Business.kp.org User Guide

KAISER PERMANENTE®

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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**. 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).

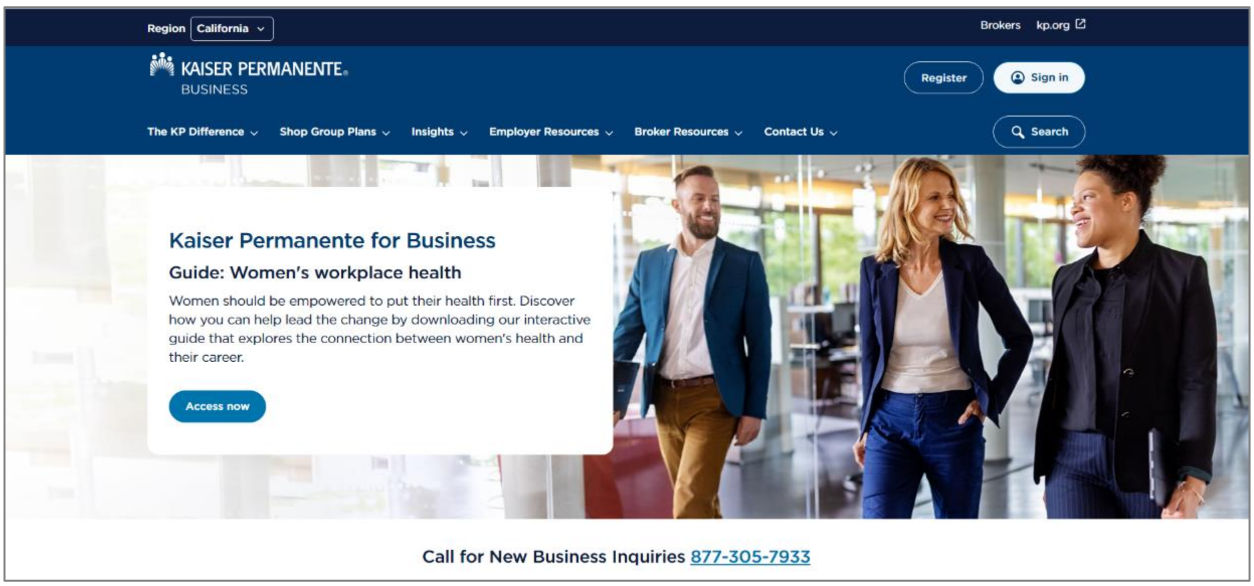
Business.kp.org (account.kp.org) Access

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.

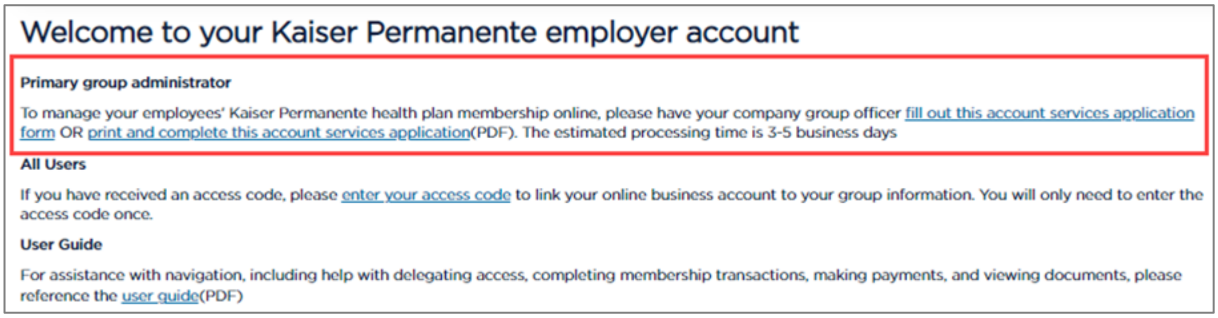
Registering for an Account

1. Go to business.kp.org.
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.



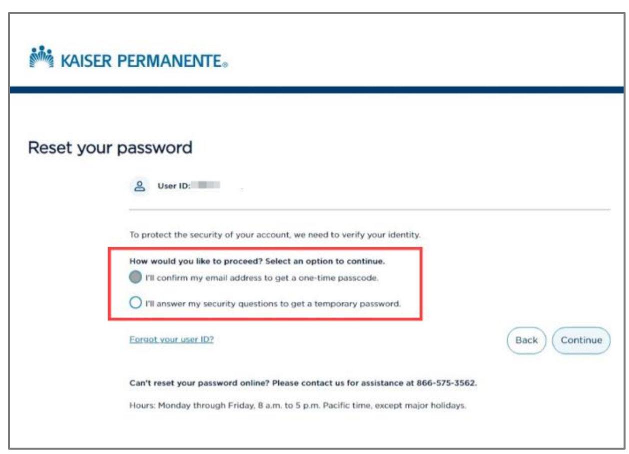
5. A confirmation number will be provided upon submission of the web form. The estimated processing time is 3 to 5 business days.
6. Once the request has been processed, an email notification will be sent to the user with additional sign-on instructions.

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.



Managing Account Access

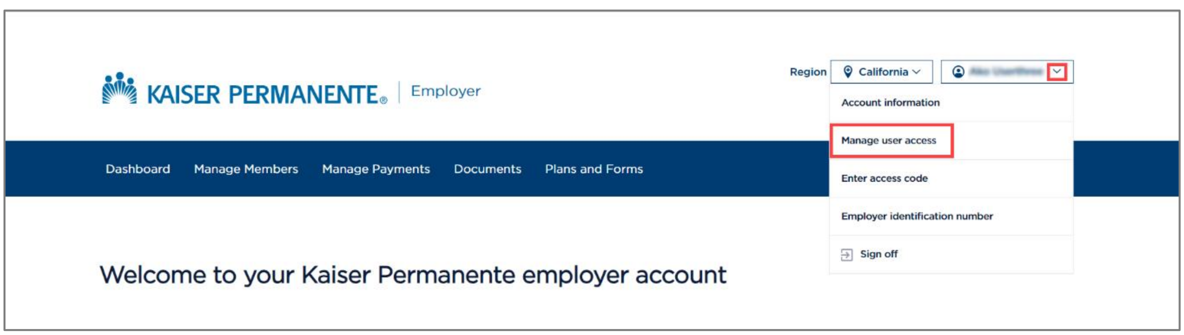
The Primary Group Administrator (PGA) is in charge of monitoring, delegating, and updating user access to group information. We recommend auditing your user list at least every six months to ensure that roles stay current.

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.

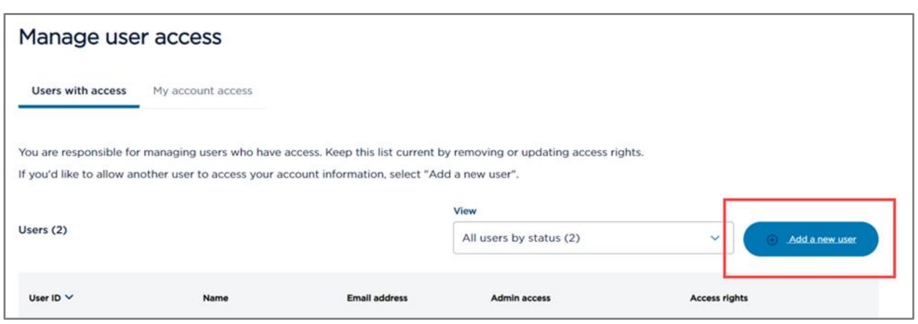
Multi-State: For customers that have members in multiple Kaiser Permanente regions and receive a monthly consolidated invoice, you will need access to all groups and bill groups within the consolidation to see their information in **Manage Payments**. To view group information or pay bills, request user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

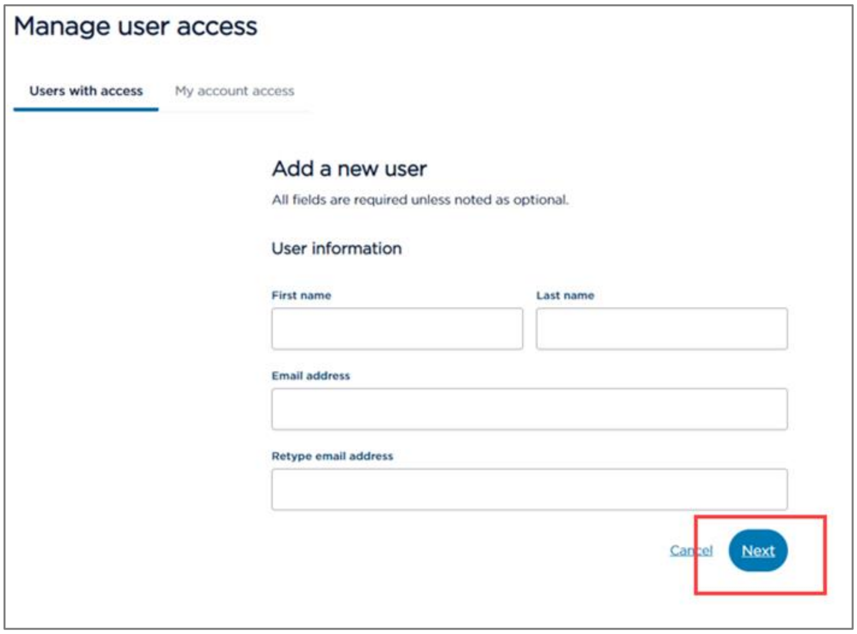
1. The Primary Group Administrator signs in on business.kp.org.
2. Click on the account utility menu in the top right.
3. Select **Manage user access**.



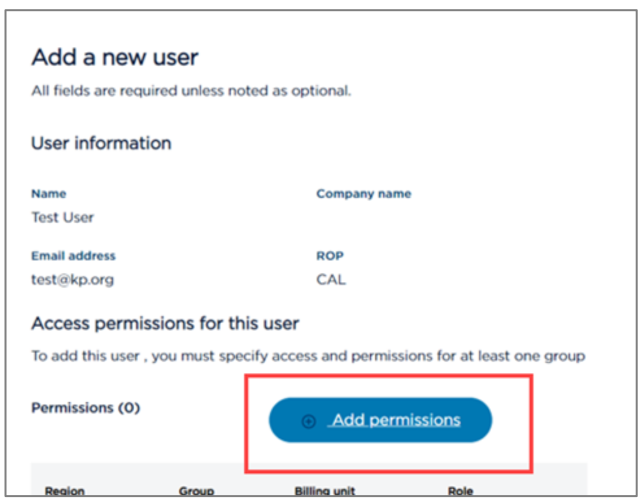
4. Click **Add a new user**.



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

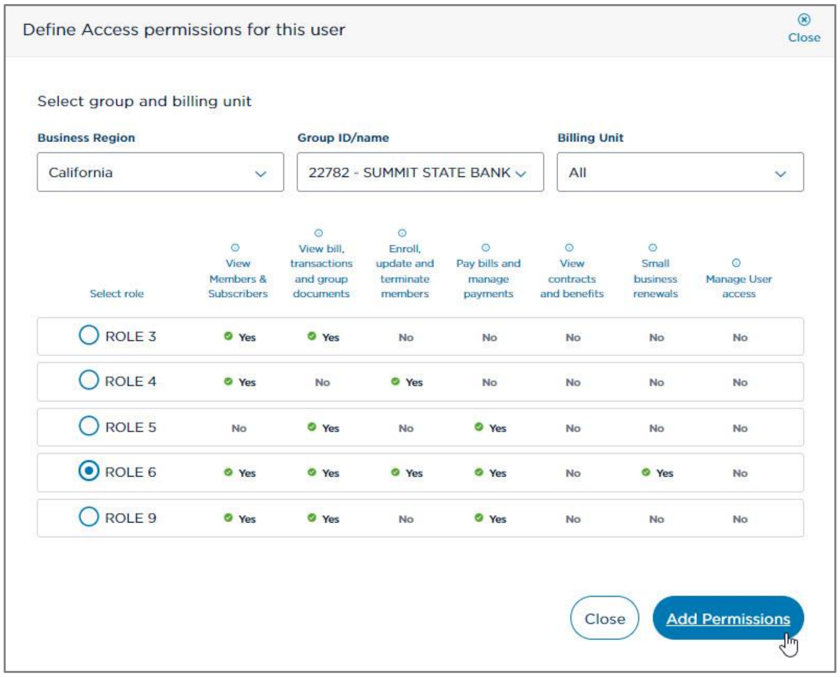


6. Click **Add permissions**

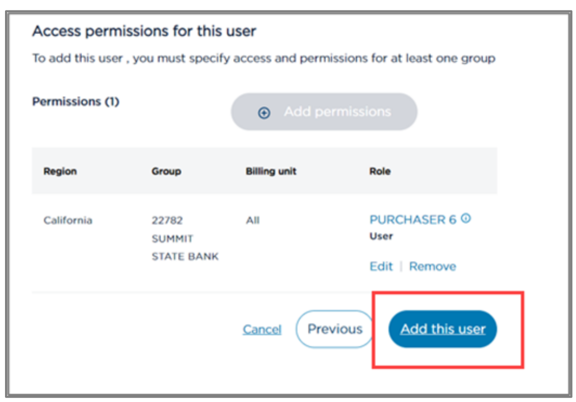


7. In the **Define access permissions for this user** pop-up screen, you may select the appropriate billing unit or leave the default '**All** ' selected to give access to all billing units. Then select the level of access to be given.

8. Click **Add permissions**.



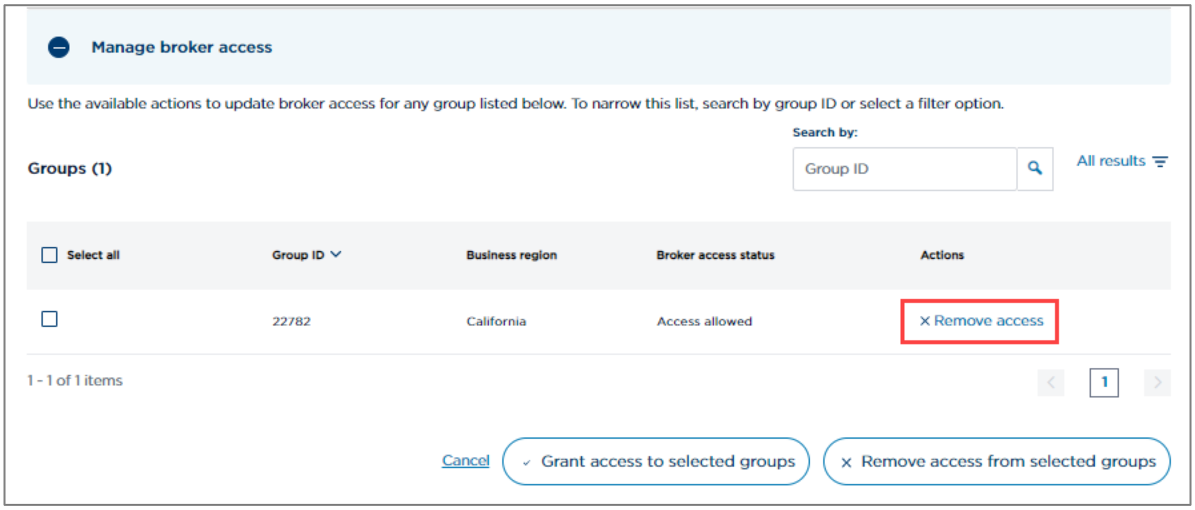
9. Click **Add this user.**



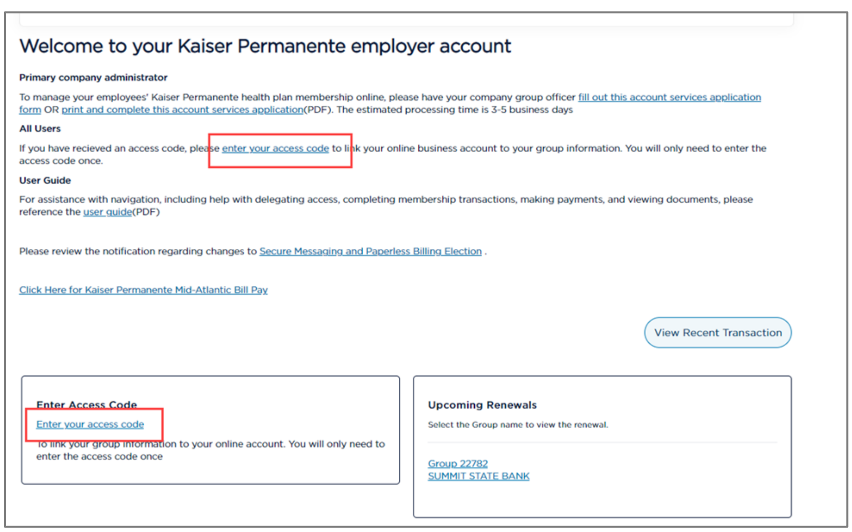
Once the Primary Group Administrator has added the additional user, the new user will receive an automated email with an access code included. The new user will need to create a username and password, log in, and enter the access code on the **Dashboard** screen (the access code link also appears in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

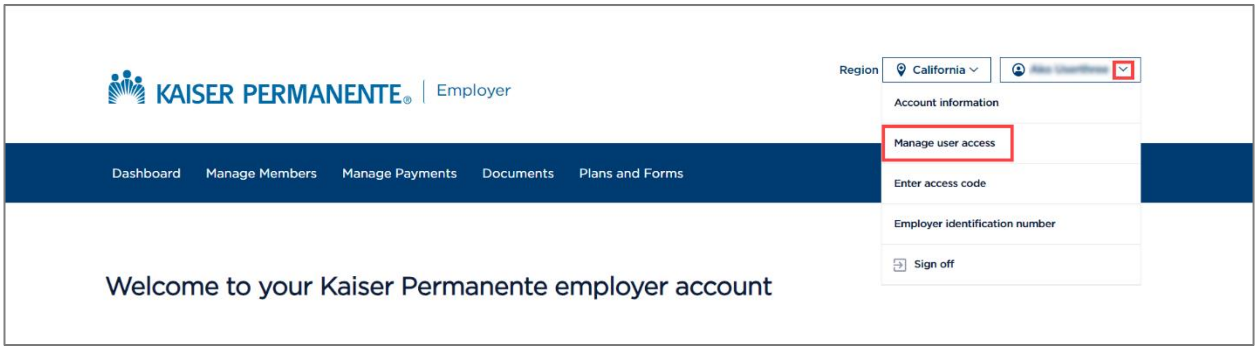


IMPORTANT: We recommend giving new users a heads up to watch for the access code email, and to be sure that they log into the **employer** side of the site to complete the process.

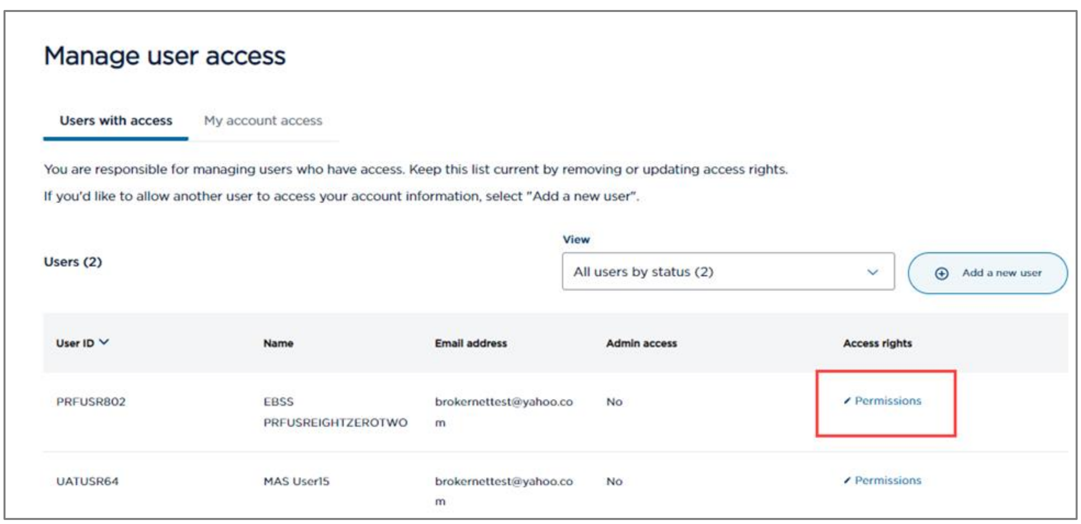


Modifying a Secondary User's Access

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

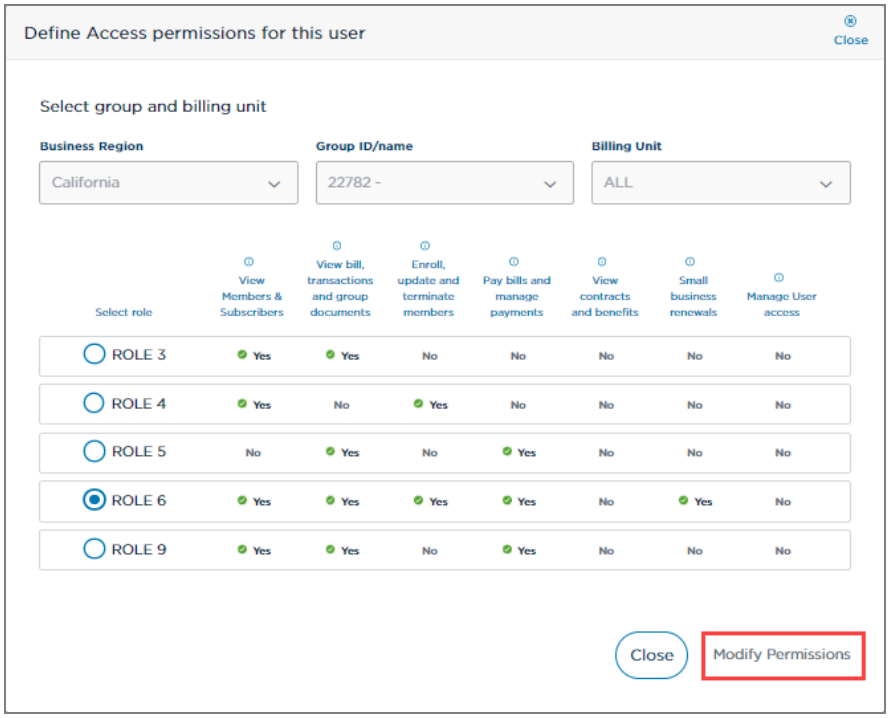


2. The Primary Group Administrator will see a list of active users under the **Users with access** section. Please note that users will not appear on the list until they have activated their access code.
3. Click **Permissions** in the **Access rights** column to display the user's access. The user's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



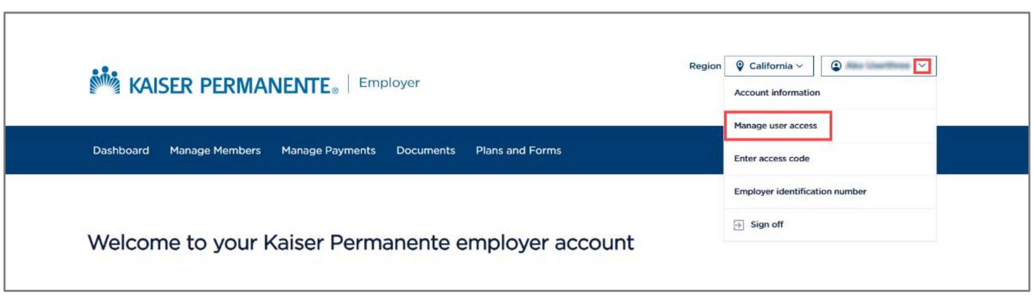
4. Click **Permissions** in the **Access rights** column to display the user's access. The user's current access level will display on the screen.
5. Click **Edit** to update the user's access level.

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

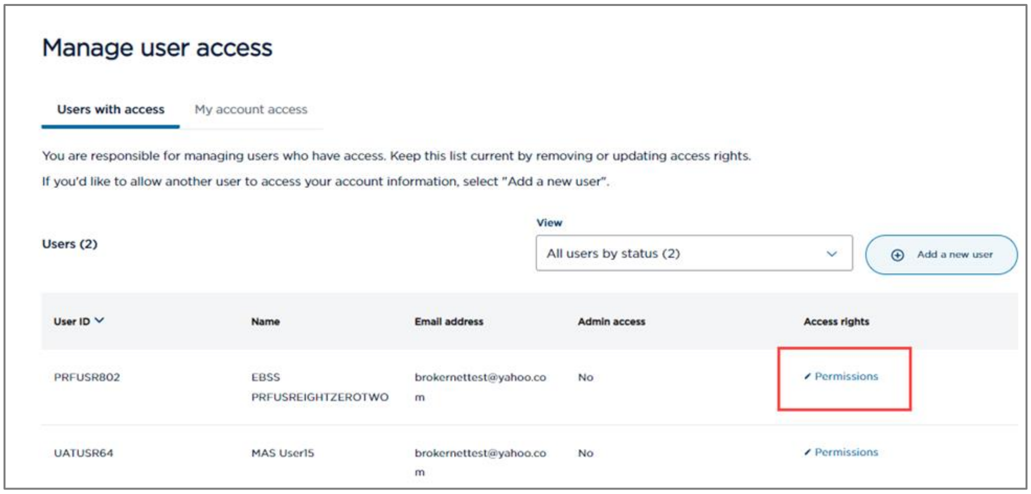


Removing a Secondary User's Access

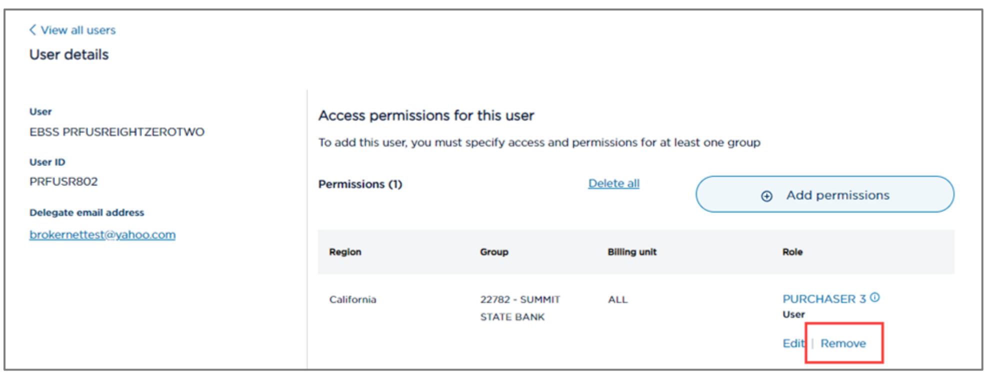
1. Select **Manage user access** from the account utility menu in the top right



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



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.

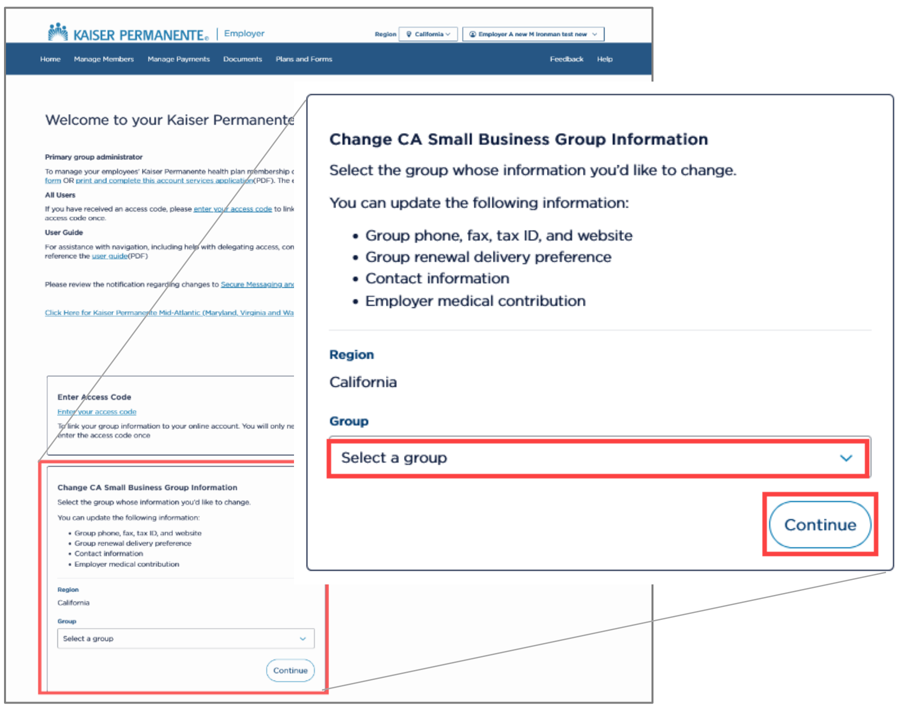


Changing Group Information

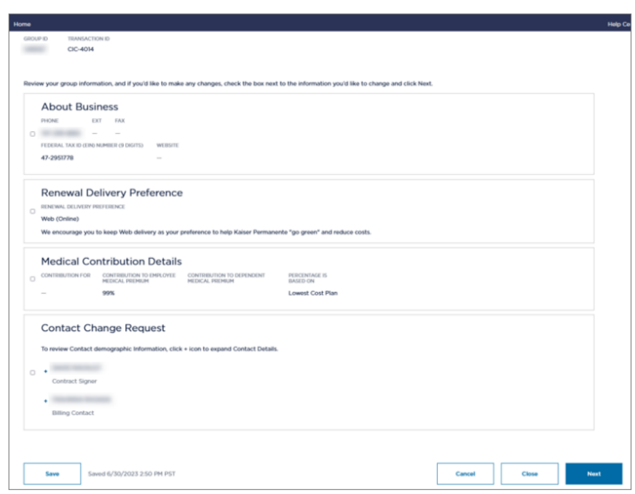
Small Groups in California can update group phone number, fax, tax ID, website url, renewal delivery preference, contact information, and employer medical contribution in real time. This capability will also remain accessible from the group's renewal page.

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.**

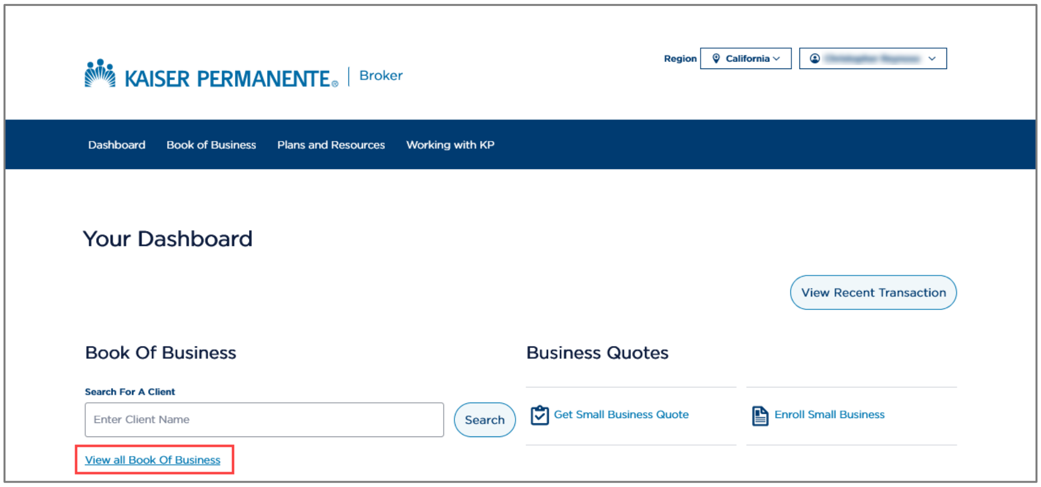


2. You will be navigated to the group information screen where you can select the type of information you want to change and follow the prompts to update and save the new information.

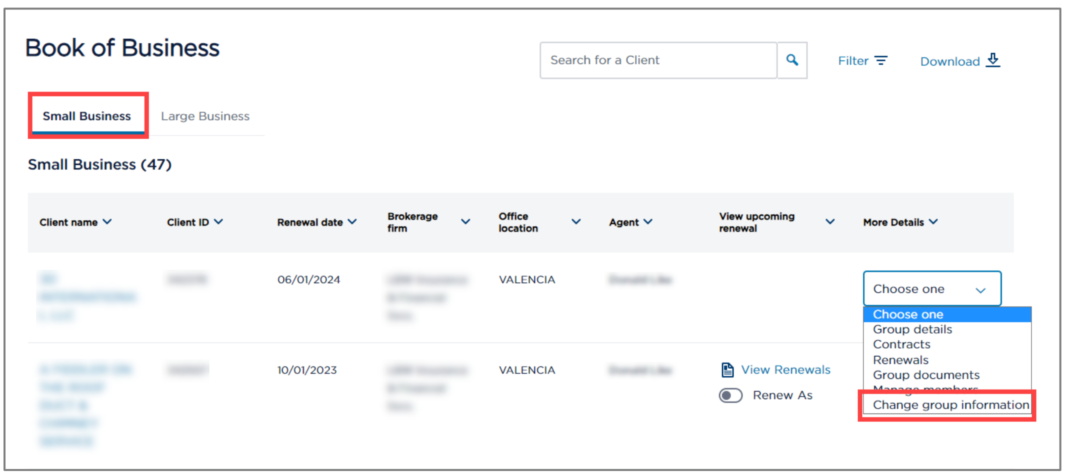


Broker Book of Business group information change (CA Small Business only)

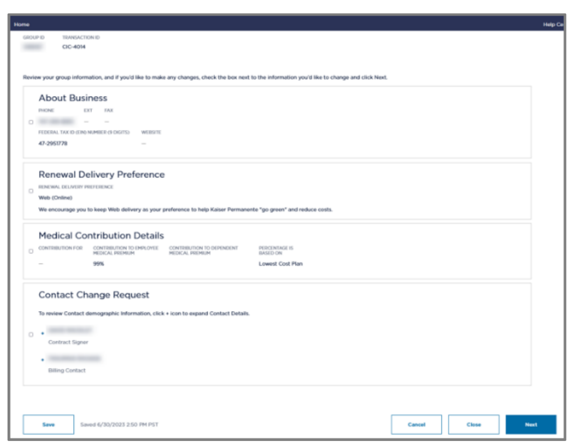
1. From the Broker Dashboard click **View all Book Of Business**.



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



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.

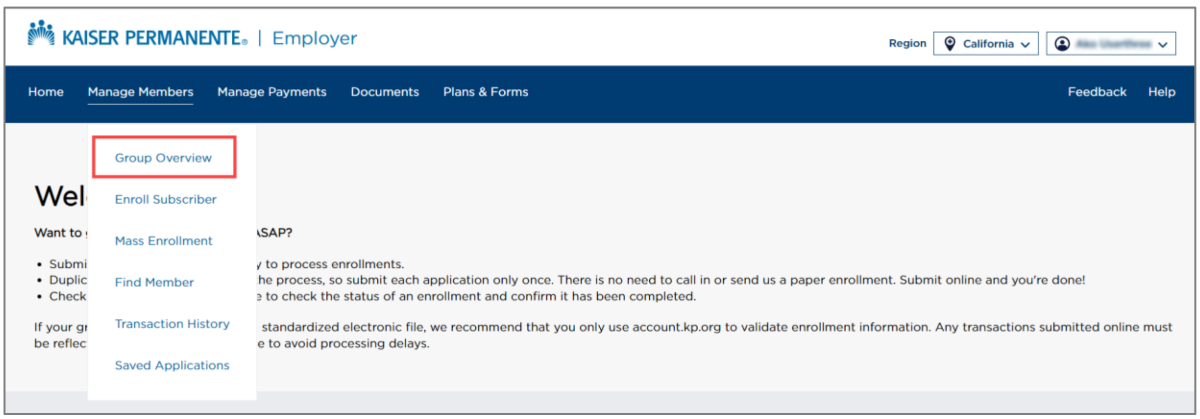


Manage Members

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**.

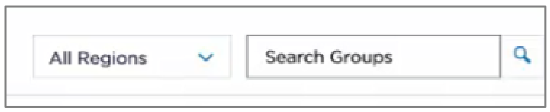
NOTE: Users can click on the buttons next to the Search Groups field to toggle from list (shown below on left) to card view (shown below on the right).

Finding a Specific Group

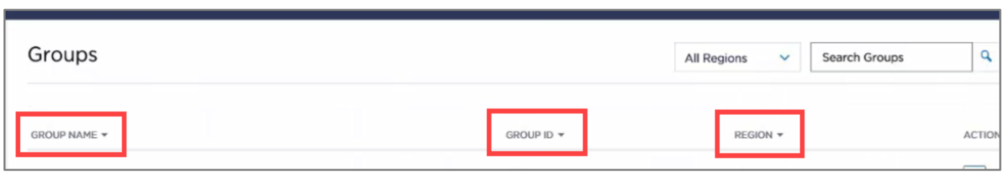
Watch the [Finding a Group / Subgroup](#) video.

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.

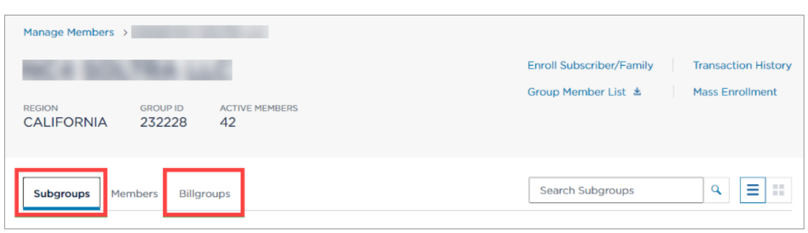
Download a member list at the group, subgroup or billgroup level. The list will be in spreadsheet format for easy sorting, and will contain the following information:

- 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)

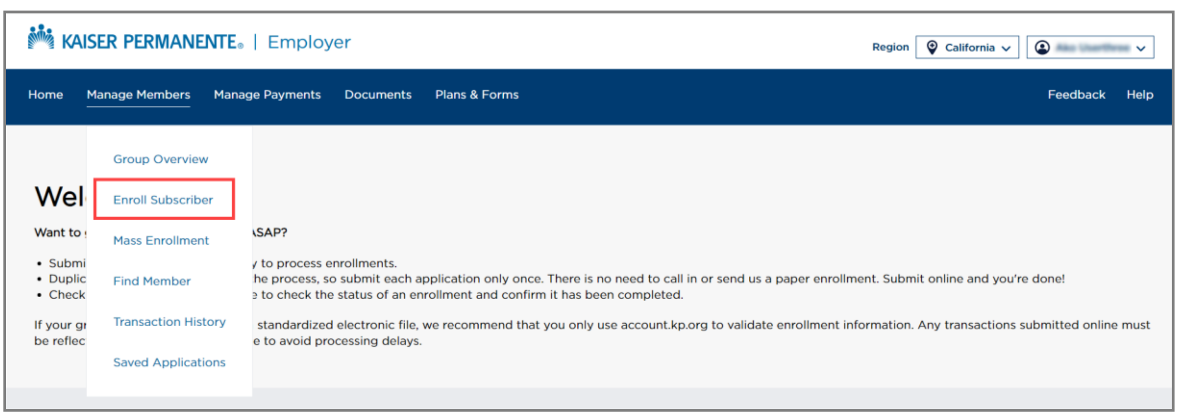
How to add a subscriber and their family members to your group coverage.

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.

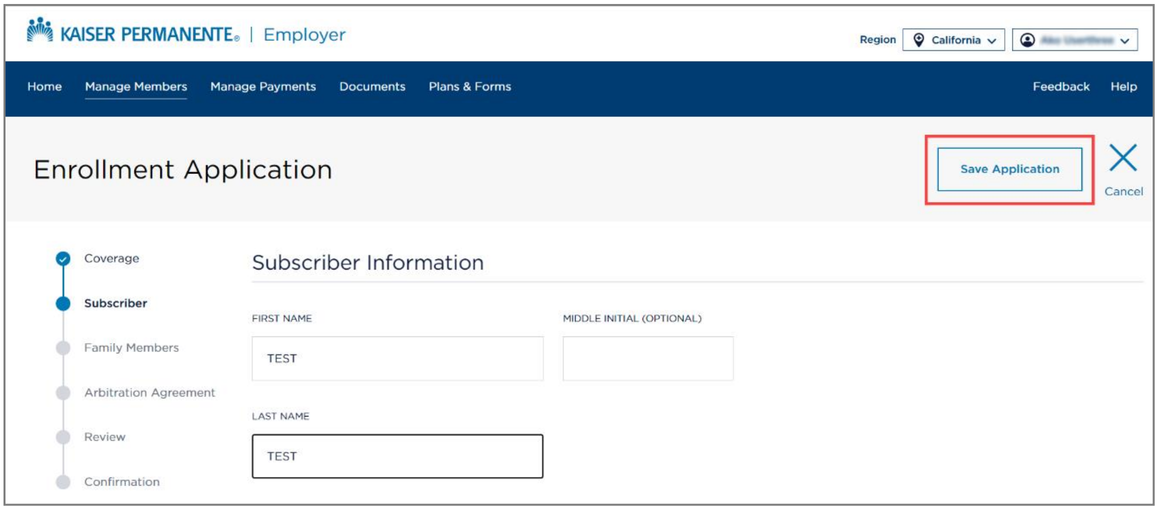
Complete the following information for the subscriber/family:

- 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.

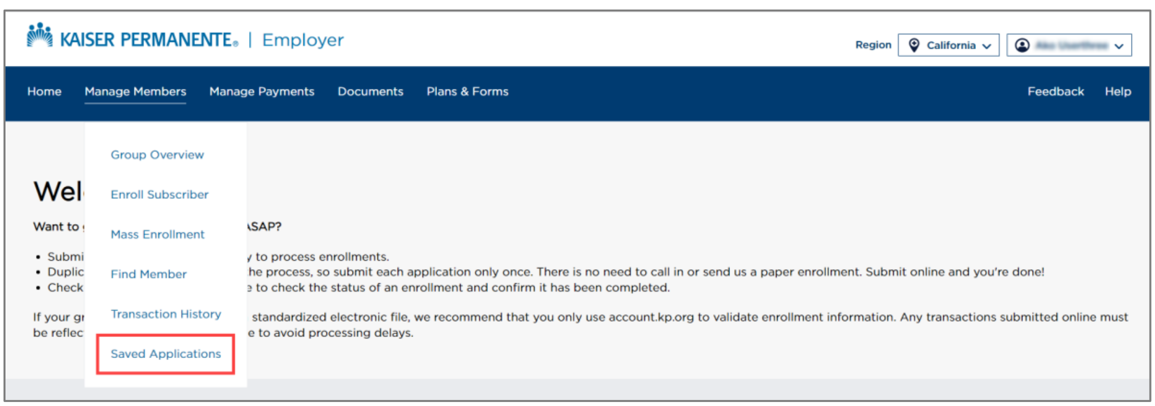
Saving an Enrollment Application

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.



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.

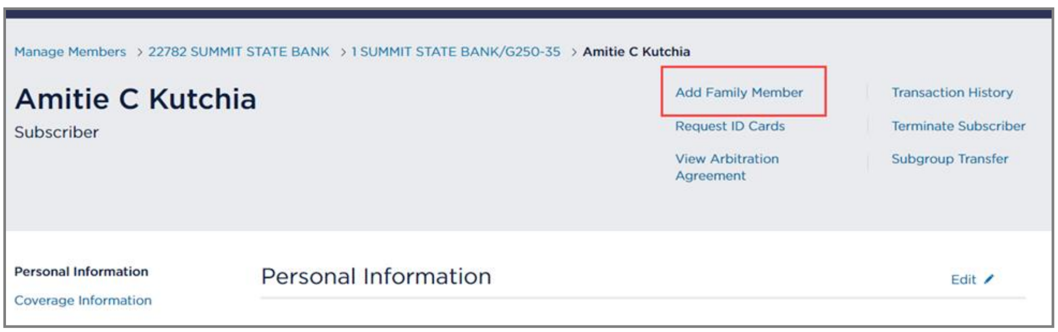


Adding Family Member to an Existing Subscriber Account

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**.

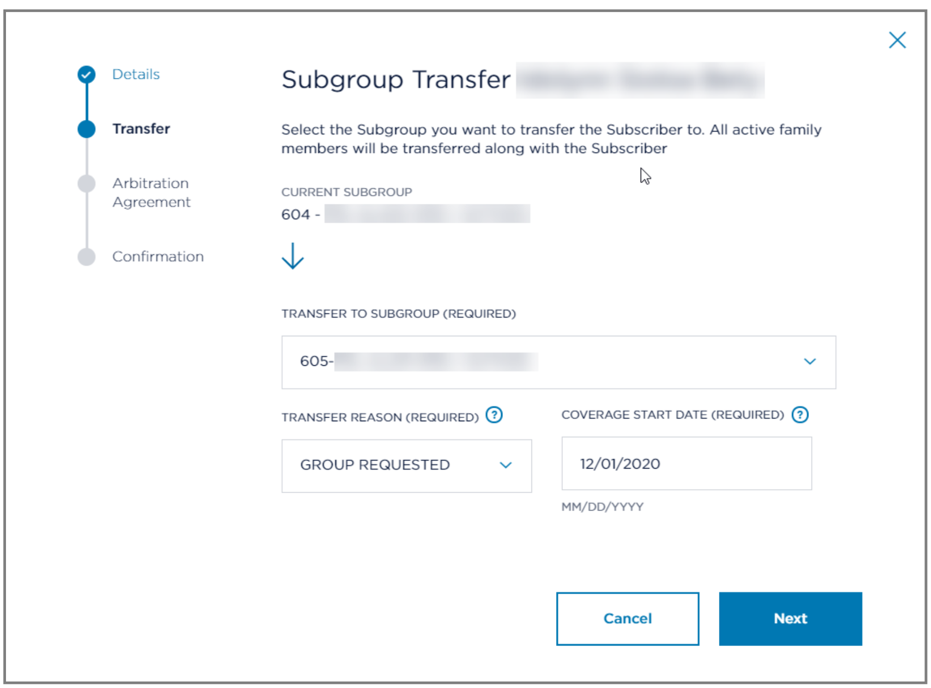
Transferring members to another subgroup

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."



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.

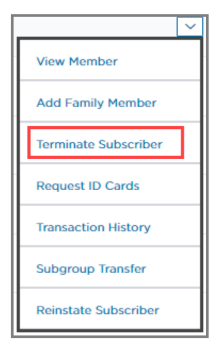
To stop coverage for a member:

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

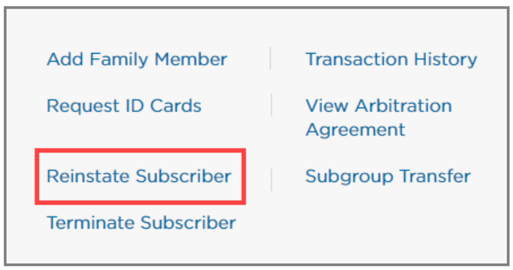
Reactivate a subscriber or family member who had lost coverage, without having to complete the data entry associated with the full re-enrollment process.

Watch the [Reinstating Members with Terminated Coverage] video.

To reinstate a terminated member:

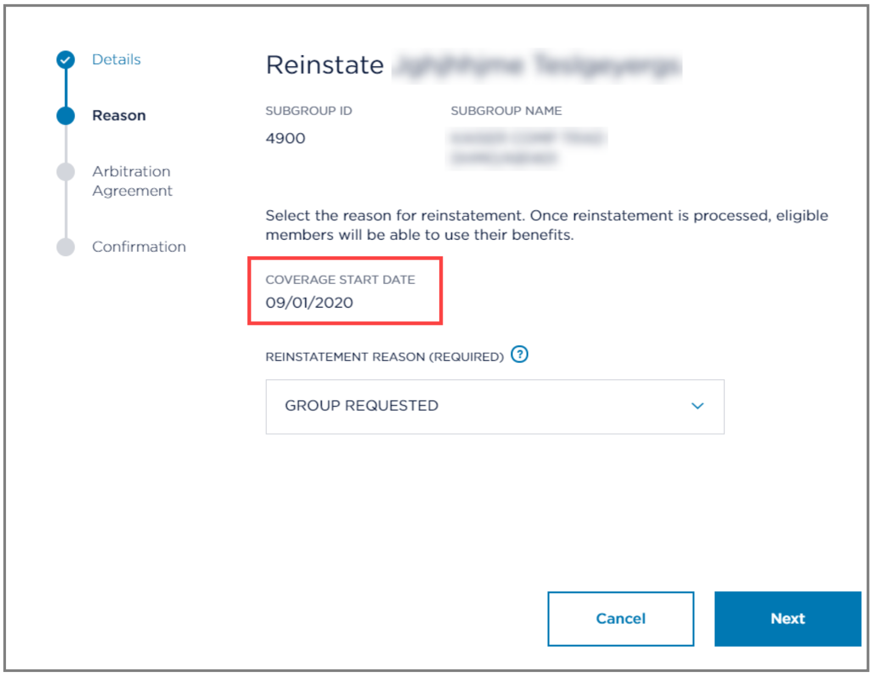
1. Find the member you want to reinstate using the [Find Member] option in the Manage Members dropdown menu, or select them from the Member tab on the Group page.
2. Once you find the member, select Reinstate a member by doing one of the following:

   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

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.

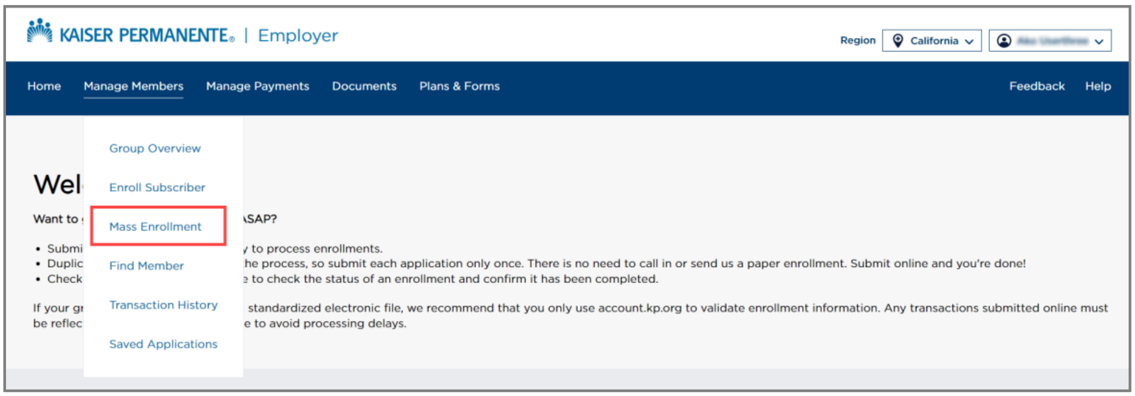
5. In California and Hawaii only, you will need to have Member Arbitration Agreement on file. If you have one, click **Maintain Agreement**. If not, you will need to **Upload** an agreement here to continue.
6. Read the Terms shown, using the scroll bar on the right. Click the checkbox stating your understanding 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

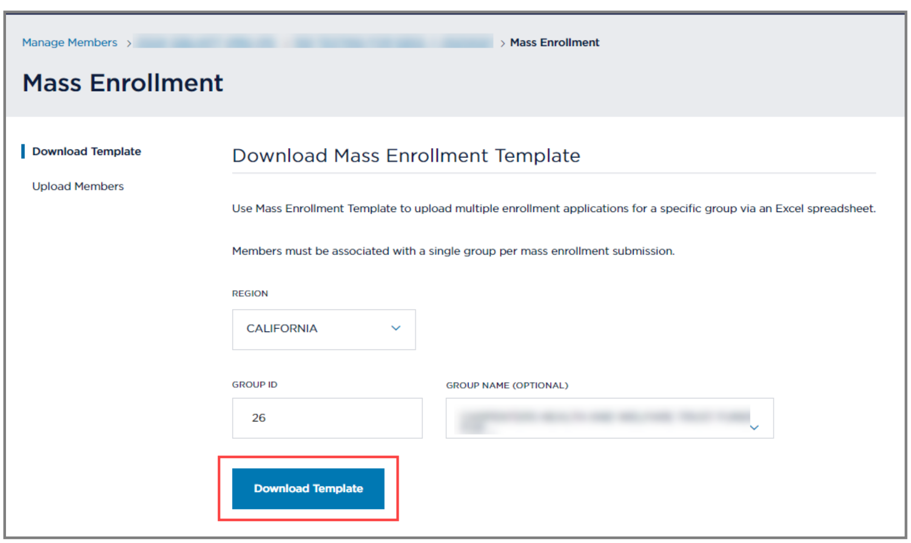
Use the specially formatted Mass Enrollment spreadsheet to fill in multiple applications simultaneously. Review individual applications as needed or submit them all with one click. Note, there is no limit to how many files you can upload within a 24-hour period, however, each file must have a maximum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

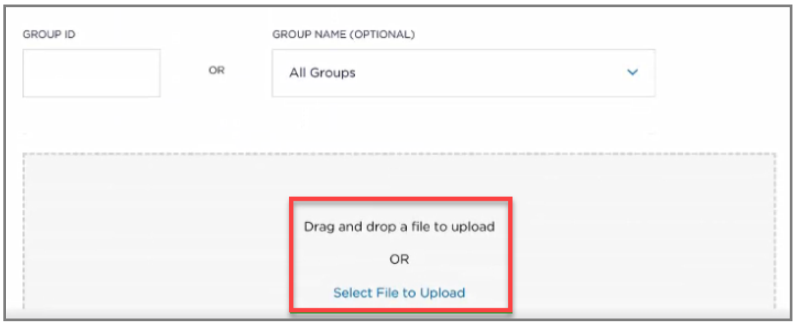


2. Enter the Region and Group ID, then click **Download Template** to download a customized spreadsheet template.

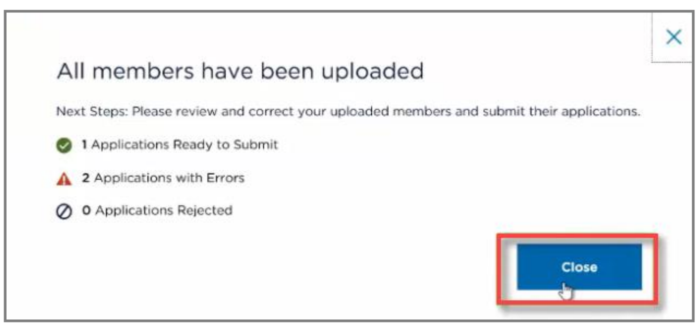


3. Complete the spreadsheet in Excel as directed. Just fill in member data; please do not modify the spreadsheet in any other way or the automatic upload will not work. If you need additional information about completing the spreadsheet, see the instruction tab included within the template.

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.

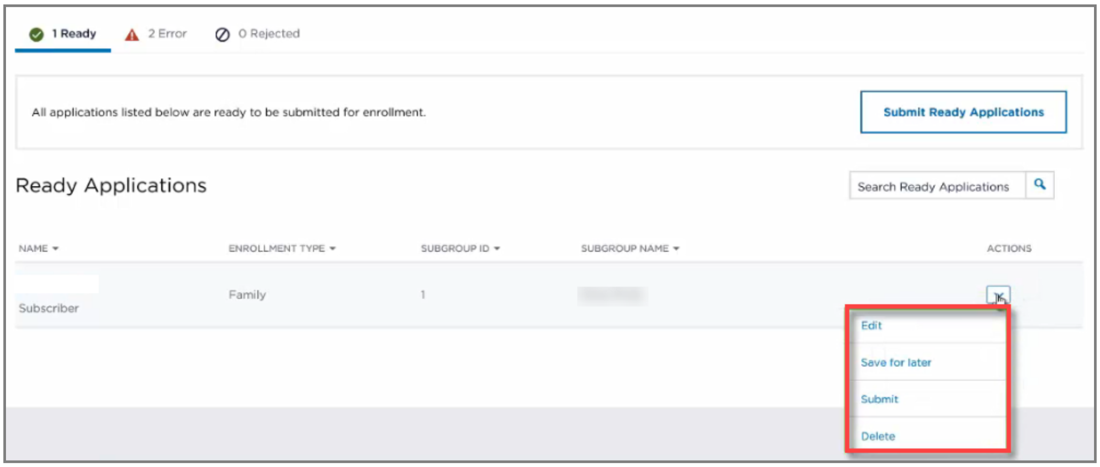


5. Click **Upload Members**.
6. When the upload is complete, a popup message will appear indicating how many applications are ready for submission, contain errors, or were rejected. Click **Close** to proceed.



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

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

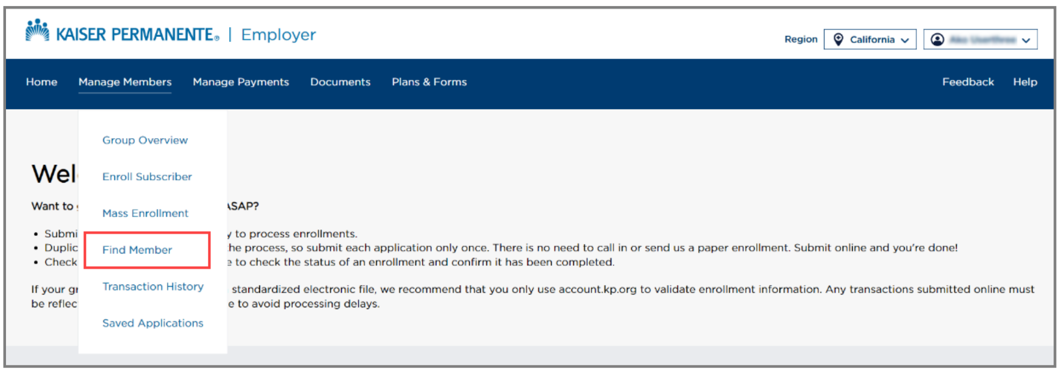
Locate a subscriber or family member from any screen.

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

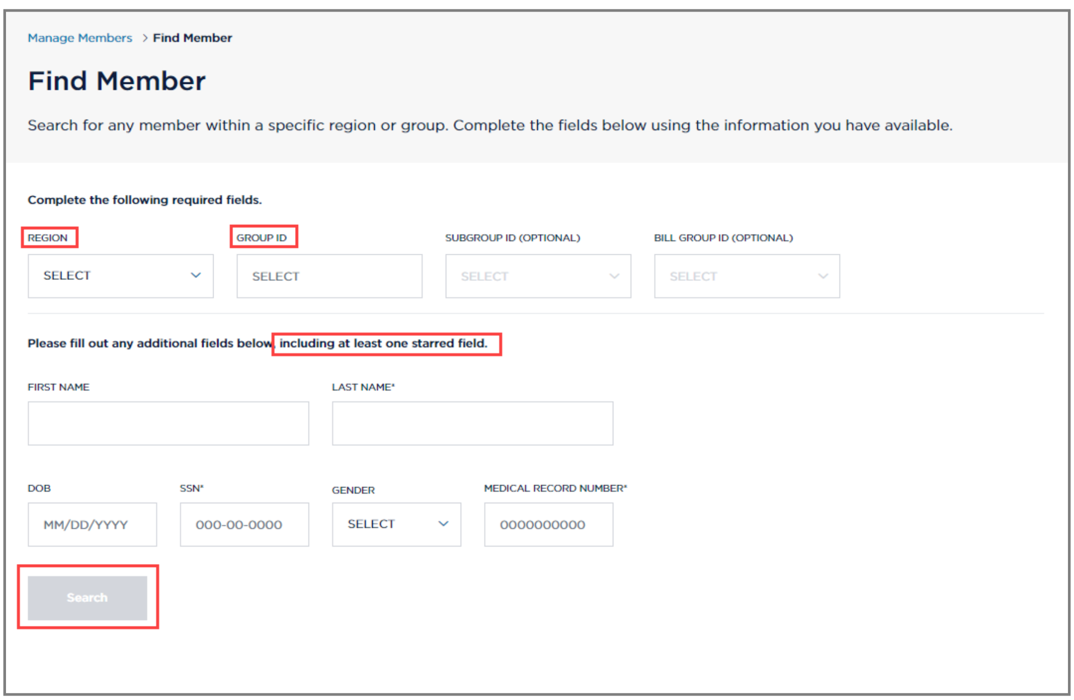
To find a member using the search feature do one of the following:

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**.



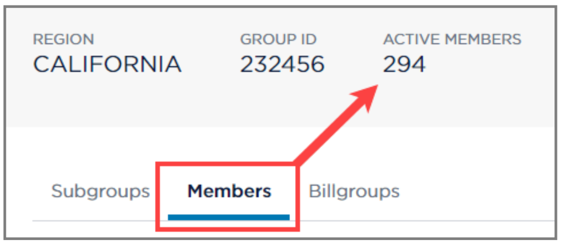
2. Fill in known member information to search for matching records. Start with region and group ID, then complete one or more of the starred fields for the best results.

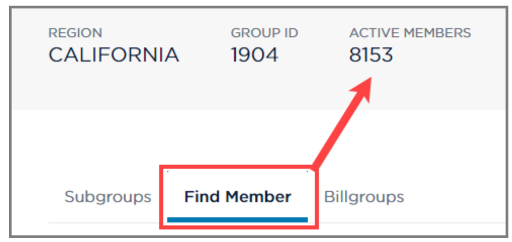


Option B: To **find a member from the Group, Subgroup, or Billgroup pages:**

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.





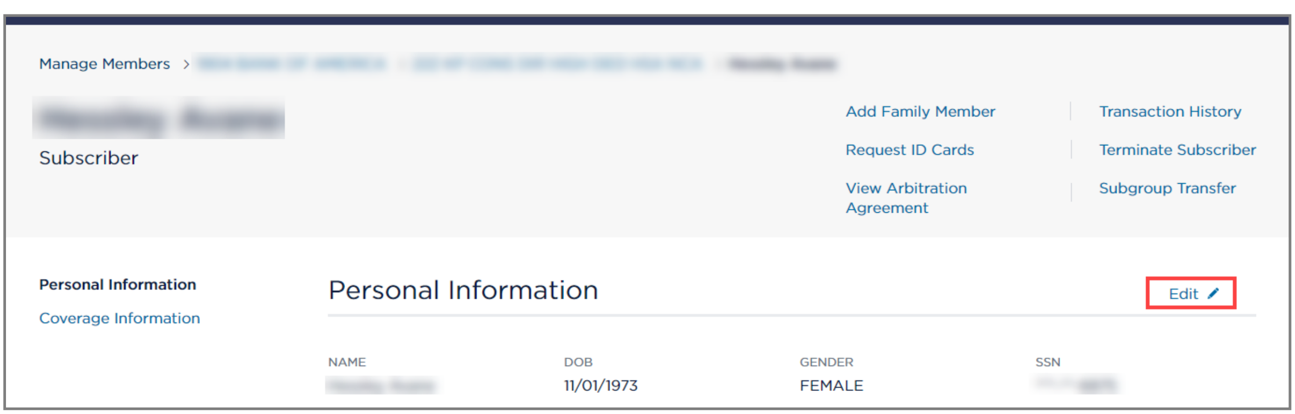
Updating Member Information

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

Watch the Updating Member Information video.

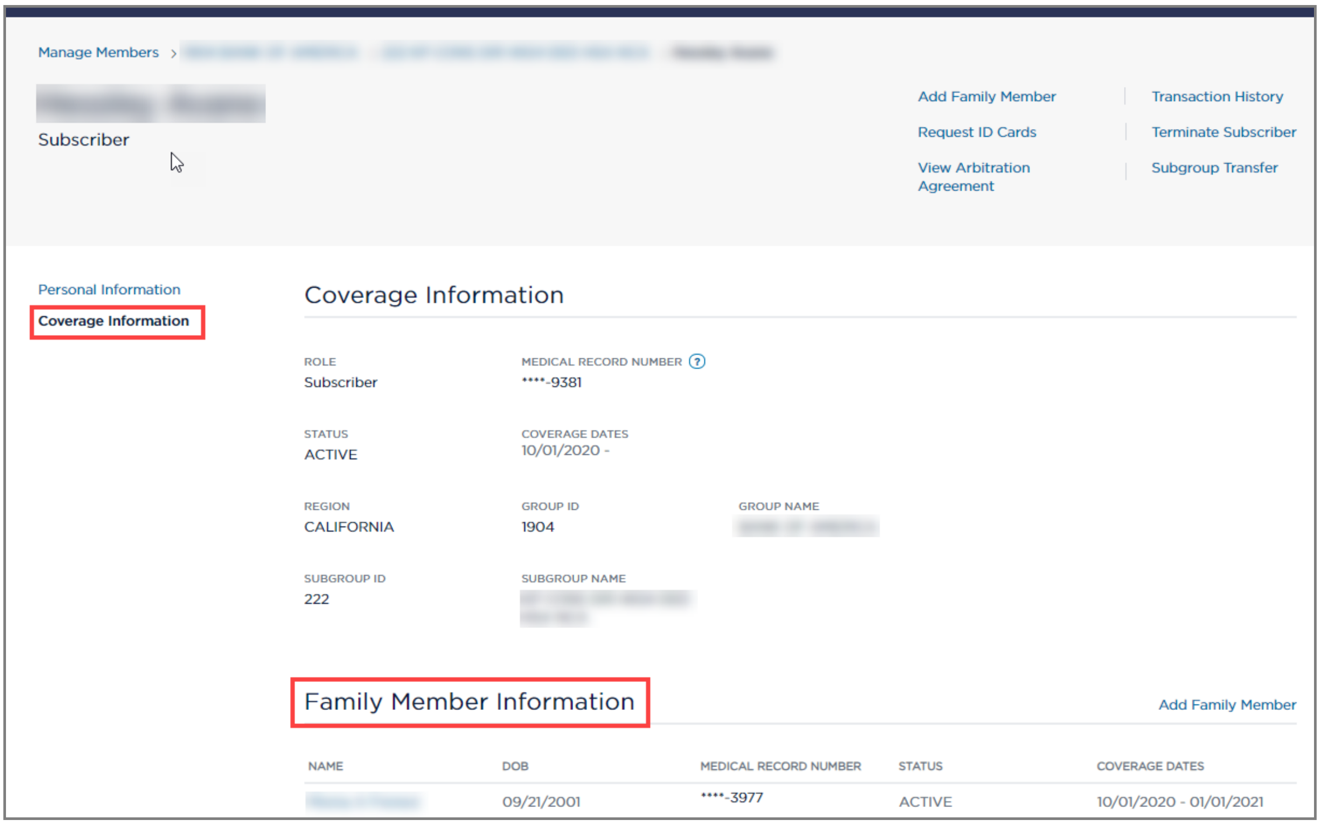
To update the **Personal Information** for a subscriber or family member:

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.



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.

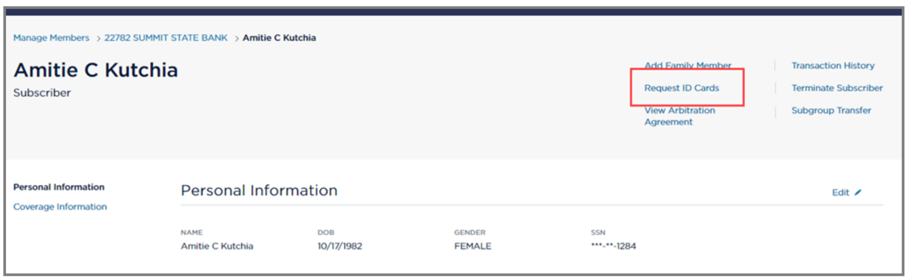
Requesting ID Cards

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.



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.

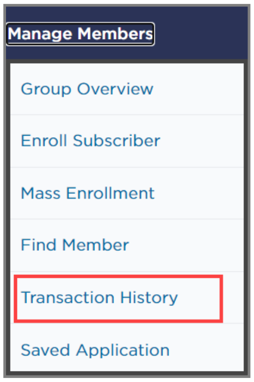
Viewing Manage Members Transaction History

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.

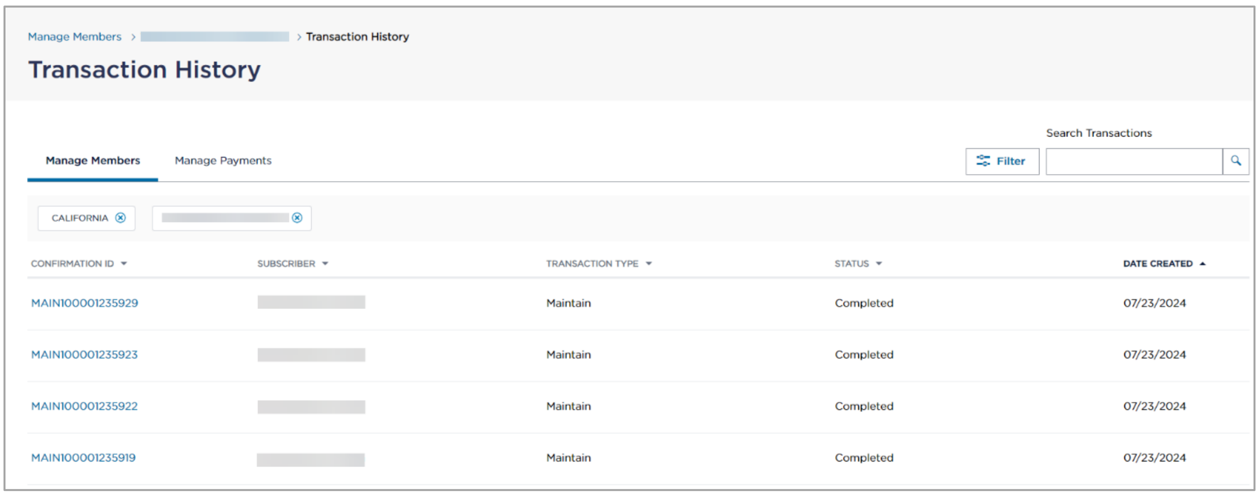


Option B. Use the **Transaction History** short cut on any group, subgroup, billgroup, or member page.

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.

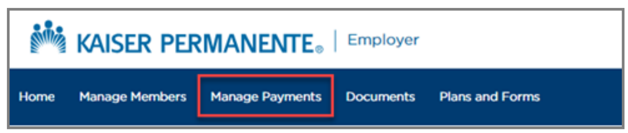


Manage Payments

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.

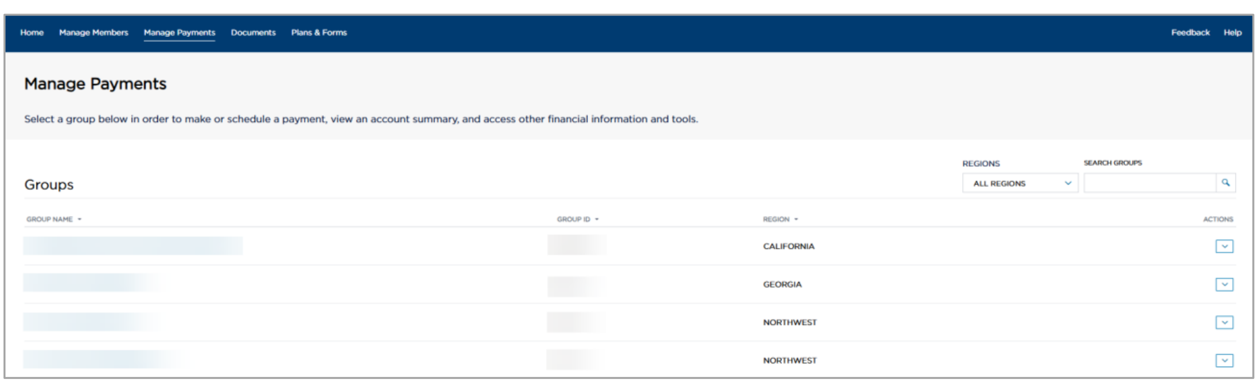
1. Click on Manage Payments in the menu at the top of the page.



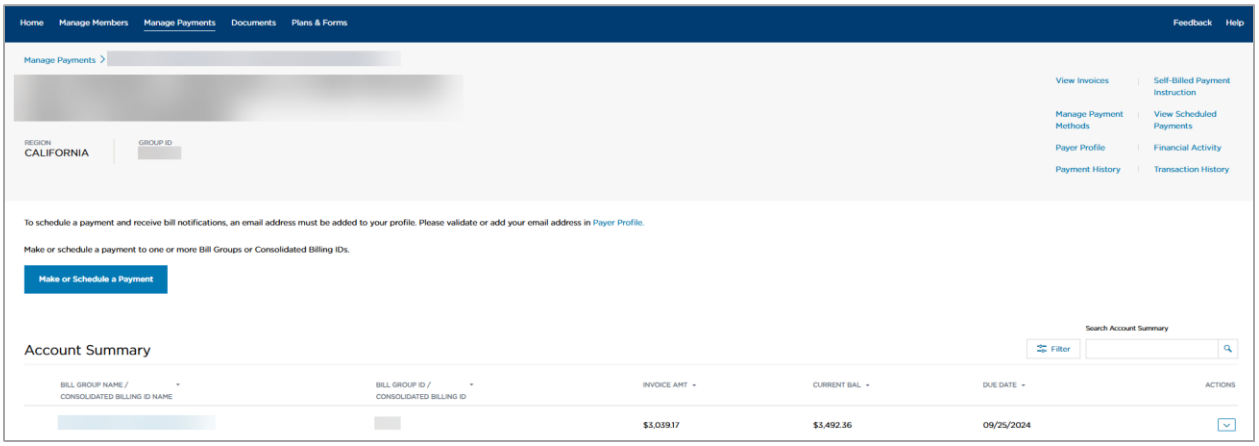
2. If you manage multiple groups, a Group List page will display. If you manage only one group, the page will open directly to that group's Account Summary page.

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.

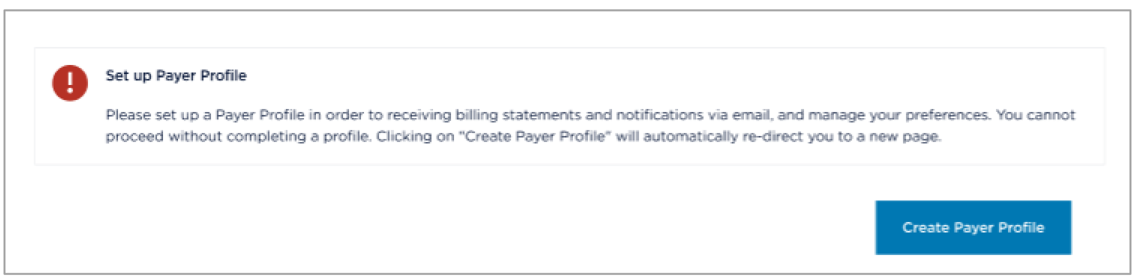
Multiple group page view



Single group page view



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.

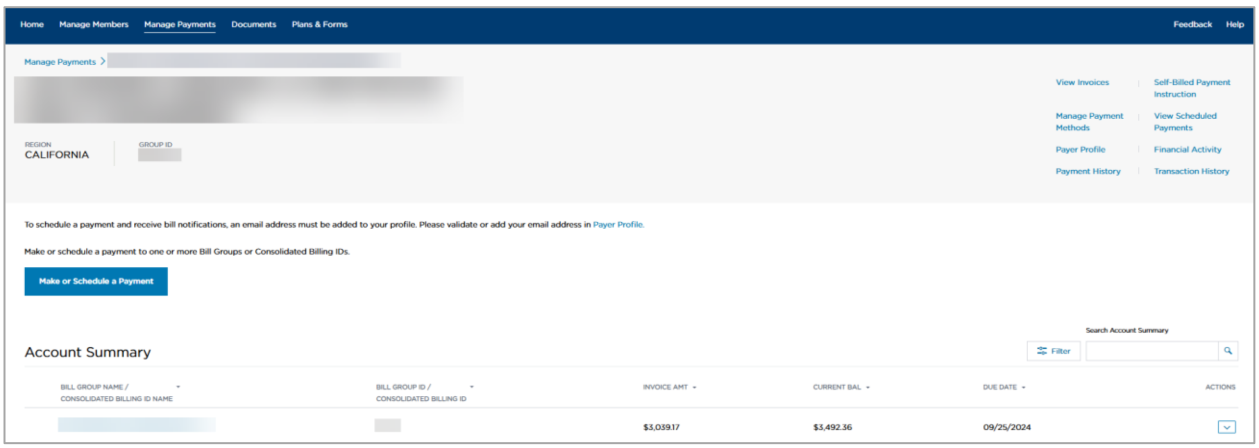


Account Summary

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.

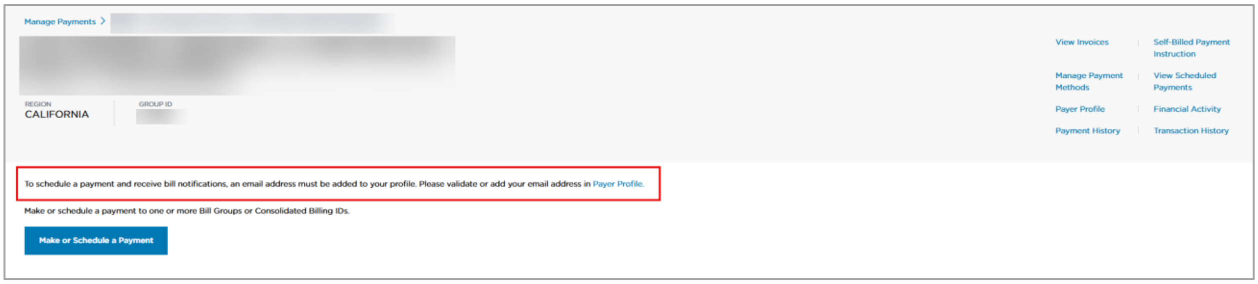
Account Summary Header: The header provides group information and group-level quick links for easy access to Manage Payments functions.



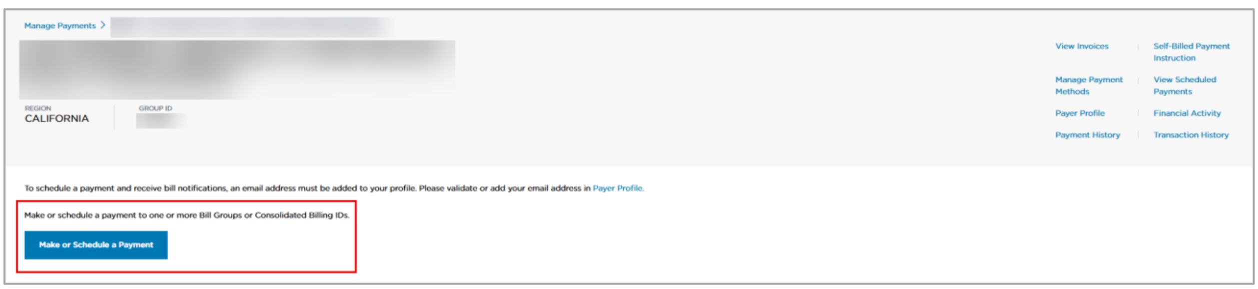
More detailed information for each page accessed from the quick links is provided in subsequent sections.

- 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

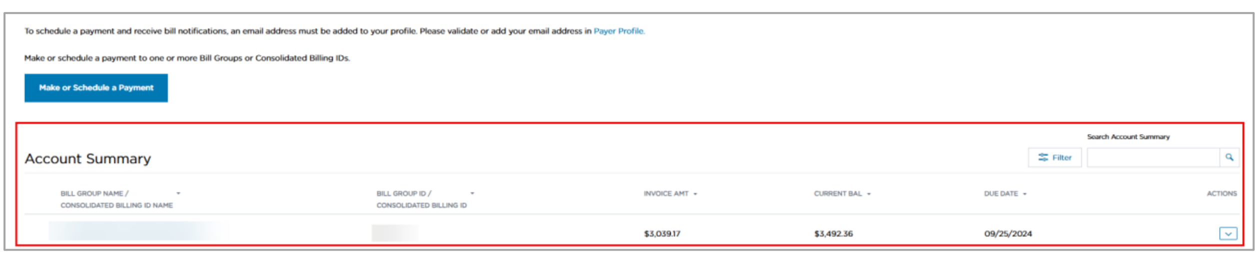
Payer Profile: Update and manage email notifications for E-Receipts, View Bill and Profile updates.



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.

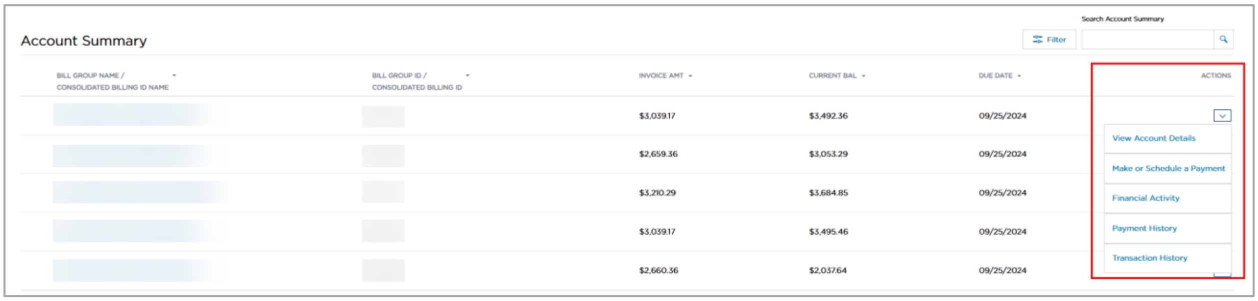


Account Summary Table: Provides high level information by Bill Group / Consolidated Billing ID and option to perform actions by Bill Group / Consolidated Billing ID.



- Bill Group /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.

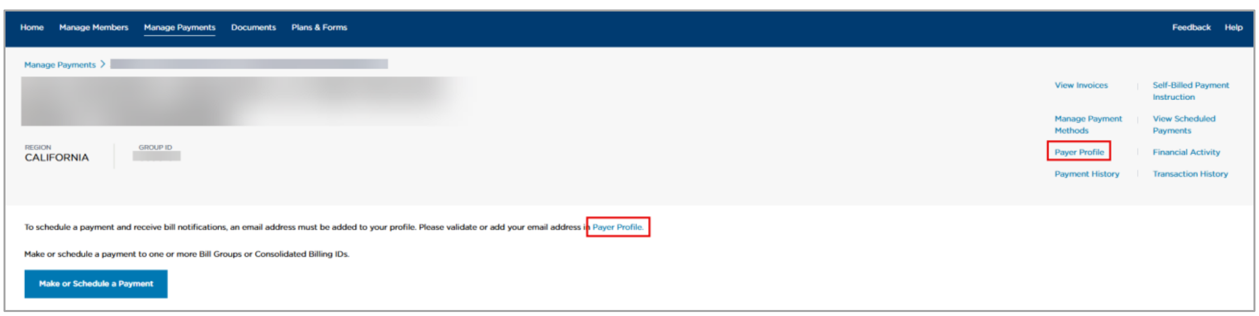


Managing your Payer Profile

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

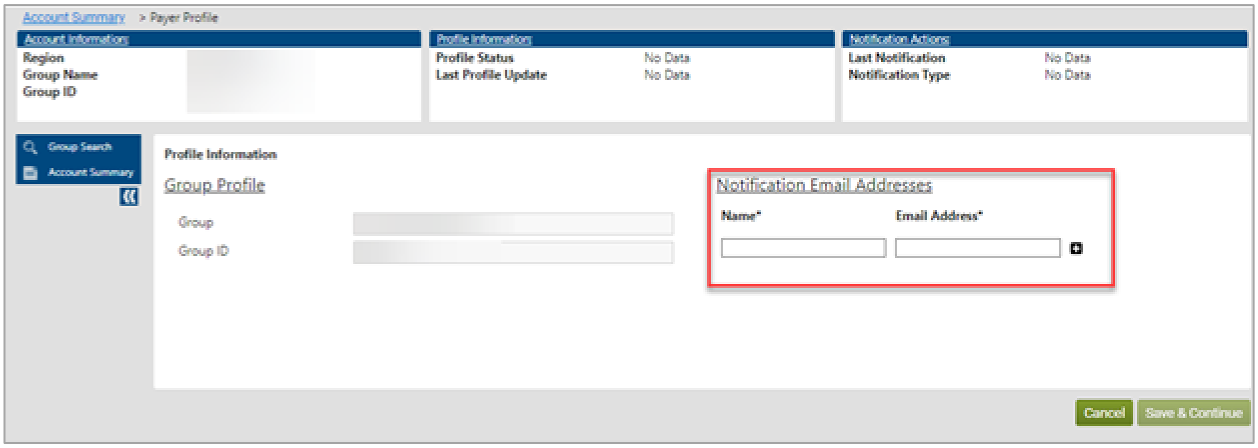
Watch the [Setting Up and Confirming Payer Profiles]() video.

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



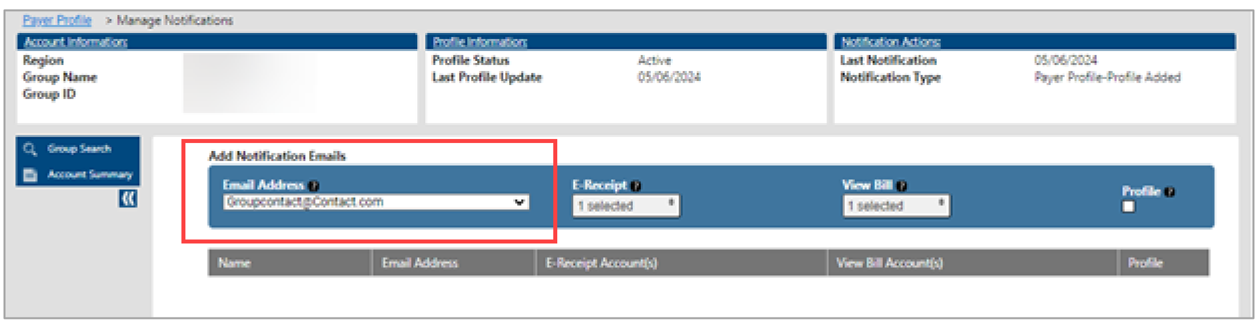
Setting Up Email Notifications

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

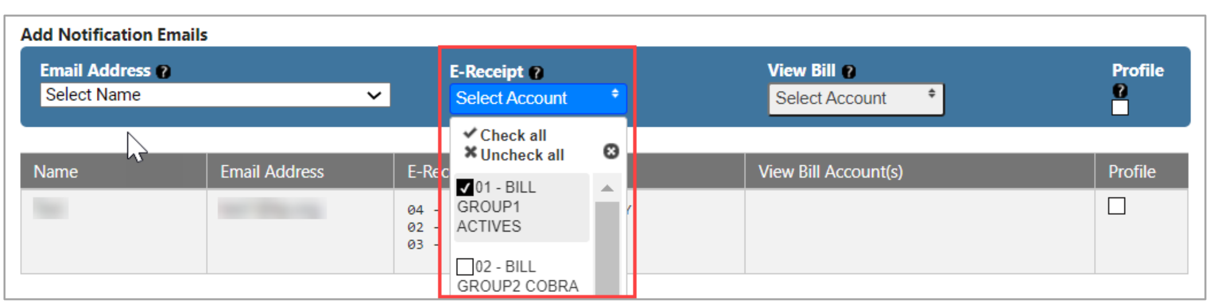


NOTE: To enter multiple email addresses, click the expansion [+] icon.

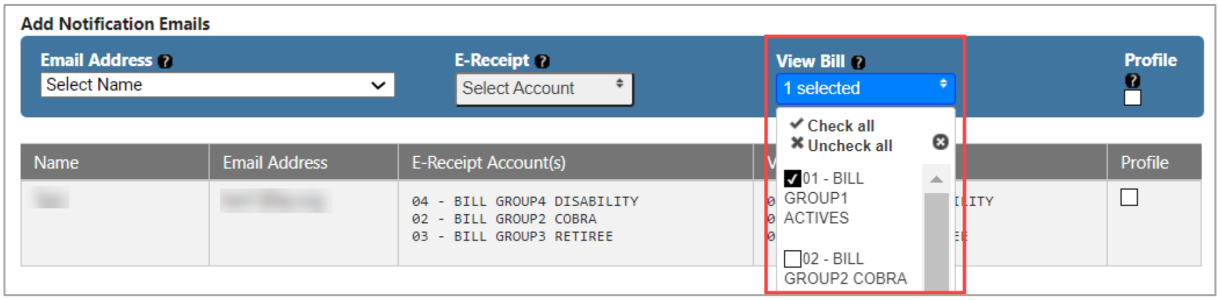
2. Click **Save & Continue**.
3. Confirm or select the email address from the Email Address dropdown.



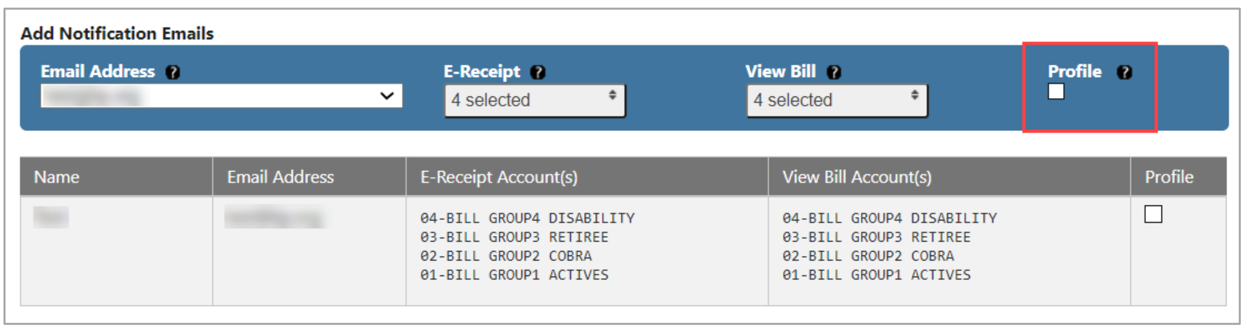
4. For **E-Receipt** (Electronic Receipt), click **Select Account** to select a Bill Group to receive an email notification for online payments. Users can click **Check all** to get notifications for all Bill Groups.



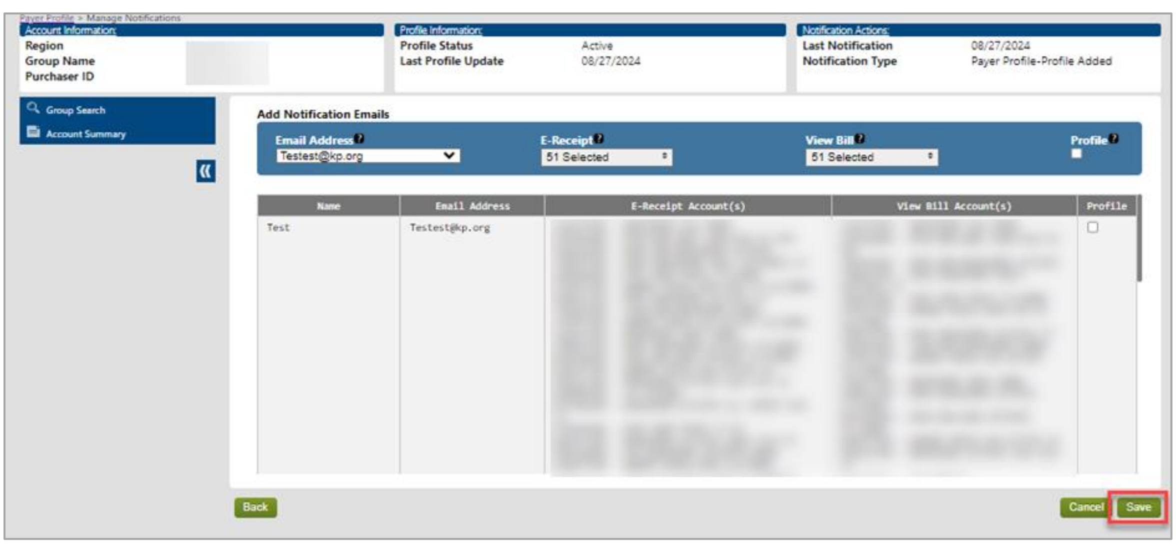
5. Under **View Bill**, click on **Select Account** to select a Bill Group to receive an email notification when a premium bill is ready to view online. Users can click **Check all** to get notifications for all Bill Groups.



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

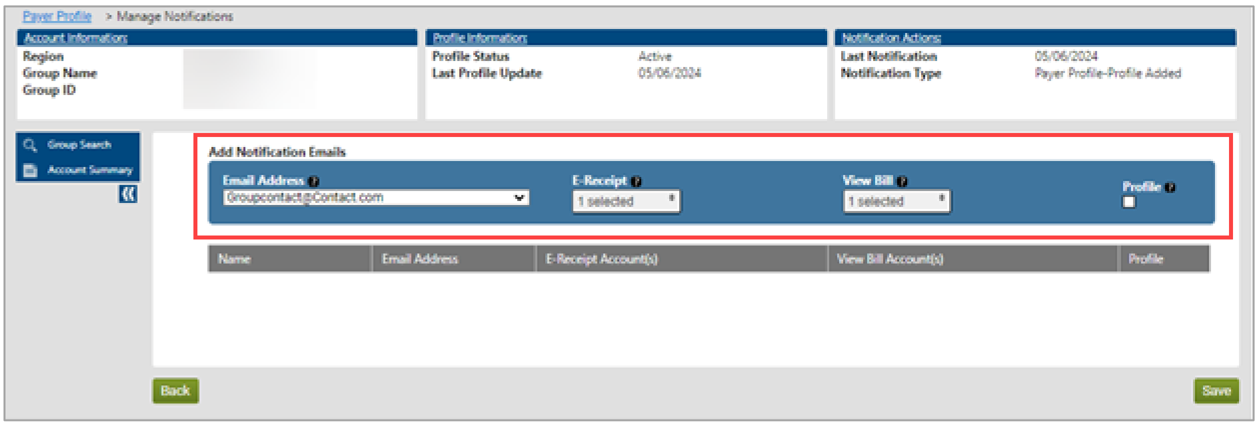


7. Click **Save.** All changes will be displayed for reference. If you do not see the accounts listed in the table (as shown below), this indicates the Payer Profile set up is not complete.



Editing Email Notifications

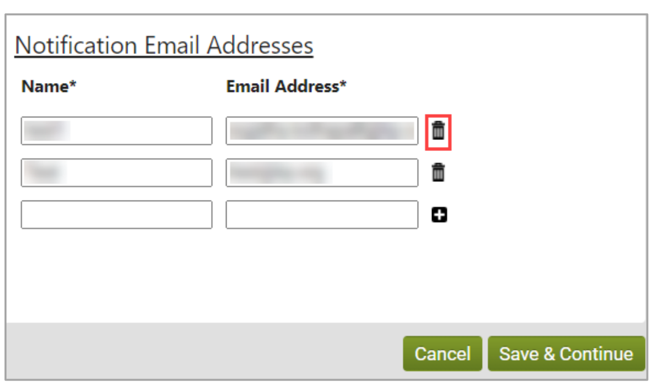
1. To edit email notifications, click **Payer Profile** on the Account Summary page.
2. On the Payer Profile screen, confirm information is correct and click **Save & Continue**.
3. Select the address to be edited from the Email Address dropdown.



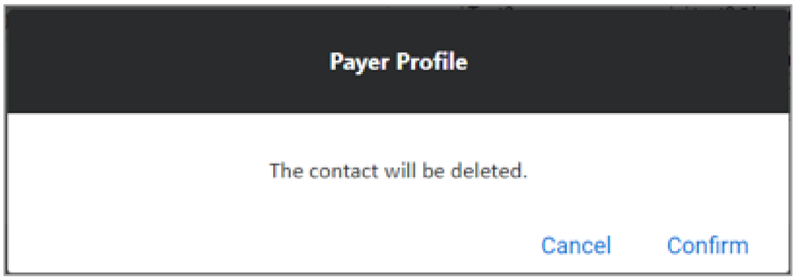
4. Under **E-Receipt** and **View Bill**, any notifications previously checked will be marked by default. Mark or unmark checkboxes as needed to adjust the notifications received.
5. Click **Save.** All changes will be displayed for reference.

Deleting Email Notifications

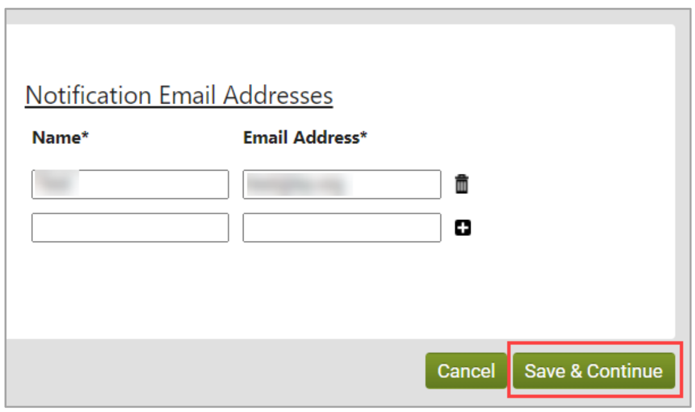
1. To delete an email from the Payer Profile, select the trash icon.



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



3. Click **Save & Continue**.



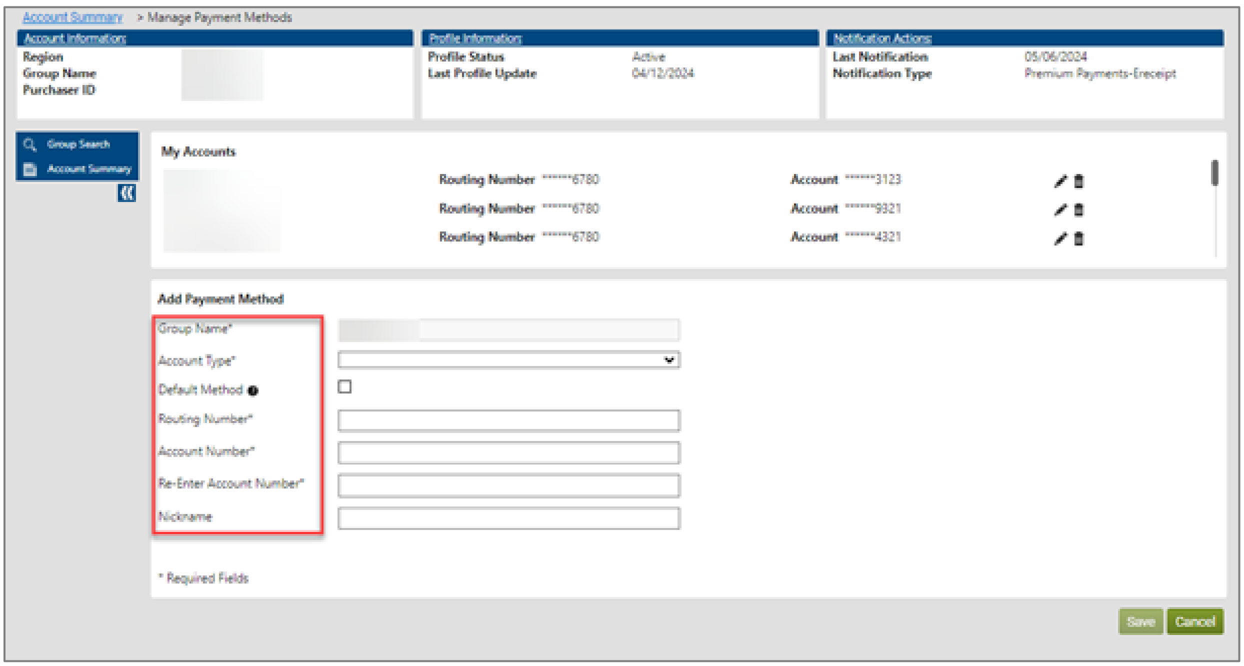
Managing Payment Methods

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.

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.



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

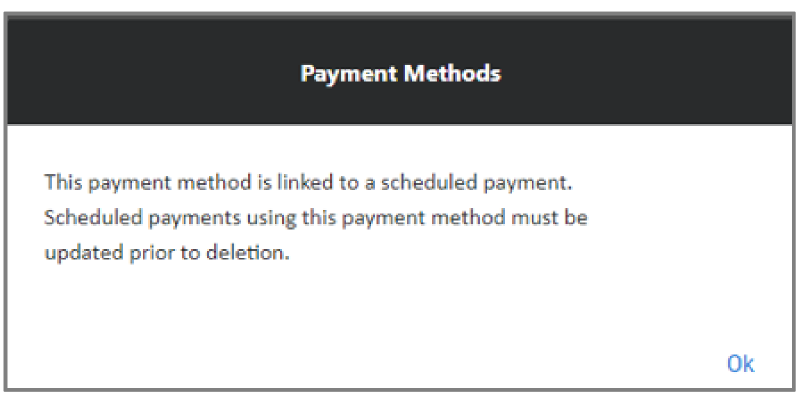
1. Click on Manage Payment Methods.
2. Click on the pencil icon.
3. Edit the information and click **Save**.

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.

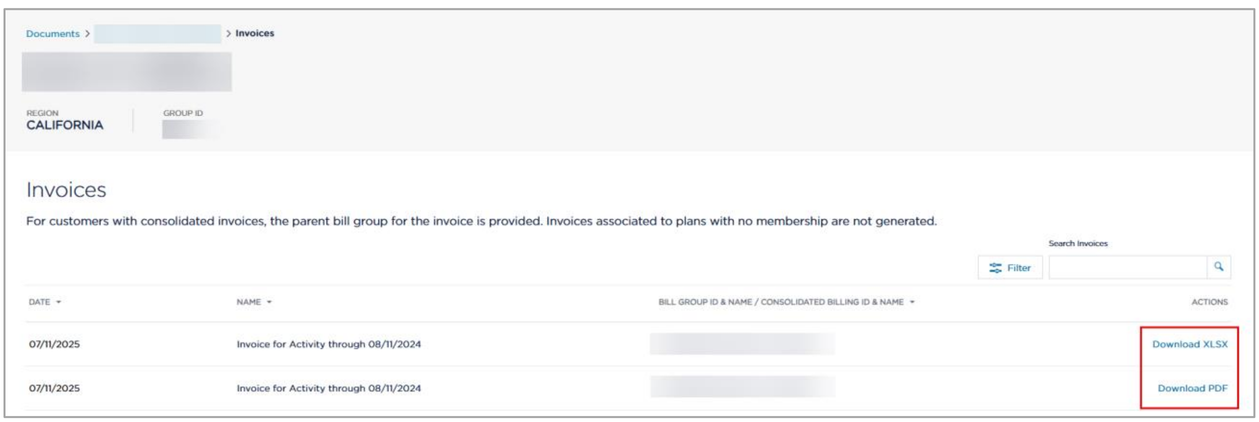


Viewing and Downloading Invoices

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.

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



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

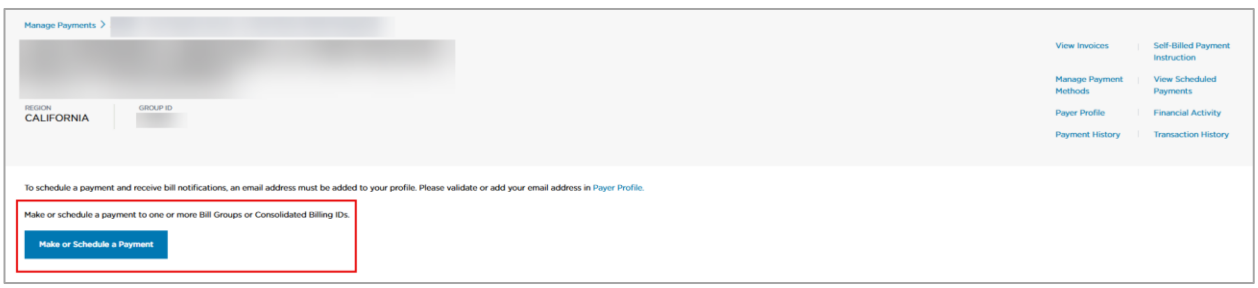
Users can set up a recurring monthly payment (autopay) or set up a one-time payment to process on a future date.

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.

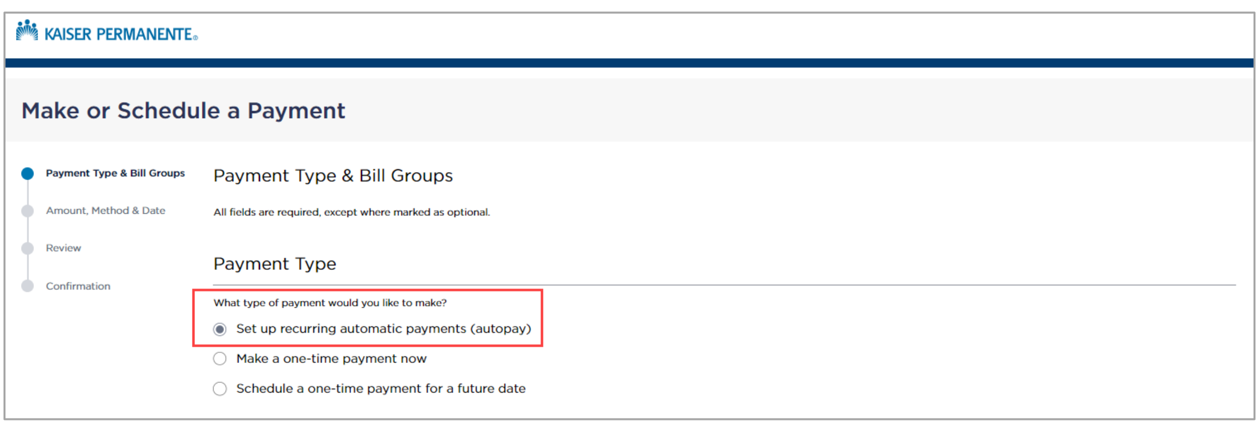
Scheduling a Recurring Payment (Autopay)

Watch the Setting Up and Managing Autopay video.

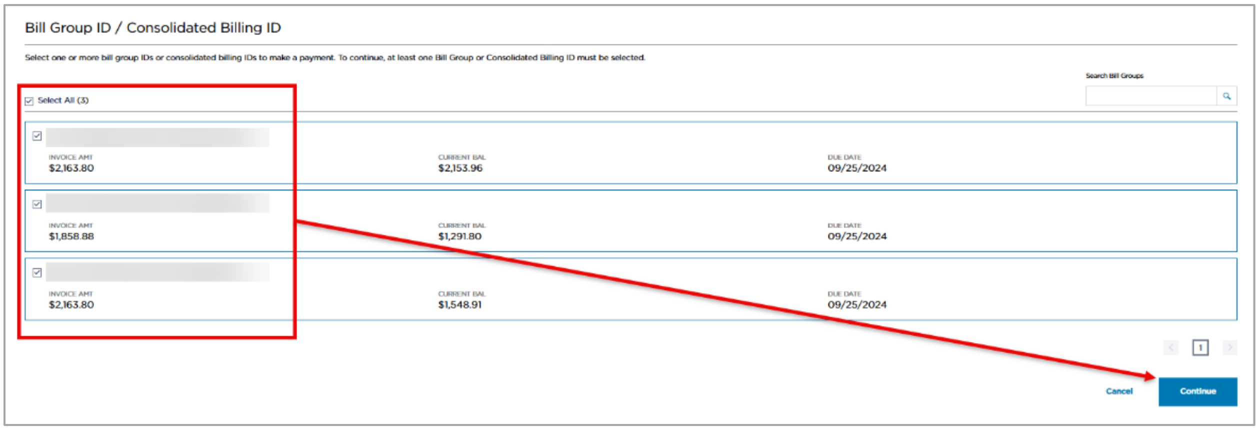
1. Set up a recurring, monthly, automatic payment by clicking the **Make or Schedule Payment** button on the Account Summary page. Users can also use the Make or Schedule a Payment option from the Action dropdown menu of any Bill Group / Consolidated Billing ID in the Account Summary table.



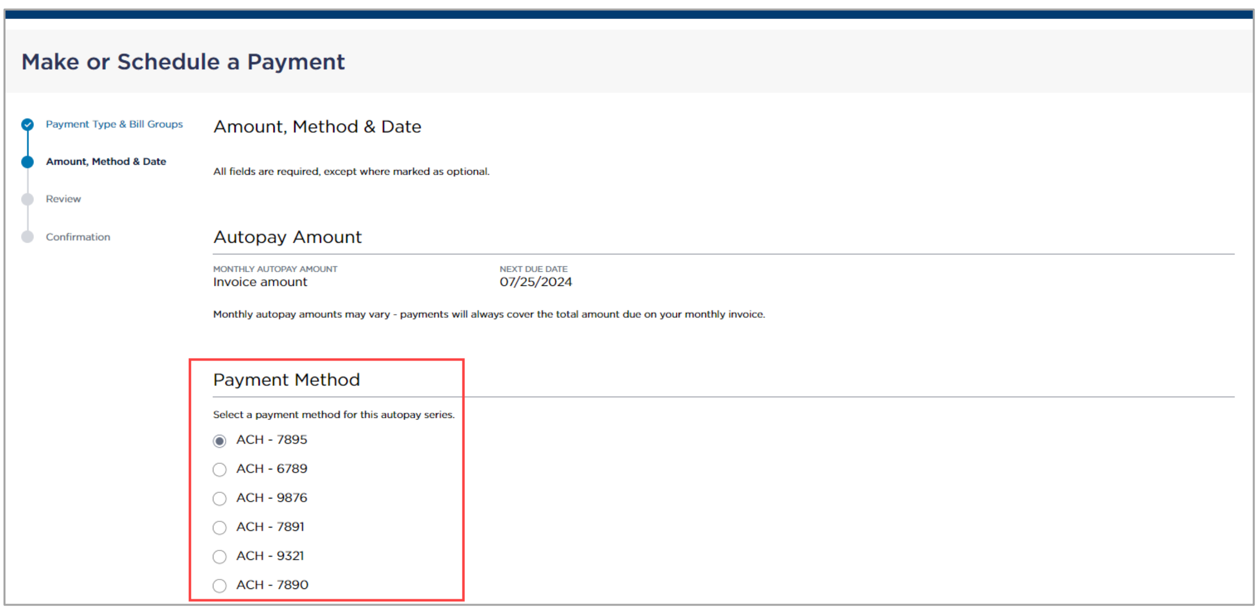
2. On the Payment Type and Bill Groups page, select **Set up recurring automatic payments (autopay)**.



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



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**.

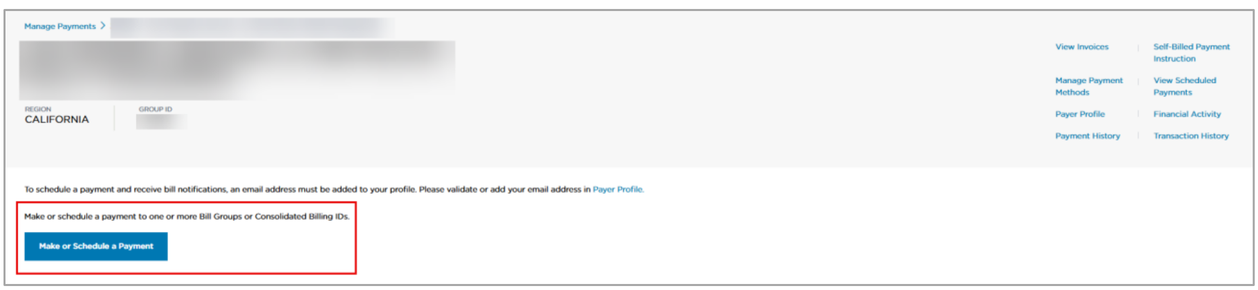
NOTE: We recommend setting automated payments to at least 4 days prior to the invoice Payment Due Date to be reflected on the next invoice.

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.



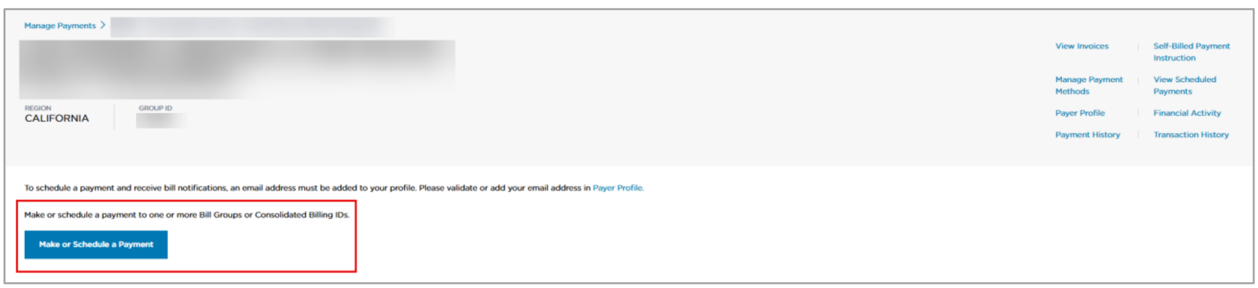
2. On the Payment Type & Bill Groups page, select **Schedule a one-time payment for a future date** and choose the Bill Group(s) for the future scheduled payment. Click **Continue**.
3. On the Amount, Method & Date screen, select the **Payment Amount** (invoice amount, current balance, or customize the 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.

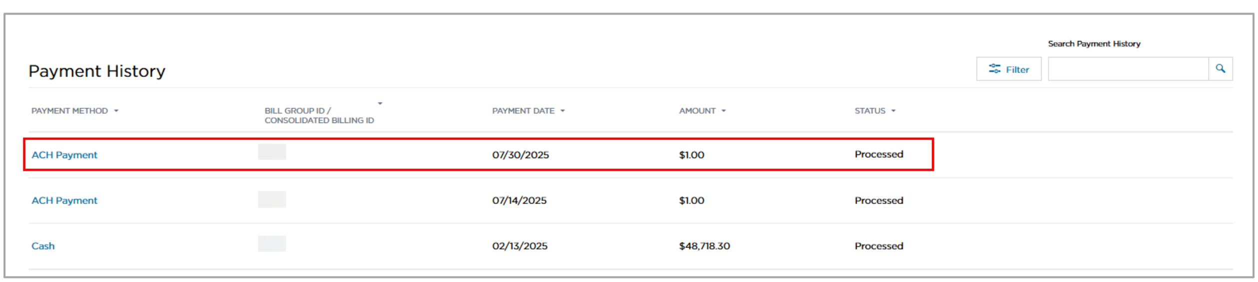
Watch the Viewing Payment History, Financial Activity, and Transaction History video.

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.



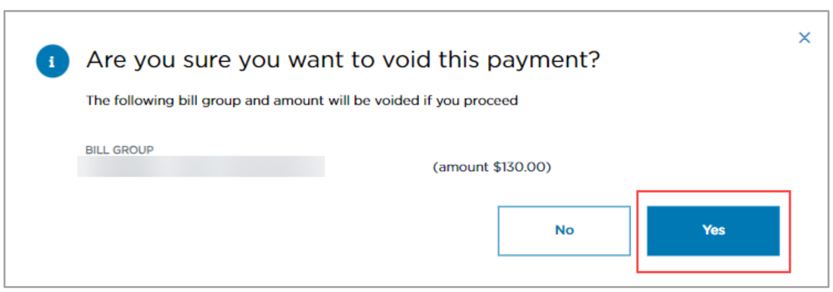
Voiding a Payment

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.

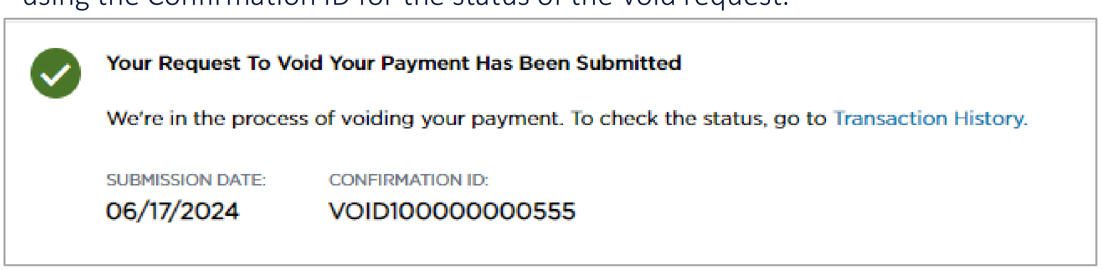
NOTE: For groups in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington) who have not yet updated to the new user experience, please refer to the [former online experience] for this section.

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

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



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.



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.

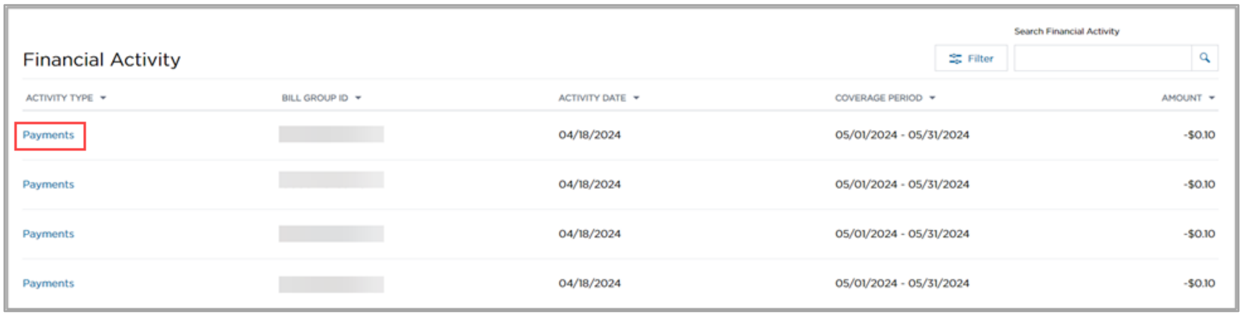
Watch the **Viewing Payment History, Financial Activity, and Transaction History** video.

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.



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.

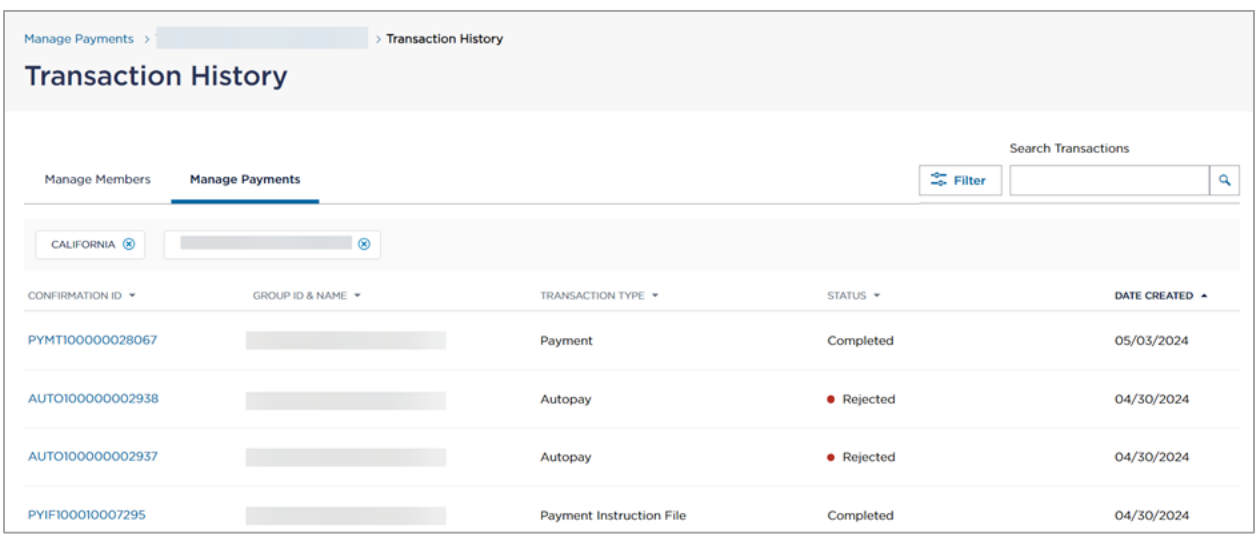
The Manage Payments tab under Transaction History will display all Manage Payments transactions submitted online. Access the Transaction History page by doing one of the following:

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.

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.



Submitting a Self-Billed Payment Instruction File

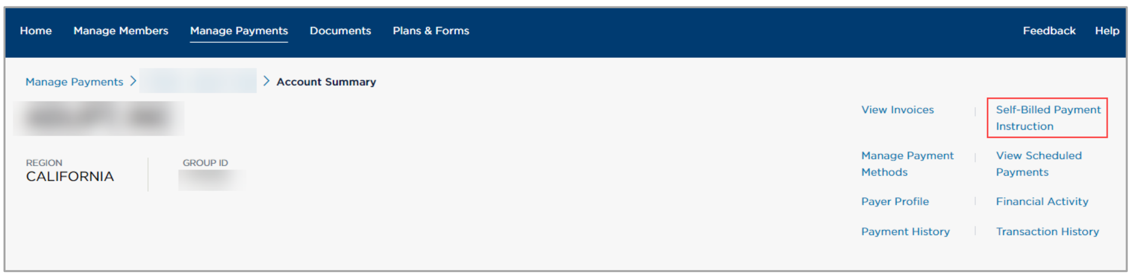
Online submission of Payment Instruction Files

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

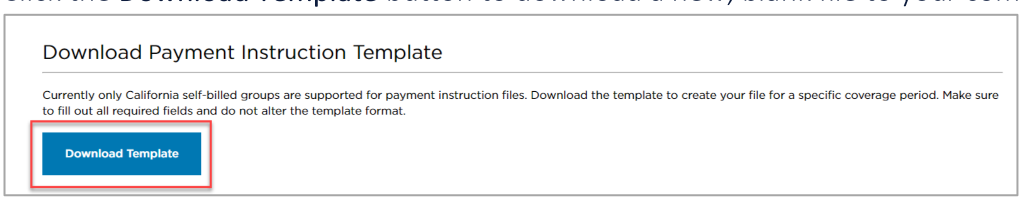
Self-Billed groups now have the option to submit their monthly Payment Instruction File online. A few things to note about submitting a file online:

- 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**

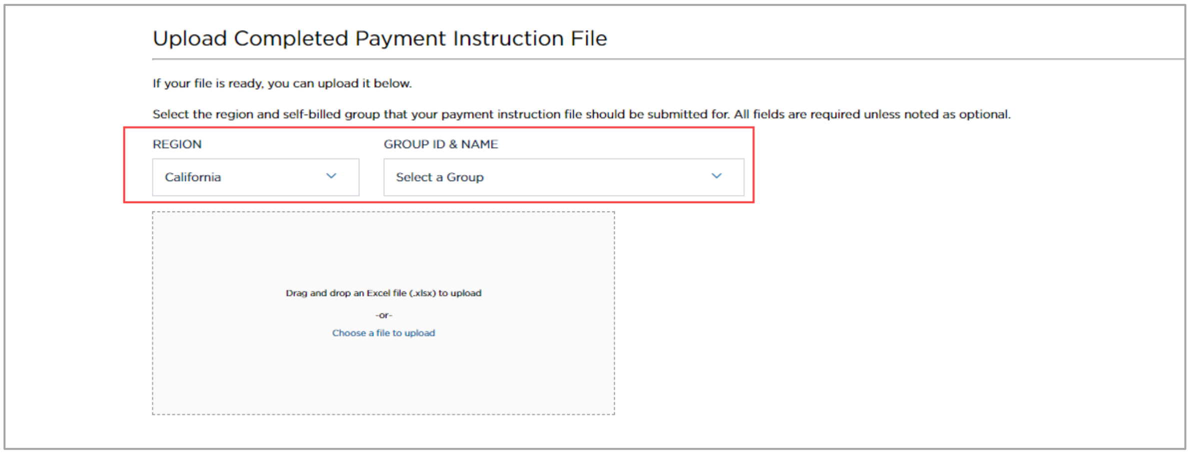


2. Click the **Download Template** button to download a new, blank file to your computer.

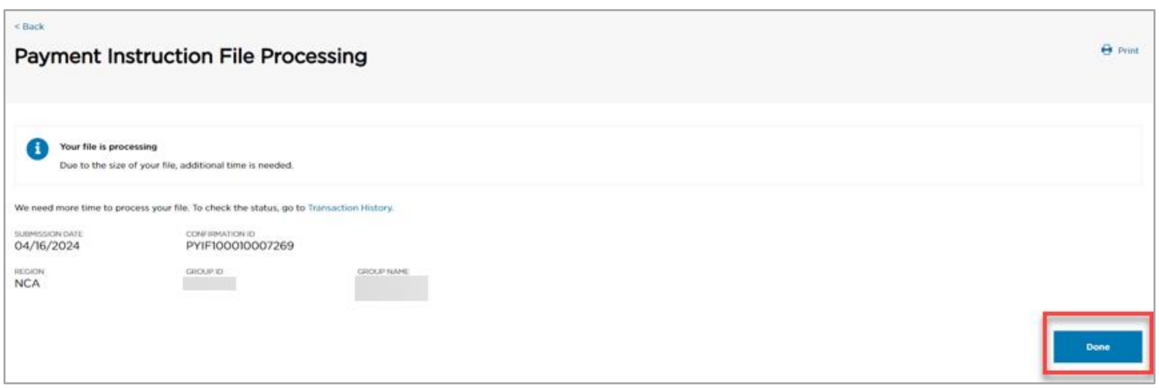


3. Save the file and fill it out as you normally would. A few things to note about filling out the template:
   - Do not change the name or the order of any of the columns. This will cause the file processing to fail.
   - You must fill in all required fields.
   - Do not leave blank rows of data.
   - Do not leave any other tabs, including hidden tabs, in the template prior to submission. Doing so will cause the file processing to fail.

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



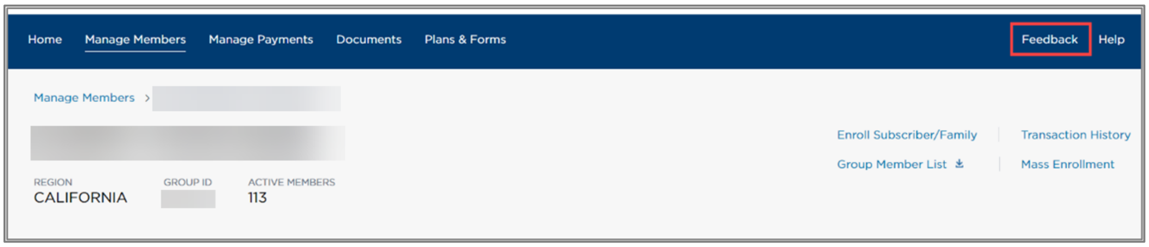
5. Click **Submit** once the file is successfully uploaded. A confirmation page will appear once the file has been submitted and sent for processing.
6. You can check the status of your Payment Instruction File submission in **Transaction History**. If there was an issue processing your file, the status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



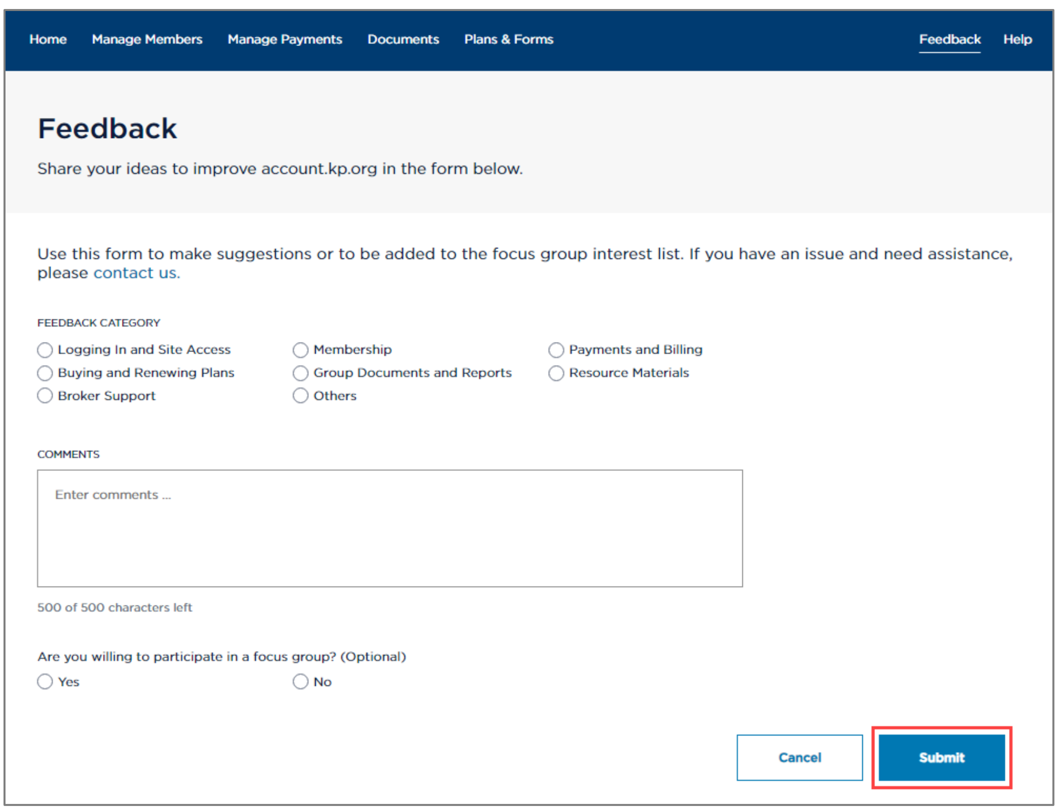
Feedback

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.



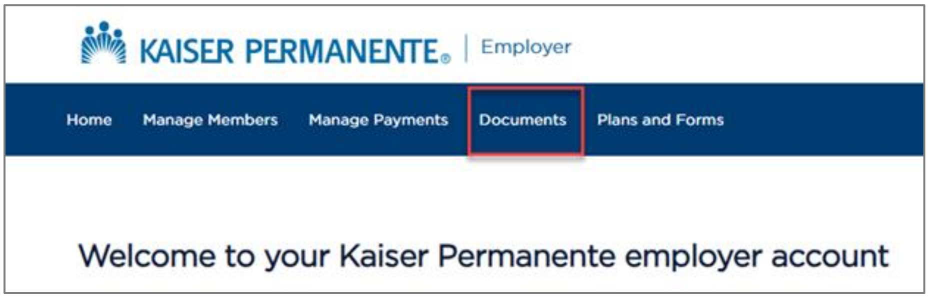
2. Answer the questions on the Feedback form and click **Submit** to send your responses.



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.

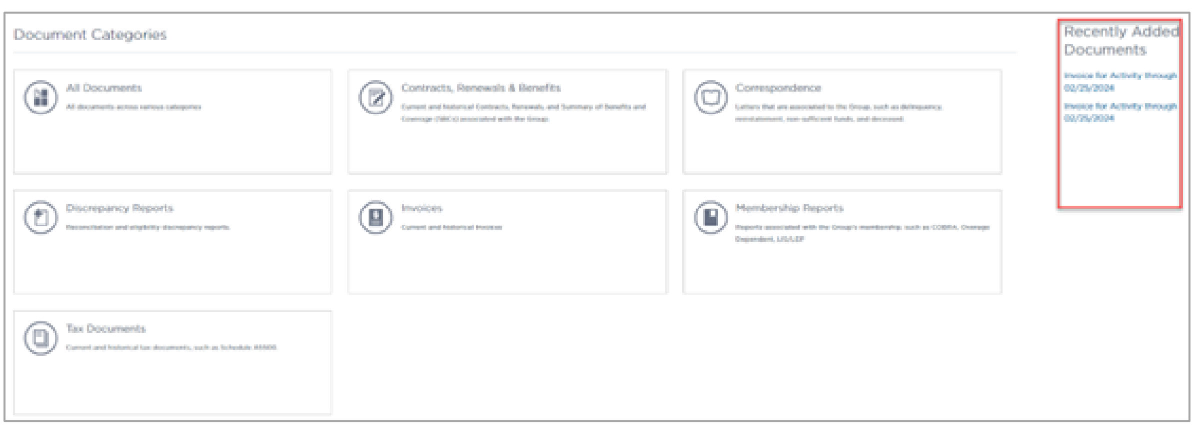
Watch the [Using the Documents Section](#) video.



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.

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.	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. To manage employees' Kaiser Permanente health plan membership online, please have your Primary Group Administrator fill out this online account services application form online. For additional information and options click 'Need help'.
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?	Review detailed instructions with screenshots here. Monthly automatic payments (autopay) can be set up by selecting the **Make or Schedule a Payment** button on your Account Summary page. Select the option for recurring payment and any Bill Groups you would like to include in the monthly autopay. Complete each step as instructed then click **Submit**. Your payment will automatically process every month on the day you selected.

Questions	Answers
How do I request a refund?	For refund requests, please contact Membership Administration: California: Small Business Accounts 800-731-4661, option 2 Large Business Accounts 800-731-4661, option 4 For regions outside California: 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 Contact Us 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.

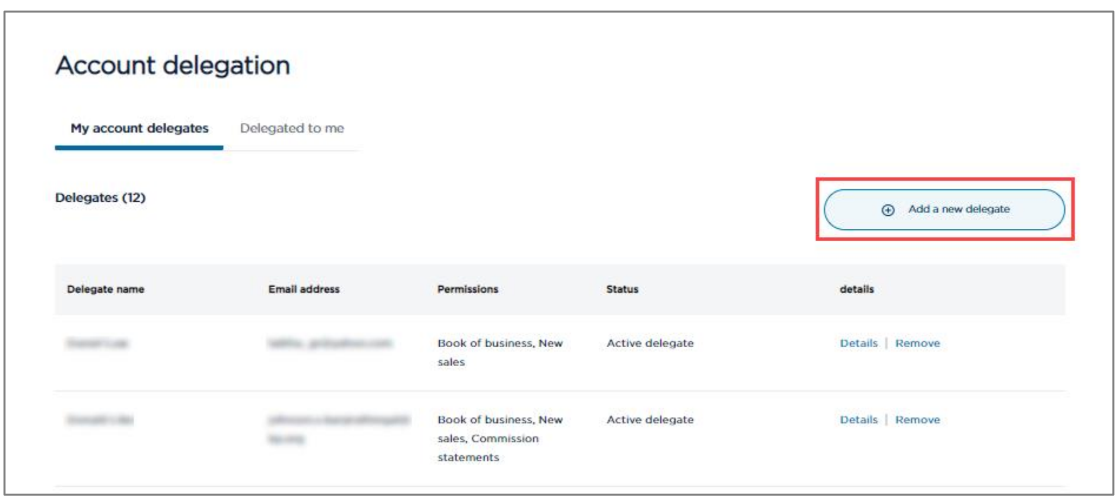
How to manage secure account access

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

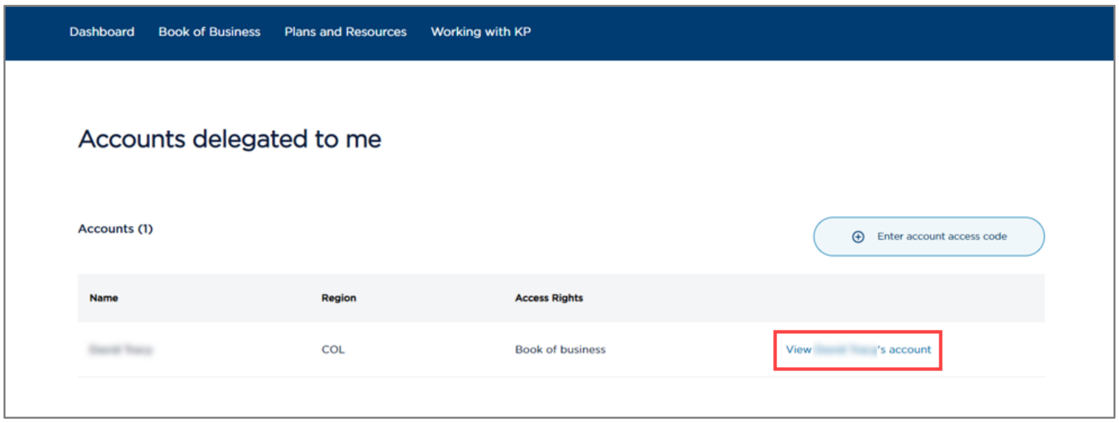
A Broker of Record (BOR) can now delegate access to their Book of Business to associates within their firm. Permissions can be set for firm associates to view group information and even perform updates to group membership.

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.



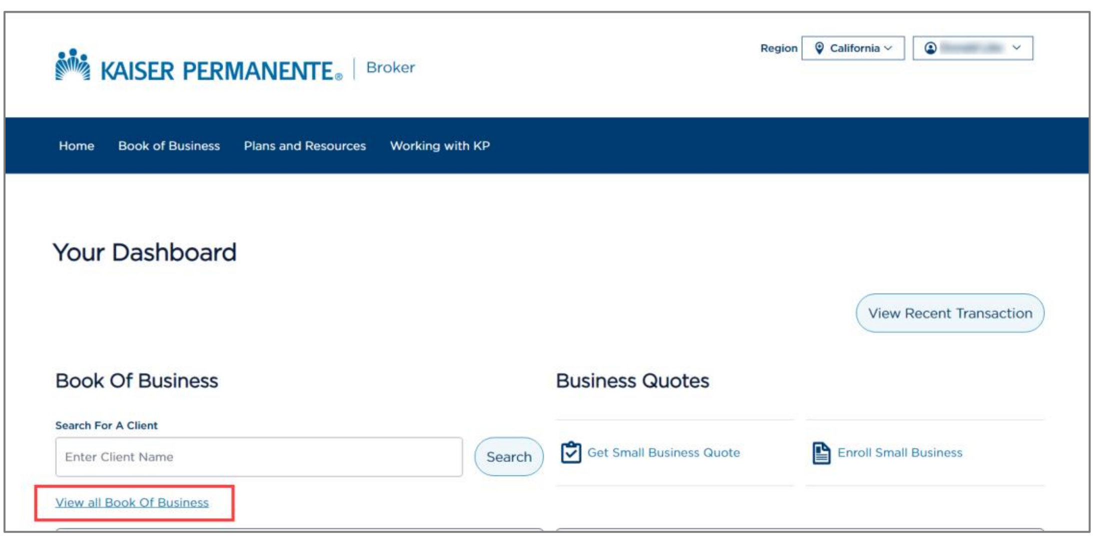
The delegate will receive an email with instructions to sign in. Delegates will receive a code each time they are given access to a new Book of Business. These delegates can view the book of business they have been granted access to by selecting **Accounts delegated to me** in the account utility menu.

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



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**.

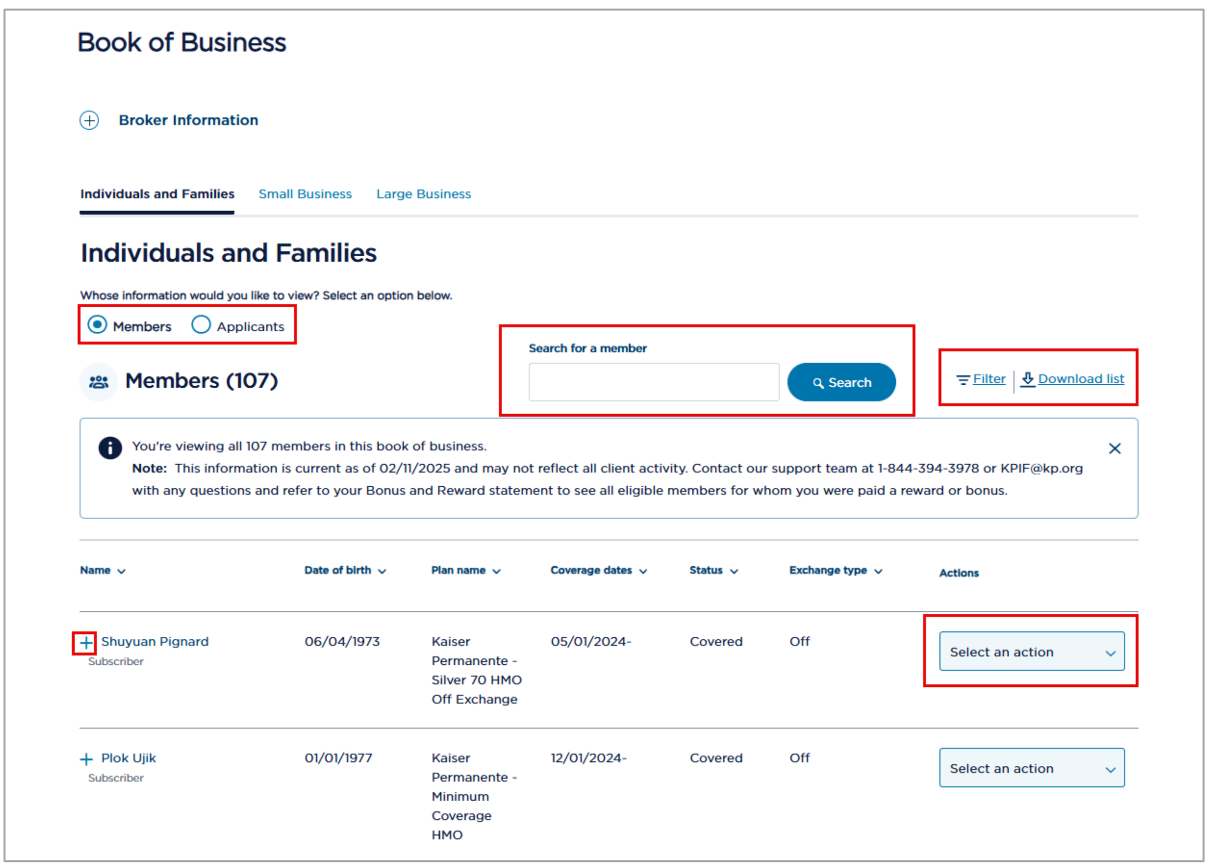


The Principal Agent will be prompted to complete a Business Associate Agreement (BAA) at their initial log in. Once the Principal Agent submits the BAA, other firm agents can view members and applicants under the **Individuals and Families** tab of their Book of Business. Non-principal agents will receive 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:

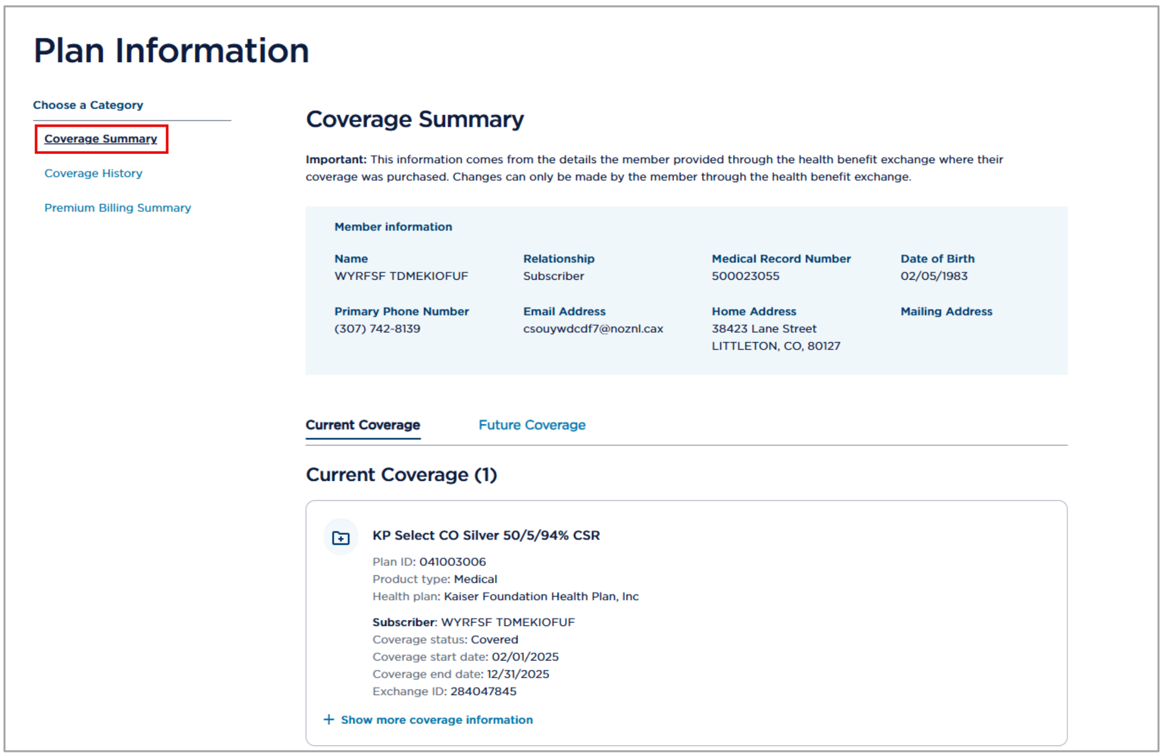
- **Coverage Summary** - additional coverage details (including MRN) and demographic information
- **Coverage History** – previous KPIF coverage information (excluding CA)
- **Premium Billing** - premium billing information including BUID and if autopay is set up

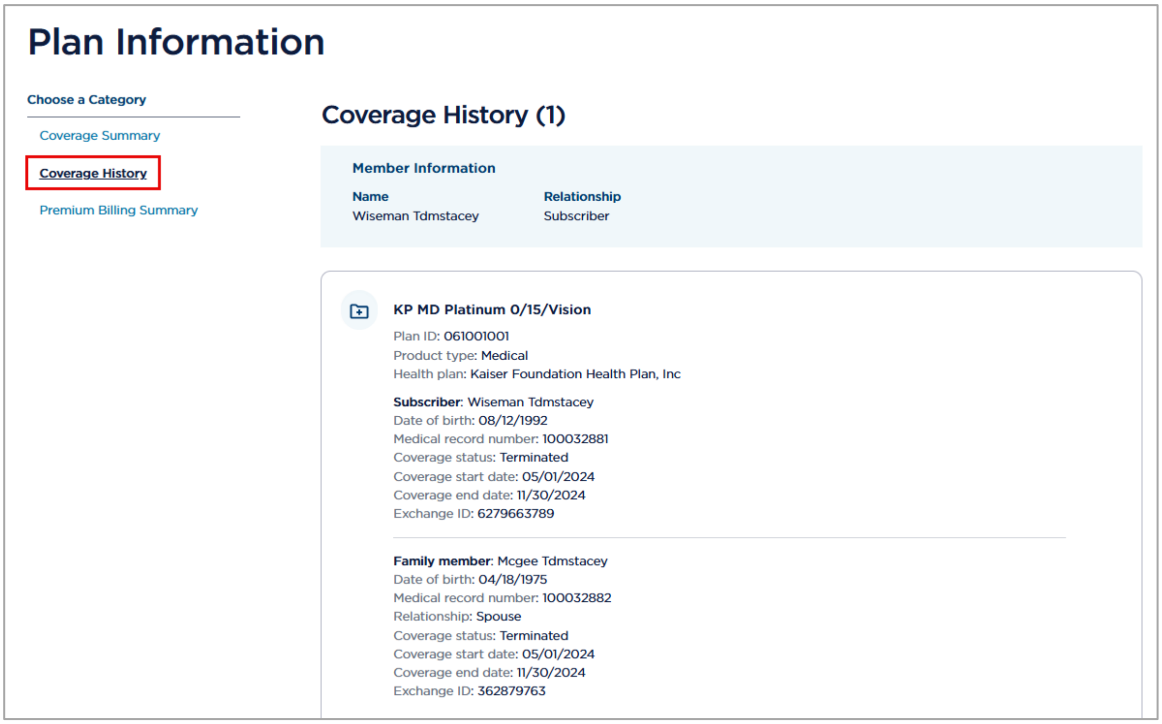


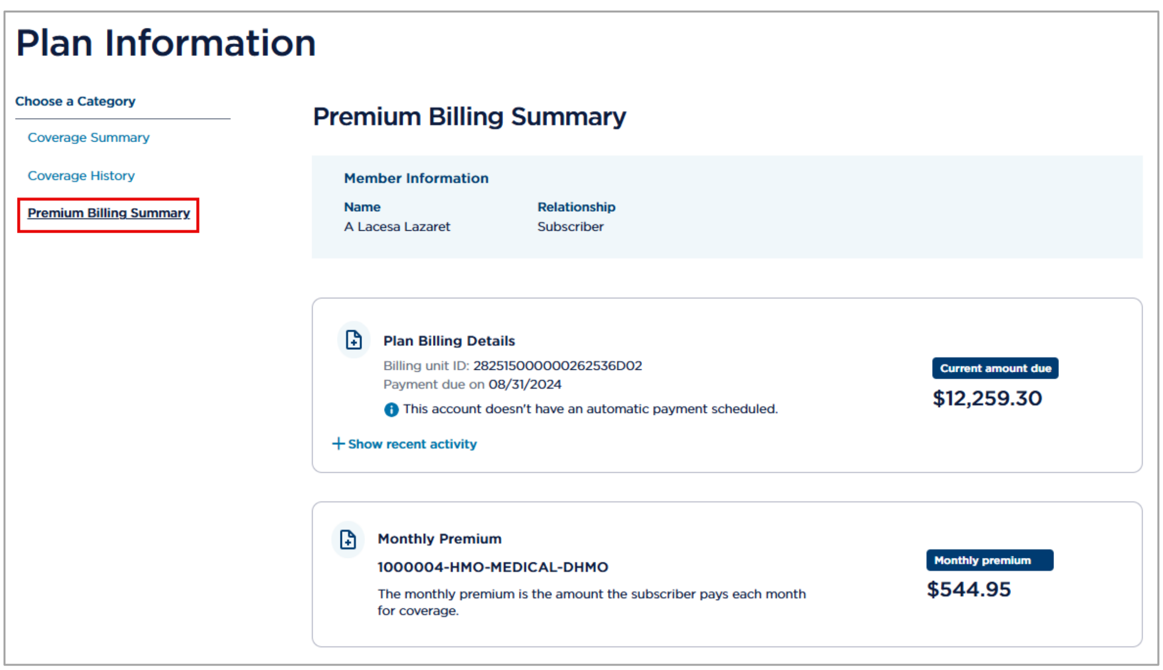
NOTE: Colorado, Georgia, Hawaii, Mid Atlantic, Northwest regions display Agent ID and Firm ID.

- 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 History (1)
Member Information
Name
Wiseman Tdmstacey
Relationship
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
A Lacesa Lazaret
Relationship
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

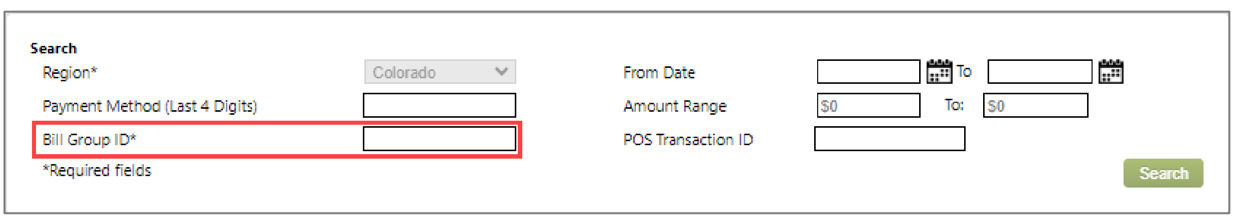
Do your screens look *different*? To provide you with the best online experience, we are updating the look of business.kp.org (formerly account.kp.org). We have started rolling customers onto the new experience gradually and will continue to expand to all groups. The new user experience will simplify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

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



Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status	Action
+	03/25/2020	35470	35470	$1.00	Payment	ACH	Pending	Void
+	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

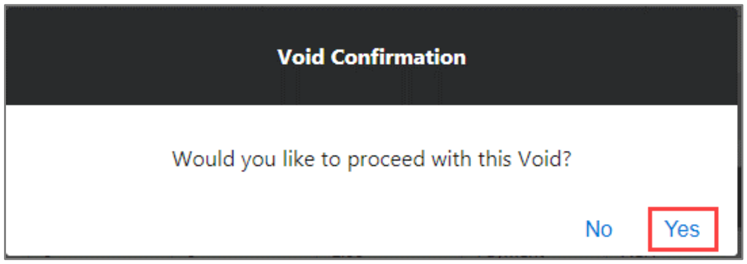
Voiding a Payment

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	Void
⊞	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

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

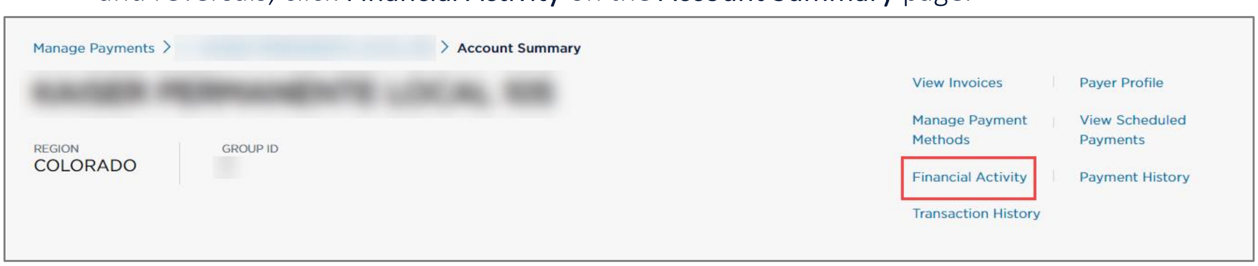


3. A confirmation window will appear, click **Close**.

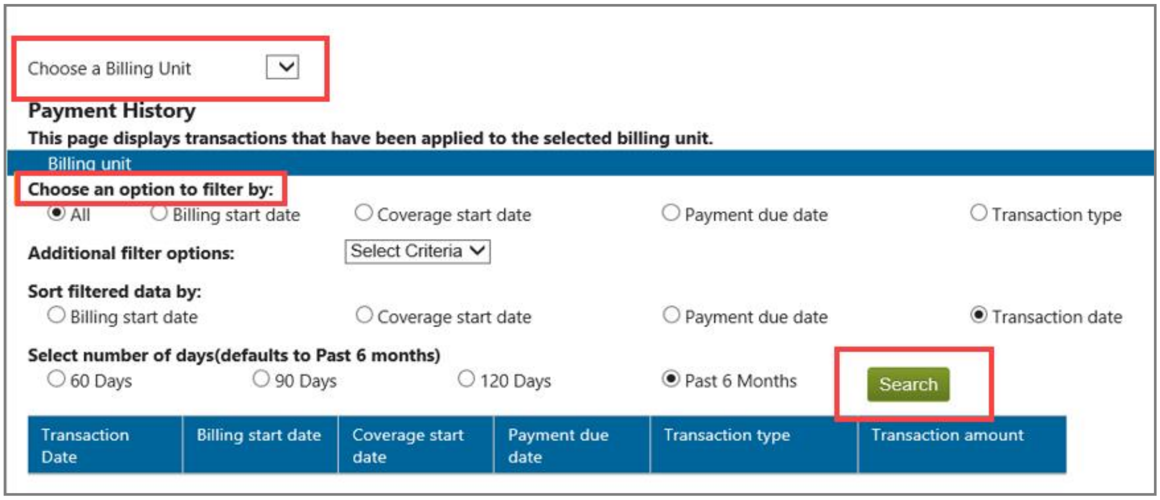
Viewing Financial Activity

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

1. 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.



2. 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.



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!