “+” sign to display all groups and bill groups within the consolidation.

Account Summary Header: The header provides group information and group-level quick links for easy access to Manage Payments functions.

More detailed information for each page accessed from the quick links is provided in subsequent sections.

- [View Invoices](#)
- [Manage Payment Methods](#)
- [Payer Profile](#)
- [Payment History](#)
- [Self-Billed Payment Instruction File](#) (Self-Billed accounts only)
- [View Scheduled Payments](#)
- [Financial Activity](#)
- [Transaction History](#)





Payer Profile: Update and manage email notifications for E-Receipts, View Bill and Profile updates.

Make or Schedule a Payment: Make or schedule a payment for one or multiple Bill Groups / Consolidated Billing IDs by selecting this button. The screens displayed will walk users through the process.

Account Summary Table: Provides high level information by Bill Group / Consolidated Billing ID and option to perform actions by Bill Group / Consolidated Billing ID.

BILL GROUP NAME / CONSOLIDATED BILLING ID NAME	BILL GROUP ID / CONSOLIDATED BILLING ID	INVOICE AMT	CURRENT BAL	DUE DATE	ACTIONS
		\$5,039.17	\$3,492.36	09/25/2024	

- Bill Group /Consolidated Billing ID name
- Bill Group ID / Consolidated Billing ID
- Invoice amount – current invoice amount
- Current balance – real-time balance for Bill Group / Consolidated Billing ID
- Due date – current invoice due



- Actions – drop down menu options for viewing information or performing tasks by Bill Group / Consolidated Billing ID.

Account Summary					Search Account Summary
BILL GROUP NAME / CONSOLIDATED BILLING ID NAME	BILL GROUP ID / CONSOLIDATED BILLING ID	INVOICE AMT	CURRENT BAL	DUE DATE	ACTIONS
		\$3,039.17	\$3,492.36	09/25/2024	<div> <div></div> <div>View Account Details</div> <div>Make or Schedule a Payment</div> <div>Financial Activity</div> <div>Payment History</div> <div>Transaction History</div> </div>
		\$2,659.36	\$3,053.29	09/25/2024	
		\$3,210.29	\$3,684.85	09/25/2024	
		\$3,039.17	\$3,495.46	09/25/2024	
		\$2,660.36	\$2,037.64	09/25/2024	

## Managing your Payer Profile

The Manage Payer Profile page allows users to set up email notifications for the group.

 Watch the [Setting Up and Confirming Payer Profiles](#) video.

To manage the Payer Profile, click **Payer Profile** on the Account Summary page.

[Home](#)
[Manage Members](#)
[Manage Payments](#)
[Documents](#)
[Plans & Forms](#)

Feedback Help

Manage Payments >

REGION  
CALIFORNIA

GROUP ID

View Invoices

Self-Billed Payment Instruction

Manage Payment Methods

View Scheduled Payments

**Payer Profile**

Financial Activity

Payment History

Transaction History

To schedule a payment and receive bill notifications, an email address must be added to your profile. Please validate or add your email address to [Payer Profile](#).

Make or schedule a payment to one or more Bill Groups or Consolidated Billing IDs.

[Make or Schedule a Payment](#)



## Setting Up Email Notifications

1. Under **Notification Email Addresses**, enter the **Name** and **Email Address** of the individual who will receive the notification(s).

The screenshot shows the 'Payer Profile' page. The 'Notification Email Addresses' section is highlighted with a red box. It contains two input fields: 'Name\*' and 'Email Address\*'. Below these fields is a small square icon with a plus sign. The 'Profile Information' section shows 'Group Profile' with 'Group' and 'Group ID' fields. The 'Account Information' section shows 'Region', 'Group Name', and 'Group ID'. The 'Profile Information' section shows 'Profile Status' and 'Last Profile Update'. The 'Notification Actions' section shows 'Last Notification' and 'Notification Type'.

**NOTE:** To enter multiple email addresses, click the expansion [+] icon.

2. Click **Save & Continue**.
3. Confirm or select the email address from the Email Address dropdown.

The screenshot shows the 'Manage Notifications' page. The 'Add Notification Emails' section is highlighted with a red box. It contains a dropdown menu for 'Email Address' with 'Groupcontact@Contact.com' selected. Below this is a table with columns: Name, Email Address, E-Receipt Account(s), View Bill Account(s), and Profile. The 'E-Receipt' section shows '1 selected' and the 'View Bill' section shows '1 selected'.

4. For **E-Receipt** (Electronic Receipt), click **Select Account** to select a Bill Group to receive an email notification for online payments. Users can click **Check all** to get notifications for all Bill Groups.

The screenshot shows the 'Add Notification Emails' section. The 'E-Receipt' dropdown menu is open, showing options: 'Check all', 'Uncheck all', '01 - BILL GROUP1 ACTIVES', and '02 - BILL GROUP2 COBRA'. The 'E-Receipt' section shows '1 selected'.



5. Under **View Bill**, click on **Select Account** to select a Bill Group to receive an email notification when a premium bill is ready to view online. Users can click **Check all** to get notifications for all Bill Groups.

**Add Notification Emails**

Email Address Select Name E-Receipt Select Account View Bill 1 selected Profile

Name	Email Address	E-Receipt Account(s)	View Bill Account(s)	Profile
		04 - BILL GROUP4 DISABILITY 02 - BILL GROUP2 COBRA 03 - BILL GROUP3 RETIREE	<input checked="" type="checkbox"/> 01 - BILL GROUP1 ACTIVES <input type="checkbox"/> 02 - BILL GROUP2 COBRA	<input type="checkbox"/>

6. Mark the **Profile** check box to receive all other notifications. (ex. updates to scheduled payments, payment methods, etc.)

**Add Notification Emails**

Email Address  E-Receipt 4 selected View Bill 4 selected Profile ☐

Name	Email Address	E-Receipt Account(s)	View Bill Account(s)	Profile
		04-BILL GROUP4 DISABILITY 03-BILL GROUP3 RETIREE 02-BILL GROUP2 COBRA 01-BILL GROUP1 ACTIVES	04-BILL GROUP4 DISABILITY 03-BILL GROUP3 RETIREE 02-BILL GROUP2 COBRA 01-BILL GROUP1 ACTIVES	<input type="checkbox"/>

7. Click **Save**. All changes will be displayed for reference. If you do not see the accounts listed in the table (as shown below), this indicates the Payer Profile set up is not complete.

**Manage Notifications**

Account Information: Region, Group Name, Purchaser ID

Profile Information: Profile Status: Active, Last Profile Update: 08/27/2024

Notification Actions: Last Notification: 08/27/2024, Notification Type: Payer Profile-Profile Added

**Add Notification Emails**

Email Address Testtest@kp.org E-Receipt 51 Selected View Bill 51 Selected Profile ☐

Name	Email Address	E-Receipt Account(s)	View Bill Account(s)	Profile
Test	Testtest@kp.org			<input type="checkbox"/>

Back Cancel Save



## Editing Email Notifications

1. To edit email notifications, click **Payer Profile** on the Account Summary page.
2. On the Payer Profile screen, confirm information is correct and click **Save & Continue**.
3. Select the address to be edited from the Email Address dropdown.

4. Under **E-Receipt** and **View Bill**, any notifications previously checked will be marked by default. Mark or unmark checkboxes as needed to adjust the notifications received.
5. Click **Save**. All changes will be displayed for reference.

## Deleting Email Notifications

1. To delete an email from the Payer Profile, select the trash icon.



2. A prompt will appear to confirm deletion. Click **Confirm** to delete.

**Payer Profile**

The contact will be deleted.

[Cancel](#)
[Confirm](#)

3. Click **Save & Continue**.

Notification Email Addresses

Name*	Email Address*	
<input type="text"/>	<input type="text"/>	✖
<input type="text"/>	<input type="text"/>	+

Cancel
Save & Continue

## Managing Payment Methods

A stored payment method is required to pay your invoices online.

1. To manage the payment method, select the **Manage Payment Methods** link on the Account Summary page.

Home   Manage Members   **Manage Payments**   Documents   Plans & Forms
Feedback   Help

Manage Payments >
Account Summary

REGION  
CALIFORNIA

GROUP ID

<a href="#">View Invoices</a>  <div style="border: 2px solid red; padding: 2px; display: inline-block;">Manage Payment Methods</div>  <a href="#">Payer Profile</a>  <a href="#">Payment History</a>	<a href="#">Self-Billed Payment Instruction</a>  <a href="#">View Scheduled Payments</a>  <a href="#">Financial Activity</a>  <a href="#">Transaction History</a>
--	---



## Adding a Payment Method



**Multi-State:** If you have a Consolidated Invoice, you now have the option of paying your monthly invoice online through your lead region. When setting up your **Payment Method** online, you must select your lead region from the **Group List** page and set up the bank account through your lead region. Consolidated invoice customers who wish to continue paying via other methods will need to provide remittance instructions with one of the payment methods outlined in [Consolidated Invoices](#).

The screenshot displays the 'Manage Payment Methods' interface. At the top, there are tabs for 'Account Information', 'Profile Information', and 'Notification Actions'. Below these, there are sections for 'My Accounts' and 'Add Payment Method'. The 'Add Payment Method' section contains the following fields:

- Group Name\*
- Account Type\*
- Default Method ☐
- Routing Number\*
- Account Number\*
- Re-Enter Account Number\*
- Nickname

A red box highlights the fields marked with an asterisk (\*), indicating they are required. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

**NOTE:** All fields marked with \* are required and must be completed to schedule a payment.

1. Select the **Account Type**, Checking or Savings (Credit card payments are not accepted)
  - a. If the bank account will be the default payment method, mark the **Default Method** checkbox.
2. Enter the bank **Routing Number**, checking/savings **Account Number**
3. Optionally, the user may give the account a **Nickname**.
4. Click **Save**.



### Editing an Existing Payment Method

1. Click on Manage Payment Methods.
2. Click on the pencil icon.
3. Edit the information and click **Save**.



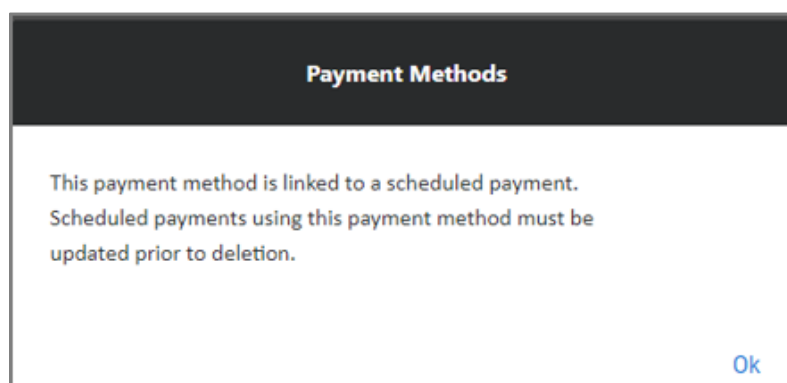
### Deleting an Existing Payment Method

1. Click the trash can icon.
2. Click **Confirm** and **OK**.



### Deleting a Payment Method Linked to a Recurring Payment Setup

**IMPORTANT:** If a payment method is linked to any auto-payments or scheduled one-time payments, the pop up below will appear when deleting. Make sure to update all scheduled payments with the new payment method prior to deleting the old method or the pop-up below will appear.







## Viewing and Downloading Invoices

Invoices within a 36-month period may be viewed and printed online. If your group receives a **consolidated invoice** be sure to [read this section](#).

1. From the link in the page headers, click **View Invoices**. Invoices can also be accessed by clicking **Documents** in the upper banner, next to Manage Payments.

The screenshot shows the 'Manage Payments' section of the user interface. The top navigation bar includes 'Home', 'Manage Members', 'Manage Payments', 'Documents', and 'Plans & Forms'. The 'Manage Payments' section is active, showing a breadcrumb trail 'Manage Payments > Account Summary'. On the right, a menu lists several options: 'View Invoices' (highlighted with a red box), 'Self-Billed Payment Instruction', 'Manage Payment Methods', 'View Scheduled Payments', 'Payer Profile', 'Financial Activity', 'Payment History', and 'Transaction History'. The left sidebar shows 'REGION CALIFORNIA' and 'GROUP ID'.

2. From the Invoices page, click an invoice to download from the **Actions** column.

The screenshot shows the 'Invoices' page. The top navigation bar includes 'Home', 'Manage Members', 'Manage Payments', 'Documents', and 'Plans & Forms'. The 'Documents' section is active, showing a breadcrumb trail 'Documents > Invoices'. The left sidebar shows 'REGION CALIFORNIA' and 'GROUP ID'. The main content area is titled 'Invoices' and includes a note: 'For customers with consolidated invoices, the parent bill group for the invoice is provided. Invoices associated to plans with no membership are not generated.' Below this is a table with columns: 'DATE', 'NAME', 'BILL GROUP ID & NAME / CONSOLIDATED BILLING ID & NAME', and 'ACTIONS'. The table contains two rows of invoice data. In the 'ACTIONS' column, the 'Download XLSX' and 'Download PDF' links are highlighted with a red box.

DATE	NAME	BILL GROUP ID & NAME / CONSOLIDATED BILLING ID & NAME	ACTIONS
07/11/2025	Invoice for Activity through 08/11/2024	[Redacted]	Download XLSX Download PDF
07/11/2025	Invoice for Activity through 08/11/2024	[Redacted]	

Invoices are sorted most recent at the top by default. The invoice list can be filtered based on **Bill Group ID / Consolidated Billing ID and Name** or **Date**.



## Making or Scheduling Payments

Users can set up a recurring monthly payment (autopay) or set up a one-time payment to process on a future date.



**Multi-State:** If you have a Consolidated Invoice, you now have the option of paying your monthly invoice online through your lead region. When making or scheduling a payment online, you must select your lead region from the **Group List** page.

## Scheduling a Recurring Payment (Autopay)



Watch the [Setting Up and Managing Autopay](#) video.

1. Set up a recurring, monthly, automatic payment by clicking the **Make or Schedule Payment** button on the Account Summary page. Users can also use the Make or Schedule a Payment option from the Action dropdown menu of any Bill Group / Consolidated Billing ID in the Account Summary table.

The screenshot shows the 'Manage Payments' section of the account summary page. It includes a 'REGION' dropdown set to 'CALIFORNIA' and a 'GROUP ID' field. A red box highlights the 'Make or Schedule a Payment' button. To the right, there are links for 'View Invoices', 'Self-Billed Payment Instruction', 'Manage Payment Methods', 'View Scheduled Payments', 'Payer Profile', 'Financial Activity', 'Payment History', and 'Transaction History'. A note at the bottom states: 'To schedule a payment and receive bill notifications, an email address must be added to your profile. Please validate or add your email address in Payer Profile.'

2. On the Payment Type and Bill Groups page, select **Set up recurring automatic payments (autopay)**.

The screenshot shows the 'Make or Schedule a Payment' page with the Kaiser Permanente logo. The page has a sidebar with steps: 'Payment Type & Bill Groups' (selected), 'Amount, Method & Date', 'Review', and 'Confirmation'. The main content area is titled 'Payment Type & Bill Groups' and includes the instruction 'All fields are required, except where marked as optional.' Under the 'Payment Type' section, the question 'What type of payment would you like to make?' is followed by three radio button options. The first option, 'Set up recurring automatic payments (autopay)', is selected and highlighted with a red box. The other two options are 'Make a one-time payment now' and 'Schedule a one-time payment for a future date'.



3. Select the Bill Group(s) / Consolidated Billing ID(s) to be included in the payment series and click **Continue**.

**Bill Group ID / Consolidated Billing ID**

Select one or more bill group IDs or consolidated billing IDs to make a payment. To continue, at least one Bill Group or Consolidated Billing ID must be selected.

Search Bill Groups

INVOICE AMT	CURRENT BAL	DUE DATE
<input checked="" type="checkbox"/> \$2,163.80	\$2,153.96	09/25/2024
<input checked="" type="checkbox"/> \$1,858.88	\$1,291.80	09/25/2024
<input checked="" type="checkbox"/> \$2,163.80	\$1,548.91	09/25/2024

Cancel **Continue**

4. On the Amount, Method & Date screen, select the **Payment Method** to use for monthly payments. **NOTE:** the payment amount shown is always the full invoice amount for each billing period and cannot be changed.

**Make or Schedule a Payment**

Payment Type & Bill Groups Amount, Method & Date

Amount, Method & Date

All fields are required, except where marked as optional.

Review

Confirmation

**Autopay Amount**

MONTHLY AUTOPAY AMOUNT  
Invoice amount

NEXT DUE DATE  
07/25/2024

Monthly autopay amounts may vary - payments will always cover the total amount due on your monthly invoice.

**Payment Method**

Select a payment method for this autopay series.

- ☒ ACH - 7895
- ☐ ACH - 6789
- ☐ ACH - 9876
- ☐ ACH - 7891
- ☐ ACH - 9321
- ☐ ACH - 7890

5. In the Autopay Schedule section, **Start Date** will default to today's date. Use the date picker to select the payment date. For **Monthly Payment Date**, select the number of days prior to the invoice payment Due Date the payment should be processed.
6. Select whether to continue the series indefinitely or set an end date for the payment series and click **Continue**.

**NOTE:** We recommend setting automated payments to at least 4 days prior to the invoice Payment Due Date to be reflected on the next invoice.



7. The review screen allows for a final review prior to submission. To edit from this screen, select the blue hyperlinks, **change payment method** and **change payment schedule**, and update selections as needed.
8. Once information is validated, click the checkbox to **accept the Terms & Conditions** and click **Submit**.
9. The Confirmation screen will confirm your submitted autopay including a link to view Transaction History, a link to manage your autopay series (if needed), payment details, and E-Receipt recipients. Select **Done** to return to the Account Summary page.

## Scheduling a Future One-Time Payment



Watch the [Making, Scheduling & Managing One Time Payments](#) video.

1. To set up a one-time future scheduled payment, click the **Make or Schedule a Payment** button on the Account Summary page. Users can also use the **Make or Schedule a Payment** option from the **Action** dropdown menu of any Bill Group / Consolidated Billing ID in the Account Summary table.

2. On the Payment Type & Bill Groups page, select **Schedule a one-time payment for a future date** and choose the Bill Group(s) for the future scheduled payment. Click **Continue**.
3. On the Amount, Method & Date screen, select the **Payment Amount** (invoice amount, current balance, or customize the amount by each bill group selected), **Payment Method**, and the **Payment Date** (enter or use the calendar picker). Click **Continue**.
4. The review page allows for a final review prior to submitting the one-time future scheduled payment. The user can edit the scheduled payment by selecting the blue hyperlinks on the page, which includes **change payment amount**, **change payment method**, and **change payment date**.



5. Click the checkbox to **accept the Terms & Conditions** and then click **Submit**.
6. The Confirmation page will display confirmation of your scheduled payment including a link to Transaction History, payment details, and E-Receipt recipients. Select **Done** to return to the Account Summary page.

## Making a One-Time Payment



Watch the [Making, Scheduling & Managing One Time Payments](#) video.

1. A user can make a one-time, real-time payment by selecting the **Make or Schedule a Payment button** or selecting from the action drop down menu for the selected Bill Group / Consolidated Billing ID.

2. On the Payment Type and Bill Groups page, select **“Make a one-time payment now”** and the bill group(s) for the payment. Select **Continue**.
3. On the Amount, Method & Date page, select the **Payment Amount** (invoice amount, current balance, or customize the amount by each bill group selected). Select the **Payment Method**. Today’s date will default for payment date. Select **Continue**.
4. The review page allows for a final review prior to submitting the payment. The user can edit the payment by selecting the blue hyperlinks on the page, which includes change payment amount, change payment method, as well as adding an email address for an E-Receipt. Click the box to **accept the Terms & Conditions** and then **Submit**.
5. The Confirmation page will display confirmation of your submitted payment including a link to Transaction History, payment details, and E-Receipt recipients. Select **Done** to go back to the Account Summary page.



## Viewing, Editing and Deleting Scheduled Payments



**Multi-State:** When accessing scheduled payments, you must select your lead region and manage updates to scheduled payments from the **Group List** page.



Watch the [Making, Scheduling & Managing One Time Payments](#) video.

1. To view a future scheduled payment, click **View Scheduled Payments** on the Account Summary page.



2. Future scheduled payments will display all autopay and one-time scheduled payments. Select **Make or Schedule a Payment** button to set up a new payment.

Actions available for editing an autopay:

- **Edit Autopay Series** – Click to modify the payment method and/or scheduled end date for the payment series
- **Skip Payment** – Click to skip the next scheduled payment in the series
- **End Autopay Series** – Click to delete the entire series and stop future payments from processing

Actions available for editing a one-time payment:

- **Edit Payment** – Click to modify the payment method. Payment date and/or payment amount cannot be edited here. To change the payment date or amount, delete the payment and schedule a new one.
- **Cancel Payment** - Click to delete the one-time payment



## Viewing Payment History

The Payment History page displays payments processed to your account across all payment methods. For groups in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington) who have not yet updated to the new user experience, Payment History will only show payments made online. Please refer to the [former online experience](#) section for this section.



Watch the [Viewing Payment History, Financial Activity, and Transaction History](#) video.

1. Click **Payment History** on the Account Summary page.



A list of all payments made to your account will display with the following information:

- **Payment Method** – The method used to make the payment
- **Bill Group ID / Consolidated Billing ID** – The ID the payment was applied to
- **Payment Date** – The date the payment was made
- **Amount** – The amount of the payment
- **Status** – The processing status of the payment

By clicking on the payment method name in the **Payment Method** column, you can view details about that payment.

Payment History					Search Payment History
					Filter <input type="text"/>
PAYMENT METHOD	BILL GROUP ID / CONSOLIDATED BILLING ID	PAYMENT DATE	AMOUNT	STATUS	
<a href="#">ACH Payment</a>		07/30/2025	\$1.00	Processed	
<a href="#">ACH Payment</a>		07/14/2025	\$1.00	Processed	
<a href="#">Cash</a>		02/13/2025	\$48,718.30	Processed	



### Voiding a Payment

Online payments may be voided same day only if **Void** is indicated in the Action or Status column. Please note it may take up to 30 minutes for the **Void Payment** link to appear after a payment is submitted.

**NOTE:** For groups in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington) who have not yet updated to the new user experience, please refer to the [former online experience](#) for this section.

1. Locate the payment and click **Void Payment** in the Status column.

Payment History				
<div> <div>Search Payment History</div> <div>Filter</div> <div></div> </div>				
PAYMENT METHOD ▾	BILL GROUP ID / CONSOLIDATED BILLING ID ▾	PAYMENT DATE ▲	AMOUNT ▾	STATUS ▾
Payment Method		08/12/2025	\$5,000.00	Processed <b>Void Payment</b>

2. Click **Yes** to proceed with voiding the payment.

1

Are you sure you want to void this payment?

The following bill group and amount will be voided if you proceed

BILL GROUP

(amount \$130.00)

No

Yes

3. A confirmation message will appear. It is recommended to check the Transaction History using the Confirmation ID for the status of the void request.

✓

**Your Request To Void Your Payment Has Been Submitted**

We're in the process of voiding your payment. To check the status, go to [Transaction History](#).

SUBMISSION DATE:

CONFIRMATION ID:

06/17/2024

VOID100000000555





## Viewing Financial Activity

Financial Activity allows users to see the date and amount the following financial-related transactions occurred: payment allocations, payment reversals, refunds, current dues, retro dues, discounts, and fees.

**NOTE:** For groups in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington) who have not yet updated to the new user experience, please refer to the [former online experience](#) for this section.



Watch the [Viewing Payment History, Financial Activity, and Transaction History](#) video.

1. To view all activity on your account including payment reversals, refunds, current dues, retro dues, discounts, and fees, click **Financial Activity** on the Account Summary page.



The page will display a list of all activities across your account with the following information:

- **Activity Type** – the type of activity that was applied to the account
- **Bill Group ID** – The Bill Group the activity was applied to. (**NOTE:** For consolidated billing accounts, this will show activity applied to any bill group, not just the lead account)
- **Activity Date** – The date the activity was applied to your account
- **Coverage Period** – The coverage period for which the activity was applied
- **Amount** – The dollar amount debited or credited to your account

2. Click the activity in the **Activity Type** column to view details for that activity.



Financial Activity				
Search Financial Activity <input type="text"/>				
<input type="button" value="Filter"/>				
ACTIVITY TYPE ▾	BILL GROUP ID ▾	ACTIVITY DATE ▾	COVERAGE PERIOD ▾	AMOUNT ▾
Payments		04/18/2024	05/01/2024 - 05/31/2024	-\$0.10
Payments		04/18/2024	05/01/2024 - 05/31/2024	-\$0.10
Payments		04/18/2024	05/01/2024 - 05/31/2024	-\$0.10
Payments		04/18/2024	05/01/2024 - 05/31/2024	-\$0.10

3. You can also filter based on types of activity by clicking the **Filter** button on the right. Mark all the activity types you want to see and click **Apply**. Activity types available in the filter are:

- Adjustments
- Current Dues
- Discounts
- Fees
- Payments
- Payment Reversals
- Refunds
- Retro Dues

## Viewing Transaction History for Manage Payments

Displays all changes submitted in Manage Payments.

 Watch the [Viewing Transaction History](#) video.

The Manage Payments tab under Transaction History will display all Manage Payments transactions submitted online. Access the Transaction History page by doing one of the following:

Option A. Select **Transaction History** option from the Manage Payments menu at the top of the page.

Option B. Use the **Transaction History** link on any group page or Bill Group/ Consolidated Billing ID dropdown menu.

[Home](#)
[Manage Members](#)
[Manage Payments](#)
[Documents](#)
[Plans & Forms](#)

[Feedback](#)
[Help](#)

Manage Payments >
Account Summary

REGION  
CALIFORNIA

GROUP ID

View Invoices
Manage Payment Methods
Payer Profile
Payment History

Self-Billed Payment Instruction
View Scheduled Payments
Financial Activity
Transaction History



**NOTE:** The items displayed will differ based on how you navigated to the Transaction History page. If you click through from a Bill Group / Consolidated Billing ID's drop down for example, you will only see transactions for that specific Bill Group / Consolidated.

- Select any transaction to see more details, including when the change was submitted and additional status information.
- Confirmation ID numbers are assigned to every transaction for tracking purposes.
- The Status column will display the status of each transaction.
  - **Completed:** Transactions that are successfully completed and Kaiser Permanente systems are updated accordingly.
  - **Complete with Exceptions:** This transaction was only partially completed, and you may need to re-submit transactions for Bill Groups that were not successfully submitted.
  - **Work in Progress:** Transactions submitted to Kaiser Permanente and processing is currently in progress.
  - **Rejected:** Transactions submitted to Kaiser Permanente that are unable to be processed. You may need to re-submit your entire transaction.

Manage Payments > > Transaction History

Transaction History

Manage Members

Manage Payments

Search Transactions

Filter

CALIFORNIA

CONFIRMATION ID	GROUP ID & NAME	TRANSACTION TYPE	STATUS	DATE CREATED
PYMT100000028067		Payment	Completed	05/03/2024
AUTO100000002938		Autopay	Rejected	04/30/2024
AUTO100000002937		Autopay	Rejected	04/30/2024
PYIF100010007295		Payment Instruction File	Completed	04/30/2024



## Submitting a Self-Billed Payment Instruction File

Online submission of Payment Instruction Files

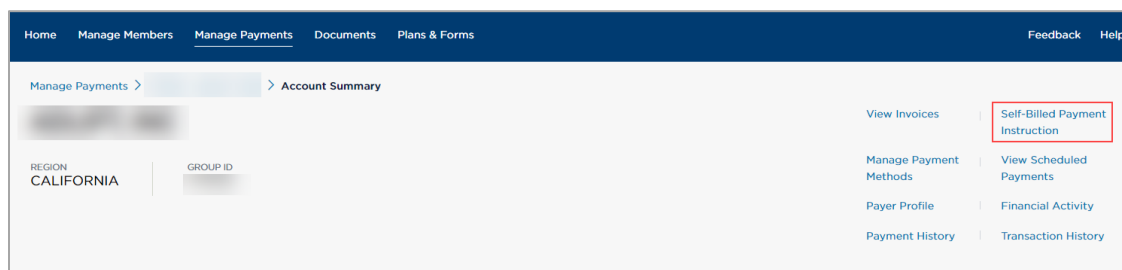


Watch the [Submitting a Payment Instruction File](#) video.

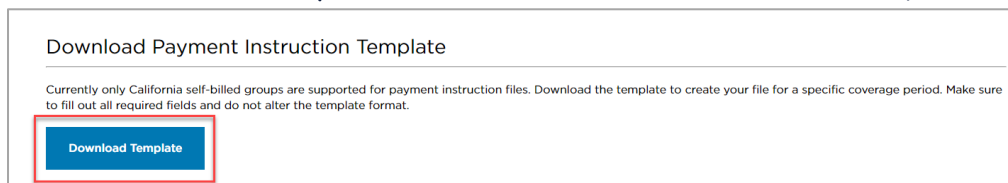
Self-Billed groups now have the option to submit their monthly Payment Instruction File online. A few things to note about submitting a file online:

- Submitting the file does not mean your account has been paid. It is simply the sending of the file with members to be billed for.
- If you submit your file online, you do not have to submit it via email.

1. From the link in the page headers, select **Self-Billed Payment Instruction**



2. Click the **Download Template** button to download a new, blank file to your computer.



3. Save the file and fill it out as you normally would. A few things to note about filling out the template:

- Do not change the name or the order of any of the columns. This will cause the file processing to fail.
- You must fill in all required fields.
- Do not leave blank rows of data.
- Do not leave any other tabs, including hidden tabs, in the template prior to submission. Doing so will cause the file processing to fail.



- When ready to submit the file, select the **Region** and **Group ID & Name** from the dropdowns, and upload your file.

### Upload Completed Payment Instruction File

If your file is ready, you can upload it below.

Select the region and self-billed group that your payment instruction file should be submitted for. All fields are required unless noted as optional.

REGION  
California

GROUP ID & NAME  
Select a Group

Drag and drop an Excel file (.xlsx) to upload

-or-

[Choose a file to upload](#)

- Click **Submit** once the file is successfully uploaded. A confirmation page will appear once the file has been submitted and sent for processing.
- You can check the status of your Payment Instruction File submission in **Transaction History**. If there was an issue processing your file, the status in Transaction History will update accordingly. Click **Done** to return to the Account Summary page

Back
Print

### Payment Instruction File Processing

*Information* Your file is processing  
Due to the size of your file, additional time is needed.

We need more time to process your file. To check the status, go to [Transaction History](#).

SUBMISSION DATE 04/16/2024	CONFIRMATION ID PYIF100010007269
REGION NCA	GROUP ID GROUP NAME

Done



## Feedback

The Feedback feature is designed to capture your thoughts on ways we can enhance your user experience on business.kp.org (formerly account.kp.org). This allows customers to share ideas for site improvements or new site features and even sign up for user research interviews.

1. To access the form, click **Feedback** on the header in the top right of the screen.

The screenshot shows the top navigation bar of the business.kp.org interface. The 'Feedback' link is highlighted with a red rectangular box. Other navigation links include Home, Manage Members, Manage Payments, Documents, and Plans & Forms. Below the navigation bar, there are sections for 'Manage Members' with a search bar, and a summary of 'REGION: CALIFORNIA', 'GROUP ID', and 'ACTIVE MEMBERS: 113'. On the right side, there are links for 'Enroll Subscriber/Family', 'Transaction History', 'Group Member List', and 'Mass Enrollment'.

2. Answer the questions on the Feedback form and click **Submit** to send your responses.

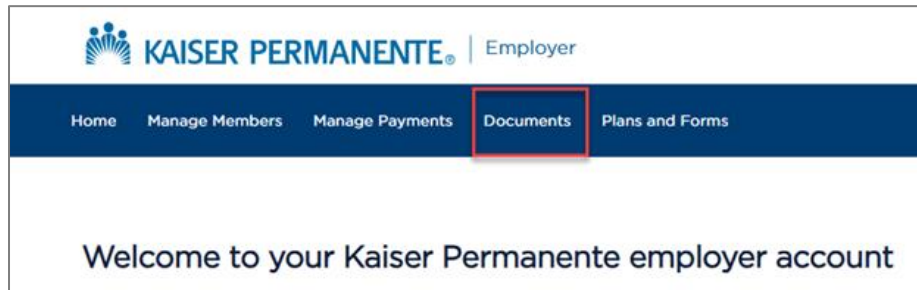
The screenshot shows the 'Feedback' form interface. The title 'Feedback' is prominently displayed at the top of the form area, followed by the instruction 'Share your ideas to improve account.kp.org in the form below.' Below this, a paragraph explains the purpose of the form: 'Use this form to make suggestions or to be added to the focus group interest list. If you have an issue and need assistance, please contact us.' The form includes a 'FEEDBACK CATEGORY' section with radio button options: 'Logging In and Site Access', 'Membership', 'Payments and Billing', 'Buying and Renewing Plans', 'Group Documents and Reports', 'Resource Materials', 'Broker Support', and 'Others'. There is a 'COMMENTS' section with a text input field labeled 'Enter comments ...' and a character count '500 of 500 characters left'. At the bottom, there is a question 'Are you willing to participate in a focus group? (Optional)' with 'Yes' and 'No' radio button options. The 'Submit' button is highlighted with a red rectangular box, and a 'Cancel' button is located next to it.



## Documents

The Documents area offers quick access to frequently requested coverage and financial documents, including group contracts and premium invoices. Note that the documents offered in this area of the site will vary based on your line of business and region.

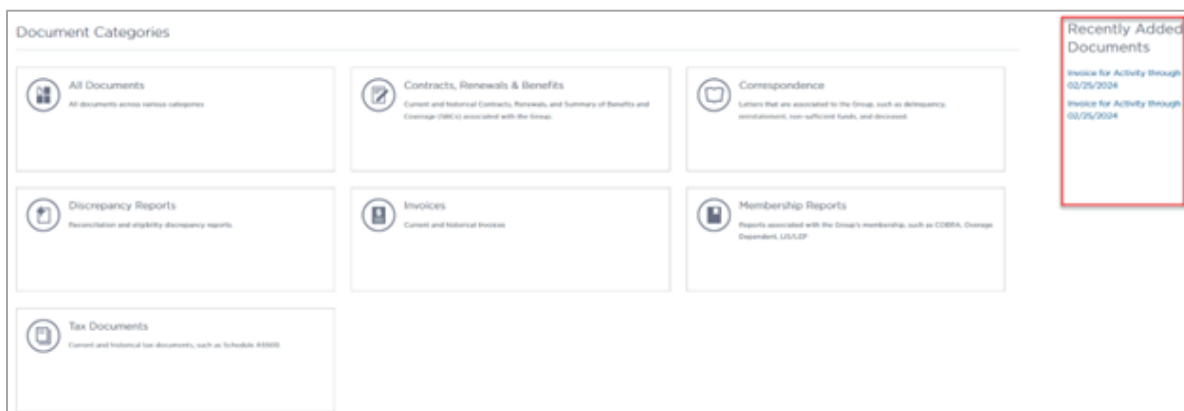
Watch the [Using the Documents Section](#) video.



### Group Documents

View the group documents, such as contracts, invoices, and discrepancy reports.

1. Click on Documents and enter the group ID for the desired group. If you only have access to documents for one group, you'll be taken directly to the Documents Dashboard for that group.
2. From the Documents dashboard, you can click into any of the Document Categories displayed. The categories shown will vary depending on your level of access to that group's information.
3. Refer to the Recently Added Documents section on the right-hand side for documents that have been added within the last 2 weeks.





4. Once you've chosen a Document category, you'll be taken to a page with all related documents for that category. You can view or download documents by checking the Actions column and choosing your desired option. Invoices, for example, can be found in the Invoices section.

Invoices			
For customers with consolidated invoices, the parent bill group for the invoice is provided. Invoices associated to plans with no membership are not generated.			
			Search Invoices
			Filter
DATE	NAME	BILL GROUP ID & NAME / CONSOLIDATED BILLING ID & NAME	ACTIONS
07/11/2025	Invoice for Activity through 08/11/2024		Download XLSX
07/11/2025	Invoice for Activity through 08/11/2024		Download PDF

#### NOTE:

- Invoices are offered in both PDF and XLSX file types. The PDF includes a payment coupon that needs to be included if you pay by check, although we highly recommend paying online via the Manage Payments feature. The XLSX file is a spreadsheet format that is helpful when reconciling membership against another list.
- Additionally, you can view or download a PDF of each document that is part of a contract package or a consolidated PDF of the complete package. All component documents are available as separate PDFs.

### Consolidated Invoices

A targeted population of customers that have members in multiple Kaiser Permanente regions receive a monthly consolidated invoice.

Here are a few things to know:

- To access the consolidated invoice, click **Documents**. Select the lead Kaiser Permanente region associated to your account and click **Continue**.
  - The lead region for a consolidation is provided by your Membership Administration Consultant (MAC) or your Account Manager. The invoice does not identify your lead region. If you have any questions about finding your lead region online, please reach out to your MAC or Account Manager.





- Consolidated accounts can make payments online via Manage Payments, but the payment must be made through the lead region. Please do not make online payments on a non-lead region.
- If you prefer not paying online, please continue to use your established payment method: ACH (Automated Clearing House), Wire Transfer, or USPS (U.S. mail)/Courier Delivery. Please refer to the last page of your invoice for additional payment details.
- Customers will need to ensure they have access to the Group ID and Bill Group ID of the lead region to view their consolidated invoice.
- To learn how to view your consolidated bill, refer to [Viewing and Downloading Invoices](#).

For any further questions, please contact your Membership Administration team.



## Frequently Asked Questions

Questions	Answers
Do I need an access code?	An access code is needed for those who self-register (self-registration only provides sign on, but not the ability to access any secure features).
I registered but don't have access to my account.	<p>An Online Account Services request is required, in addition to the self-registration, to link your secure account to your groups. Click the link below to complete either the electronic or PDF version of the request form.</p> <p>To manage employees' Kaiser Permanente health plan membership online, please have your Primary Group Administrator <a href="#">fill out this online account services application form</a> online. For additional information and options click 'Need help'.</p>
I registered and created my own user ID, do I still need an access code?	Yes, once the application has been processed, an email notification will be sent with an access code provided.
How do I set up automatic recurring payments for my bill?	<p>Review detailed instructions with screenshots <a href="#">here</a>.</p> <p>Monthly automatic payments (autopay) can be set up by selecting the <b>Make or Schedule a Payment</b> button on your Account Summary page.</p> <p>Select the option for recurring payment and any Bill Groups you would like to include in the monthly autopay.</p> <p>Complete each step as instructed then click <b>Submit</b>. Your payment will automatically process every month on the day you selected.</p>



Questions	Answers
How do I request a refund?	For refund requests, please contact Membership Administration: <u>California</u> : Small Business Accounts 800-731-4661, option 2 Large Business Accounts 800-731-4661, option 4 <u>For regions outside California</u> : 866-868-7220, option 8
Do I need an access code every time I log on to the website?	No, the access code is a one-time use, during registration. Once the access code has been entered the first time, it is no longer needed.
How long do I have before my user access code expires?	Access codes are valid for 7 calendar days.
How can I contact you if I still have questions?	Go to <a href="#">Contact Us</a> and select your region to identify the best contact for your needs.



## Broker Supplement

We value your partnership with Kaiser Permanente. To ensure you have the information you need to manage your Book of Business and work with KP, we've dedicated this section to answering your questions and helping you find support when you need it. Visit our [Broker Manage Accounts](#) page for additional information on how to manage your book of business online. You can find additional information and resources on our [Broker homepage](#). Remember to select your group region from the menu as the resources and guidance may vary.

NOTE: KP Washington Brokers will keep access to their current portal.

### How to manage secure account access

Managing your Book of Business on business.kp.org (formerly account.kp.org) no longer requires delegation from your group's Primary Group Administrator (PGA). For more information, please visit **Managing account access** in our [Client Support](#) section.

### Delegation

A Broker of Record (BOR) can now delegate access to their Book of Business to associates within their firm. Permissions can be set for firm associates to view group information and even perform updates to group membership.

On the **Account delegation** page, Brokers can share access to their Book of Business with associates by clicking **Add a new delegate** and completing a short form.

**Account delegation**

**My account delegates** | Delegated to me

Delegates (12)

**Add a new delegate**

Delegate name	Email address	Permissions	Status	details
David Lee	lee.david@kp.org	Book of business, New sales	Active delegate	<a href="#">Details</a>   <a href="#">Remove</a>
David Lee	lee.david@kp.org	Book of business, New sales, Commission statements	Active delegate	<a href="#">Details</a>   <a href="#">Remove</a>



The delegate will receive an email with instructions to sign in. Delegates will receive a code each time they are given access to a new Book of Business. These delegates can view the book of business they have been granted access to by selecting **Accounts delegated to me** in the account utility menu.

Once they have access, they can click **View [Broker Name]'s account** to see their Book of Business.

The screenshot shows the 'Accounts delegated to me' page. At the top, there is a navigation bar with links: Dashboard, Book of Business, Plans and Resources, and Working with KP. Below the navigation bar, the page title 'Accounts delegated to me' is displayed. Underneath, there is a section labeled 'Accounts (1)' with a button 'Enter account access code'. A table lists the delegated accounts:

Name	Region	Access Rights
David Ross	COL	Book of business

Below the table, there is a button labeled 'View David Ross's account' which is highlighted with a red box.

## Individuals and Families Book of Business

Brokers supporting Individual and Family clients can view their Book of Business by signing on to business.kp.org (formerly account.kp.org) and clicking **View All Book of Business on Your Dashboard**.

The screenshot shows the Kaiser Permanente Broker Dashboard. At the top, there is a header with the Kaiser Permanente logo and the word 'Broker'. To the right, there is a 'Region' dropdown menu set to 'California' and a user profile icon. Below the header, there is a navigation bar with links: Home, Book of Business, Plans and Resources, and Working with KP. The main content area is titled 'Your Dashboard'. On the right side of the dashboard, there is a button 'View Recent Transaction'. Below this, there are two sections: 'Book Of Business' and 'Business Quotes'. In the 'Book Of Business' section, there is a search bar labeled 'Search For A Client' with the placeholder text 'Enter Client Name' and a 'Search' button. Below the search bar, there is a button labeled 'View all Book Of Business' which is highlighted with a red box. In the 'Business Quotes' section, there are two buttons: 'Get Small Business Quote' and 'Enroll Small Business'.



The Principal Agent will be prompted to complete a Business Associate Agreement (BAA) at their initial log in. Once the Principal Agent submits the BAA, other firm agents can view members and applicants under the **Individuals and Families** tab of their Book of Business. Non-principal agents will receive a message requesting the Principal Agent complete the BAA if it has not been submitted.

The Individuals and Families tab information displays a list of Members or Applicants based on the selection made at the top of the page. Members are displayed from the last 12 months, while Applicants are listed for the last 6 months.

**Applicants** and **Members** lists will display both On-Exchange and Off-Exchange information for most markets nationwide. In California, the Applicant list will display Off-Exchange only. Additional client information is available under the **Action** dropdowns:

- **Coverage Summary** - additional coverage details (including MRN) and demographic information
- **Coverage History** – previous KPIF coverage information (excluding CA)
- **Premium Billing** - premium billing information including BUID and if autopay is set up

### Book of Business

+ Broker Information

Individuals and Families   Small Business   Large Business

## Individuals and Families

Whose information would you like to view? Select an option below.

☒ Members   ☐ Applicants

Search for a member

[Filter](#)
[Download list](#)

**Members (107)**

You're viewing all 107 members in this book of business.

**Note:** This information is current as of 02/11/2025 and may not reflect all client activity. Contact our support team at 1-844-394-3978 or KPIF@kp.org with any questions and refer to your Bonus and Reward statement to see all eligible members for whom you were paid a reward or bonus.

Name	Date of birth	Plan name	Coverage dates	Status	Exchange type	Actions
Shuyuan Pignard Subscriber	06/04/1973	Kaiser Permanente - Silver 70 HMO Off Exchange	05/01/2024-	Covered	Off	Select an action
Plok Ujik Subscriber	01/01/1977	Kaiser Permanente - Minimum Coverage HMO	12/01/2024-	Covered	Off	Select an action



**NOTE:** Colorado, Georgia, Hawaii, Mid Atlantic, Northwest regions display Agent ID and Firm ID.

- Click the plus '+' next to a Subscriber's name to view their dependent's information.
- **Search** and **Filter** features are available to the right, above each list, to help locate specific members or applicants quickly.
- Click **Download list** to obtain a csv file of Members and Applicants lists.
- Click dropdown menus under **Actions** to access options such as **Coverage Summary**, **Coverage History**, and **Premium Billing Summary**.

## Plan Information

Choose a Category

**Coverage Summary**

Coverage History

Premium Billing Summary

### Coverage Summary

**Important:** This information comes from the details the member provided through the health benefit exchange where their coverage was purchased. Changes can only be made by the member through the health benefit exchange.

Member information			
<b>Name</b> WYRFSF TDMEKIOFUF	<b>Relationship</b> Subscriber	<b>Medical Record Number</b> 500023055	<b>Date of Birth</b> 02/05/1983
<b>Primary Phone Number</b> (307) 742-8139	<b>Email Address</b> csouywdcdf7@noznl.cax	<b>Home Address</b> 38423 Lane Street LITTLETON, CO, 80127	<b>Mailing Address</b>

Current Coverage   Future Coverage

#### Current Coverage (1)

**KP Select CO Silver 50/5/94% CSR**

Plan ID: 041003006

Product type: Medical

Health plan: Kaiser Foundation Health Plan, Inc

**Subscriber:** WYRFSF TDMEKIOFUF

Coverage status: Covered

Coverage start date: 02/01/2025

Coverage end date: 12/31/2025

Exchange ID: 284047845

[+ Show more coverage information](#)



## Plan Information

Choose a Category

Coverage Summary

**Coverage History**

Premium Billing Summary

### Coverage History (1)

#### Member Information

Name	Relationship
Wiseman Tdmstacey	Subscriber

#### KP MD Platinum 0/15/Vision

Plan ID: 061001001  
 Product type: Medical  
 Health plan: Kaiser Foundation Health Plan, Inc.

**Subscriber:** Wiseman Tdmstacey

Date of birth: 08/12/1992  
 Medical record number: 100032881  
 Coverage status: Terminated  
 Coverage start date: 05/01/2024  
 Coverage end date: 11/30/2024  
 Exchange ID: 6279663789

**Family member:** McGee Tdmstacey

Date of birth: 04/18/1975  
 Medical record number: 100032882  
 Relationship: Spouse  
 Coverage status: Terminated  
 Coverage start date: 05/01/2024  
 Coverage end date: 11/30/2024  
 Exchange ID: 362879763

## Plan Information

Choose a Category

Coverage Summary

Coverage History

**Premium Billing Summary**

### Premium Billing Summary

#### Member Information

Name	Relationship
A Lacesa Lazaret	Subscriber

#### Plan Billing Details

Billing unit ID: 282515000000262536D02  
 Payment due on 08/31/2024

**This account doesn't have an automatic payment scheduled.**

[+ Show recent activity](#)

**Current amount due**

**\$12,259.30**

#### Monthly Premium

1000004-HMO-MEDICAL-DHMO

The monthly premium is the amount the subscriber pays each month for coverage.

**Monthly premium**

**\$544.95**





## Broker Support Resources

We have recently updated our online broker resources to make it easy to find the information and tools you need.

- ✓ To find helpful administrative tips, guidance for new brokers, and compensation information, check out the [Working with KP](#) section.
- ✓ The [Client Support](#) section has information to help you provide great customer service with materials, information, and online account tools for managing their membership updates in [Manage Accounts](#).

**NOTE:** Remember to select your group region from the menu as the resources and guidance may vary. Both [Working with KP](#) and [Client Support](#) areas are accessible from the **Quick start** options on the [Broker Home](#) page or from the **Broker** menu at the top of the page.

## Broker Frequently Asked Questions

Our [Broker FAQ](#) page answers common questions about doing business with Kaiser Permanente and supporting your clients on business.kp.org. Please remember to select the group region from the menu as the questions and answers may vary.

## Still have questions and need help?

Unable to find exactly what you are looking for and want to speak to someone for advanced support? Go to our [Contact Us](#) page and select your group region to see the broker contact options available for your line of business and type of inquiry.



## Online Experience Outside California

**Do your screens look *different*?** To provide you with the best online experience, we are updating the look of business.kp.org (formerly account.kp.org). We have started rolling customers onto the new experience gradually and will continue to expand to all groups. The new user experience will simplify the look and make the process of administrating your groups easier.

If you are in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington) and have yet to be updated to the new experience, please use instructions below as these screens reflect your current experience.

### Viewing Online Payment History

The Payment History page displays payments made online that have processed to your account. Click **Payment History** on the Account Summary page.

Manage Payments > Account Summary

REGION COLORADO GROUP ID

View Invoices | Payer Profile  
 Manage Payment Methods | View Scheduled Payments  
 Financial Activity | **Payment History**  
 Transaction History

Enter the Billing Unit ID / Bill Group ID – Click **Search**. Search results will display.

**Search**

Region\* Colorado

Payment Method (Last 4 Digits)

**Bill Group ID\***

\*Required fields

From Date To

Amount Range \$0 To \$0

POS Transaction ID

**Search**

Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status	Action
+	03/25/2020	35470	35470	\$1.00	Payment	ACH	Pending	<a href="#">Void</a>
+	03/20/2020	34521	34521	\$1.00	Refund	ACH	In Process	
+	03/20/2020	35466	35466	\$1.00	Payment	ACH	Voided	
+	03/20/2020	35465	35465	\$1,837.59	Payment	ACH	Declined	
+	03/20/2020	35452	35452	\$0.99	Refund	ACH	In Process	
+	03/20/2020	35452	35452	\$0.01	Refund	ACH	Processed	



### Status Legend:

- **Pending** – Payment is authorized and waiting for bank settlement
- **Voided** – Payment is cancelled before bank settlement
- **Declined** – Payment or Refund is declined during authorization
- **Processed Not Completed** – Bank settlement not completed
- **Processed** – Bank settlement is complete
- **Refund Requested** – Refund has been requested for the transaction
  
- **In Process** – (refund requests only) Refund submitted for processing is in progress
- **Refund Approved** – Refund requested is approved
- **Refund Denied** – Refund requested is denied

To view payment details, click the expansion icon (+) within the Details Section.

Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status
	03/25/2020	35470	35470	\$1.00	Payment	ACH	Pending
	03/20/2020	34521	34521	\$1.00	Refund	ACH	In Process
	03/20/2020	35466	35466	\$1.00	Payment	ACH	Voided
	03/20/2020	35465	35465	\$1,837.59	Payment	ACH	Declined
	03/20/2020	35452	35452	\$0.99	Refund	ACH	In Process
	03/20/2020	35452	35452	\$0.01	Refund	ACH	Processed

### Voiding a Payment

Online payments may be voided same day only if **Void** is indicated in the Action or Status column.

1. On the Online Payment History page, locate the payment and click **Void** in the Action column

Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status	Action
	09/07/2017	0	0	1.00	Payment	ACH	Declined	
	09/07/2017	246235	246235	1.00	Payment	ACH	Authorized	<b>Void</b>
	09/06/2017	246161	246161	1.00	Payment	ACH	Authorized	Void
	09/06/2017	246160	246160	1.00	Payment	ACH	Authorized	Void
	09/06/2017	246159	246159	1.00	Payment	ACH	Authorized	Void
	09/06/2017	264	264	0.50	Payment	ACH	Authorized	Void

- Click **Yes** on the Void Confirmation window.



**Void Confirmation**

Would you like to proceed with this Void?

No
Yes

- A confirmation window will appear, click **Close**.

KAISER PERMANENTE

**Void Confirmation - Approved**

Void Date:	09/07/2017	Payment Method:	ACH *****7890
POS Trans ID:	246235		
Amount:	\$1.00		

Close

## Viewing Financial Activity

Financial Activity (formerly named Full Payment History) allows users to view all payments made (e.g., check, ACH, etc.), refunds, and reversals.

- To view all payments made other than online payments (e.g., check, ACH, etc.), refunds, and reversals, click **Financial Activity** on the **Account Summary** page.

Manage Payments >
> Account Summary

REGION  
**COLORADO**

GROUP ID

[View Invoices](#)  
[Manage Payment Methods](#)  
Financial Activity  
[Transaction History](#)

[Payer Profile](#)  
[View Scheduled Payments](#)  
[Payment History](#)

- Select a Billing Unit to view from the drop down. Please note if you only have one billing unit/billgroup it will automatically be selected.



Choose a Billing Unit

### Payment History

This page displays transactions that have been applied to the selected billing unit.

Billing unit

Choose an option to filter by:

☒ All
 ☐ Billing start date
 ☐ Coverage start date
 ☐ Payment due date
 ☐ Transaction type

Additional filter options:

Sort filtered data by:

☐ Billing start date
 ☐ Coverage start date
 ☐ Payment due date
 ☒ Transaction date

Select number of days(defaults to Past 6 months)

☐ 60 Days
 ☐ 90 Days
 ☐ 120 Days
 ☒ Past 6 Months

Transaction Date	Billing start date	Coverage start date	Payment due date	Transaction type	Transaction amount
------------------	--------------------	---------------------	------------------	------------------	--------------------

3. To choose an option to filter by, select **All**, **Billing start date**, **Coverage start date**, **Payment due date**, or **Transaction type**.
  - a. Additional filter options allow you to select preferred option based on the filter option selected.
  - b. Select the number of days/months of history to view. The default is 6 months.
4. Click **Search** to view payment transactions.

We look forward to sharing more great updates to business.kp.org with you soon!