General Agent Delegation for Business.kp.org

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Overview

General Agencies with a signed business associate agreement with Kaiser Permanente can use the Self-Service tools in the General Agent portal. General Agent administrators (identified by the General Agency) have full access and can manage access and permissions for delegates. Delegates will see all transactions within their firm.

This document describes the steps for a General Agent administrator to create new delegates.

All administrators and delegates must register for a secure account on business.kp.org using their email address. For registration step-by-step instructions, please refer to the document 'General Agent Registration for business.kp.org.

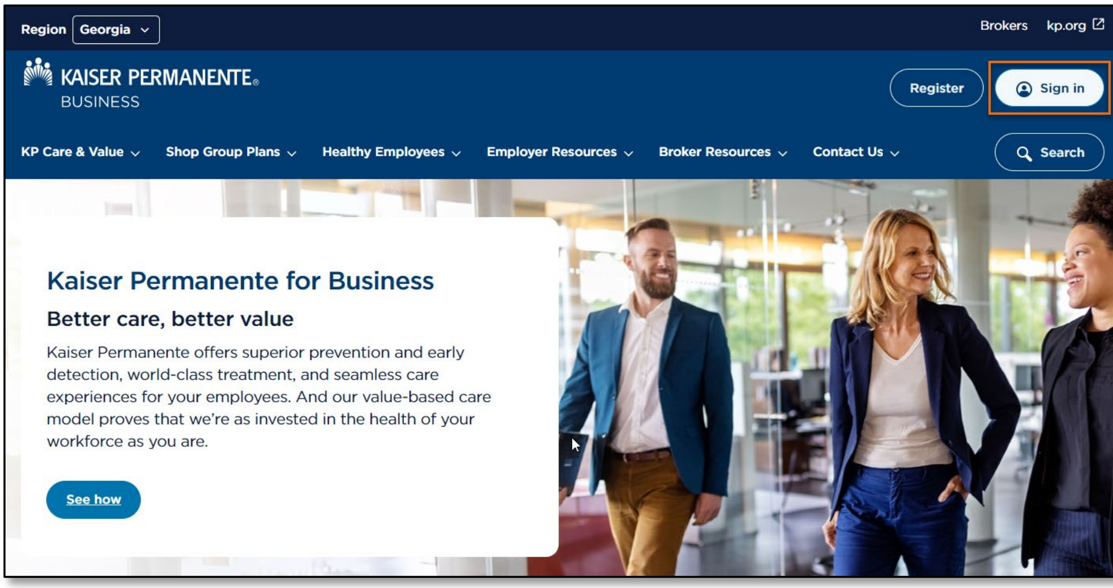
Time to Complete: 20 Min
Audience: Small Group General Agents
Region: MAS, CO, GA, CA

Delegating Access to General Agent Self-Service

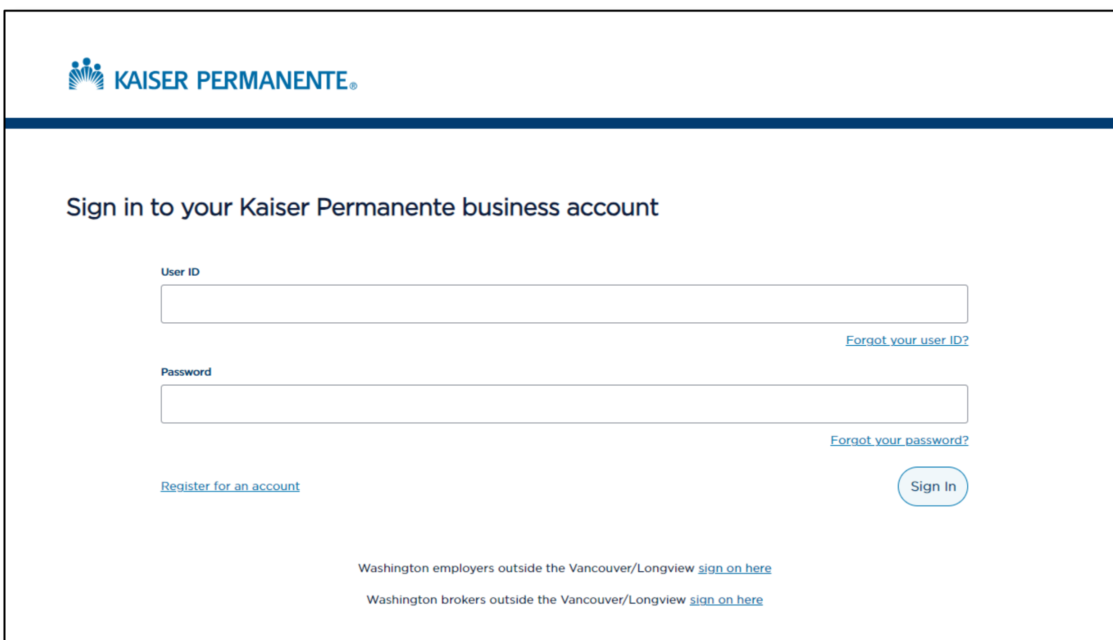
General Agents with administrative access and who have completed registration can delegate access to others by following these steps.

Where to begin

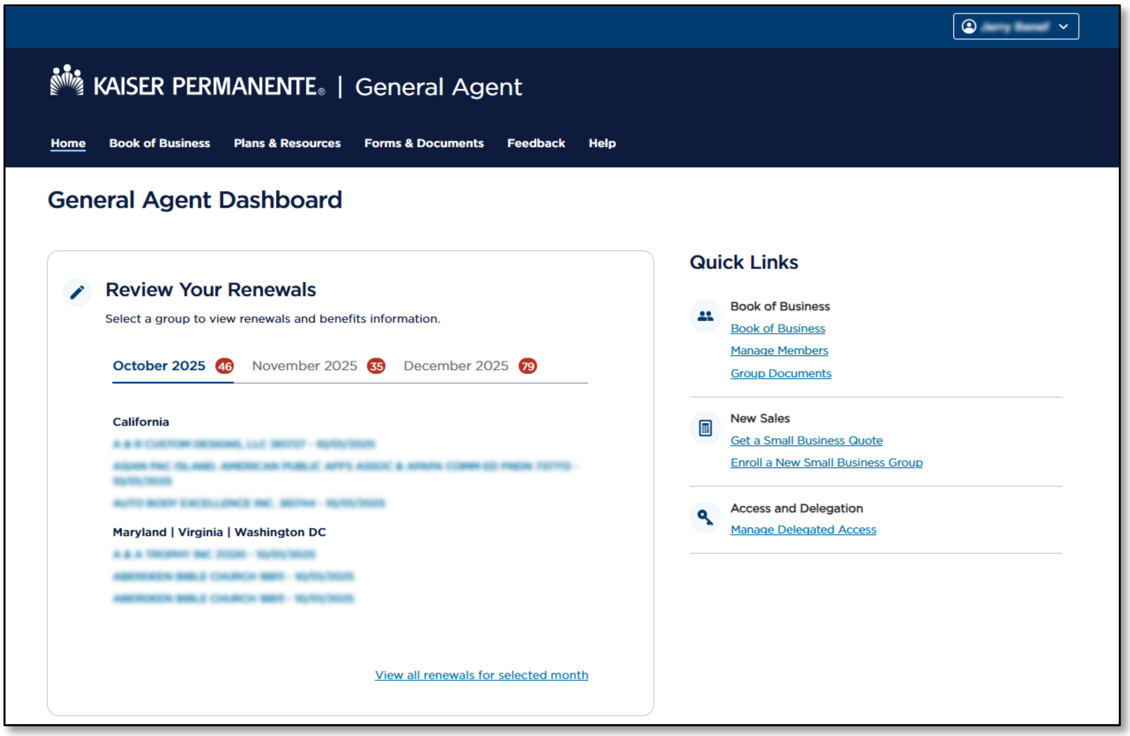
1. Go to business.kp.org.
2. Click **Sign In**.



3. Enter your **User ID** and **Password**.

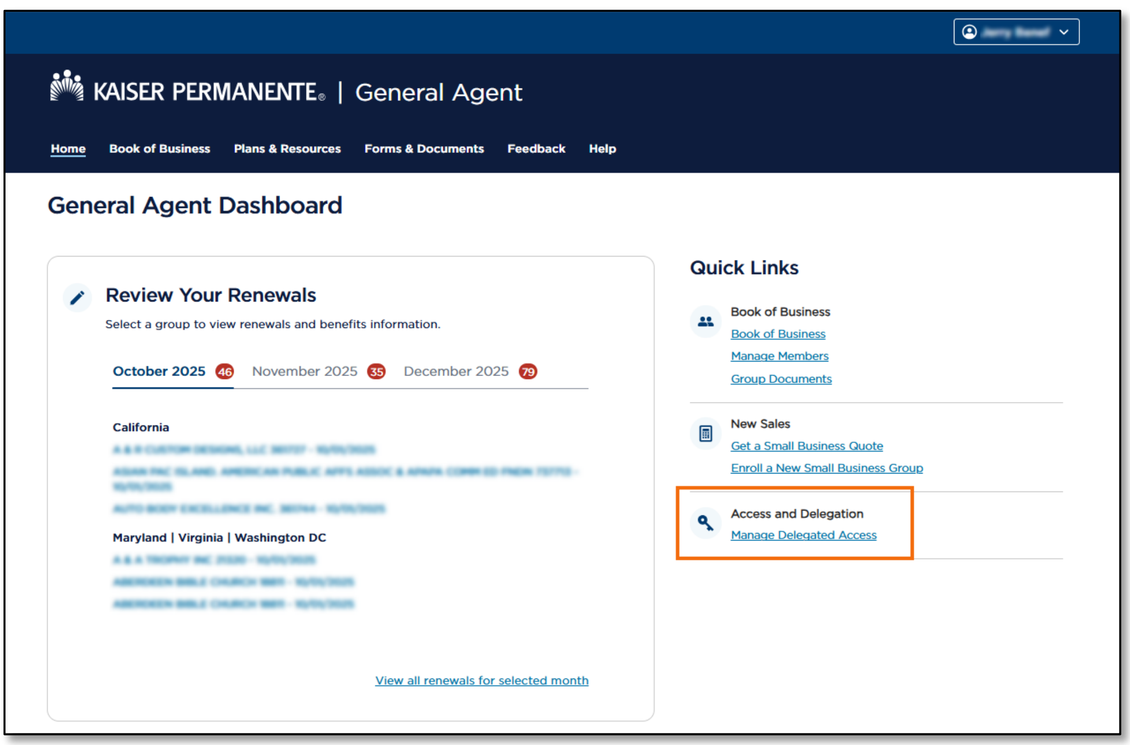


4. Your **Dashboard** page opens.

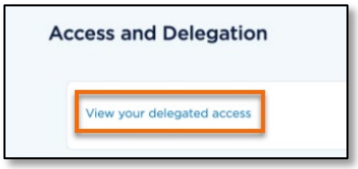


Add Delegate(s)

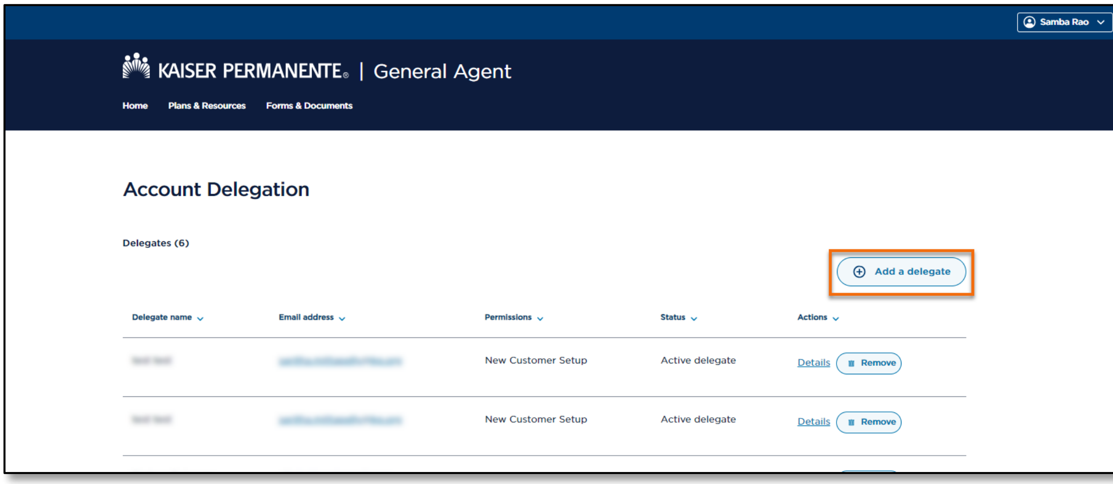
1. Click the **Manage Delegated Access** link.



Note: Delgates do not see an option to manage delegates. They see a link to 'View your delegated access'.



2. In the Account delegation screen, click Add a delegate.



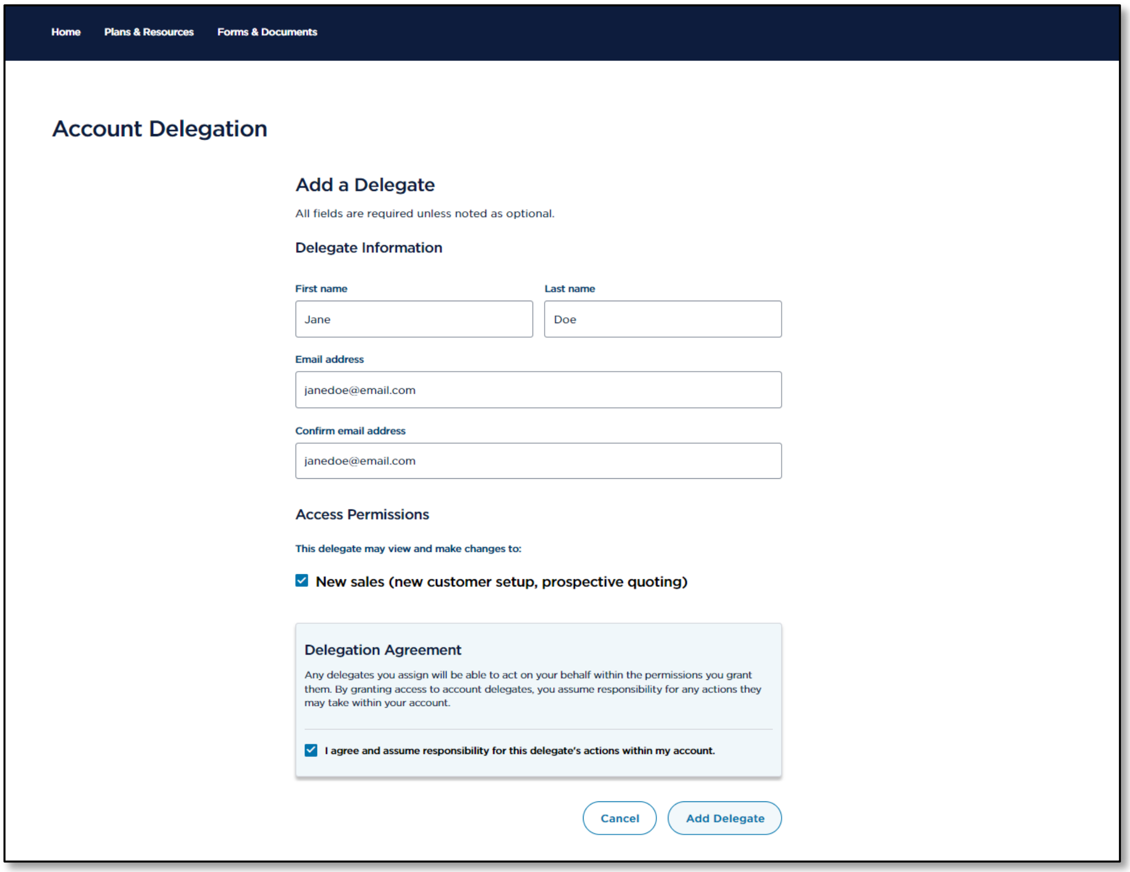
3. Complete the Delegate Information.
4. Select the New sales checkbox to permit the delegate access to quoting and enrollment activities within your firm.

   Note the following:

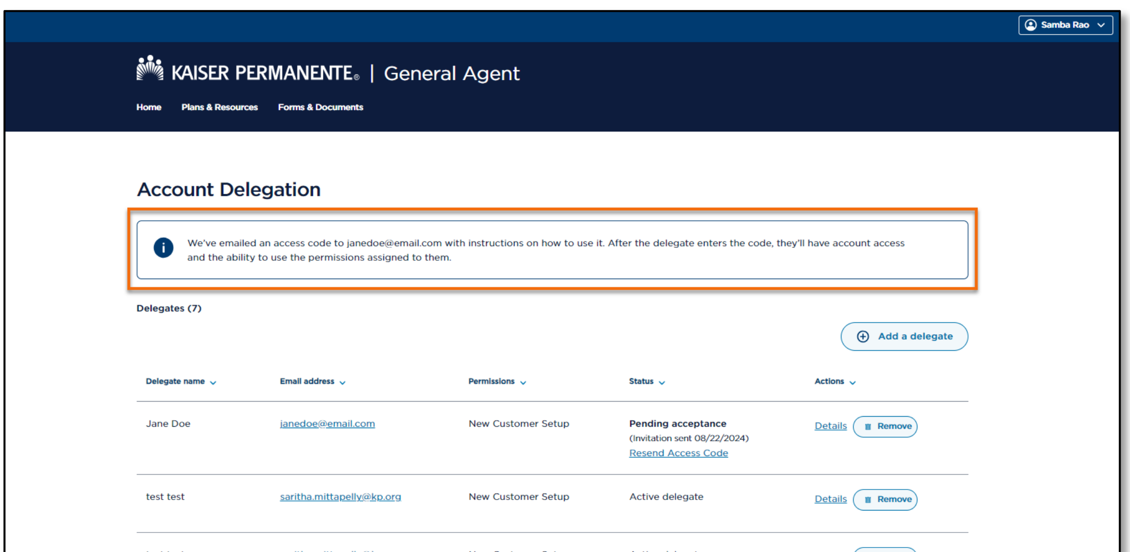
   - Access permissions for 'New sales' is the only permission released at this time. If you do not check this box, the delegate will not receive access to quoting and enrollment features.
   - The California region is enrollment-only (no quoting).

5. Click the Delegation Agreement checkbox if you agree to assume responsibility for the delegate on your account.

6. Click **Add Delegate** at the bottom right.



7. The systems returns you to the 'Account Delegation' screen with a confirmation stating that an email invitation with an access code and instructions was sent to the delegate. The delegate will use the email instructions to complete registration at business.kp.org to obtain the access that was granted to them.

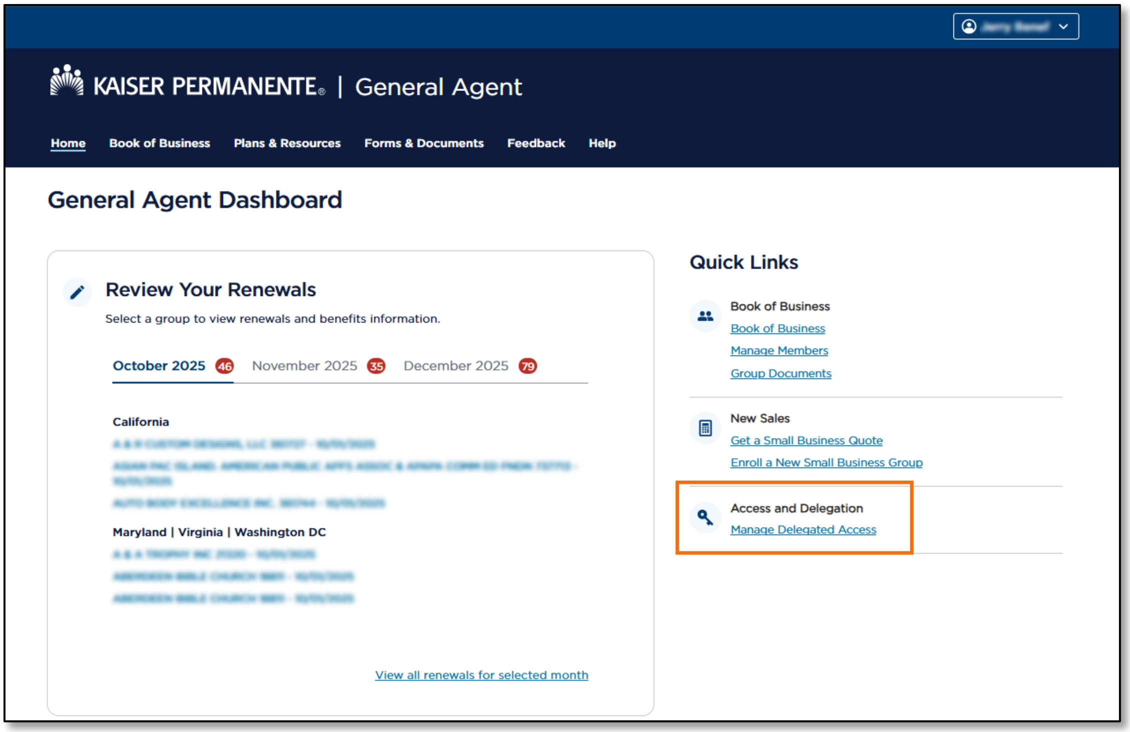


8. Optional: Repeat steps 1-7 to add more delegates.

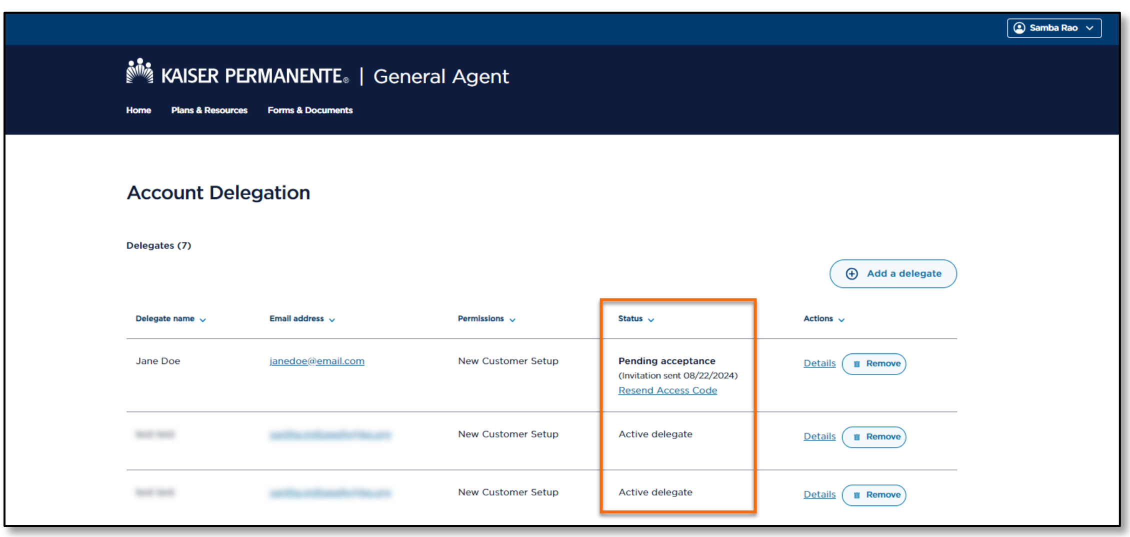
Manage Account Delegation

General Agent administrators can view and manage delegates from the Account Delegation screen.

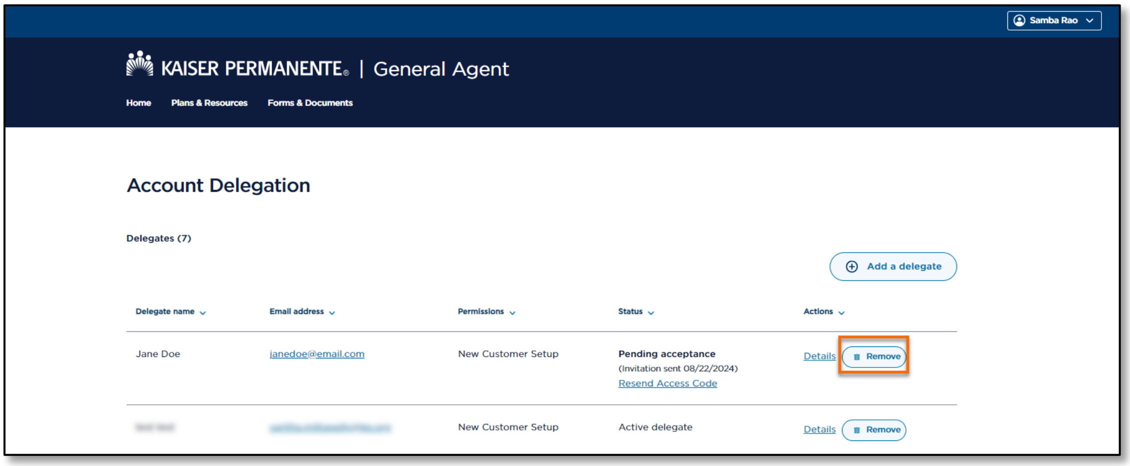
1. Sign in at business.kp.org.
2. From your Dashboard, click the **Manage delegated access** link.



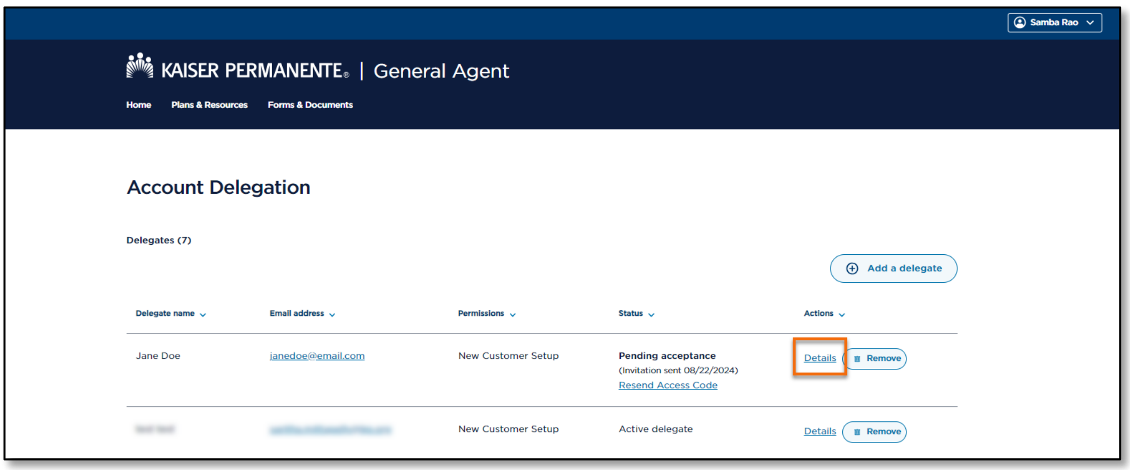
3. Refer to the **Status** column for which delegates are active and pending.
4. For delegates who have a status of 'Pending' you have the option to click **Resend Access Code** to resend the email invitation.



5. Click **Remove** for any particular delegate to remove their account access.

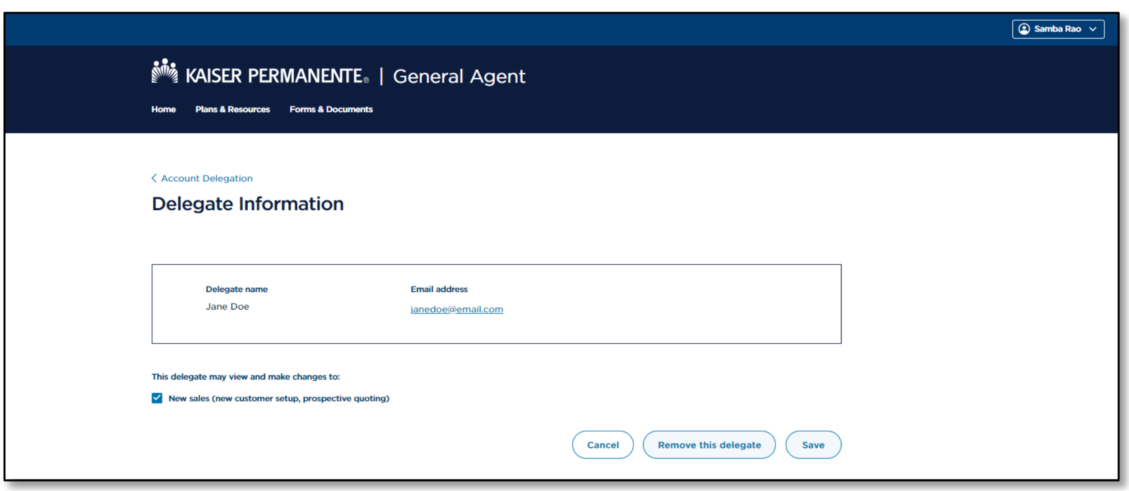


6. Click **Details** to view the delegate information.



5. Here you can change permissions for quoting and enrollment and remove access.

6. Click **Save** after making any changes.



Need Help?

For additional help, please contact the following:

Have general questions about delegation, registration, or self-service?	Employer Broker Services (EBS)	Email: ebs-web-support@kp.org Phone: 855-327-0507
Have specific quoting questions?	Regionals Sales Team	CA: GASBUNEWGROUP@kp.org CO: CO-SBU-Sales-New@kp.org GA: BrokerQuotes.GA@kp.org MAS: MAS-SMALL-GROUP-NEW-BUSINESS@kp.org
Have specific enrollment questions?	Shared Service Team	CA: GASBUNewgroup@kp.org CO, GA, MAS: KPSBUBrokerNewGroups@kp.org