



Generate a Self-Service Quick Quote or Detailed Quote

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Overview

This document describes the steps for generating a small group 'Quick Quote' or a 'Detailed Quote'. These self-service quoting tools are available to General Agents through business.kp.org. *Note:* Screen captures used in this document are for example only; your screens may appear slightly different depending on selections you have made during the quoting process.

Time to Complete: 20 Min

Line of Business: Small Group

Region: GA, CO

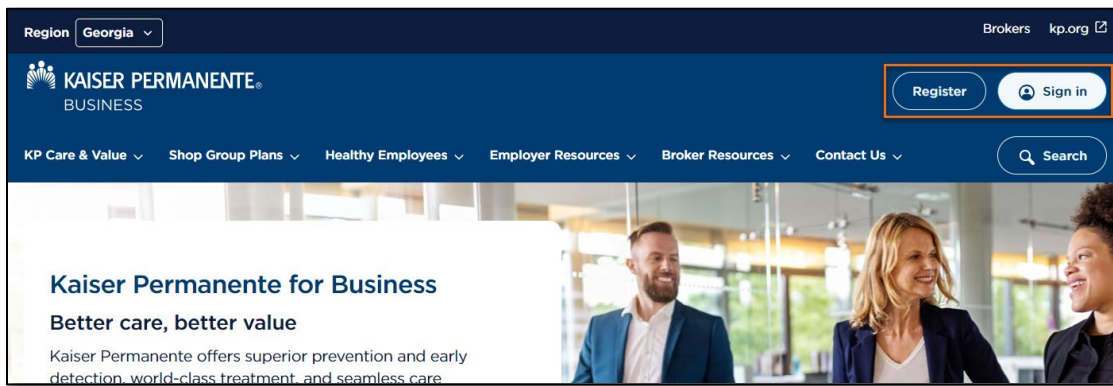
Where to Locate General Agent Self-Service Tools

You can access the General Agent self-service tools from your business.kp.org Dashboard. To get to your Dashboard, follow these steps:

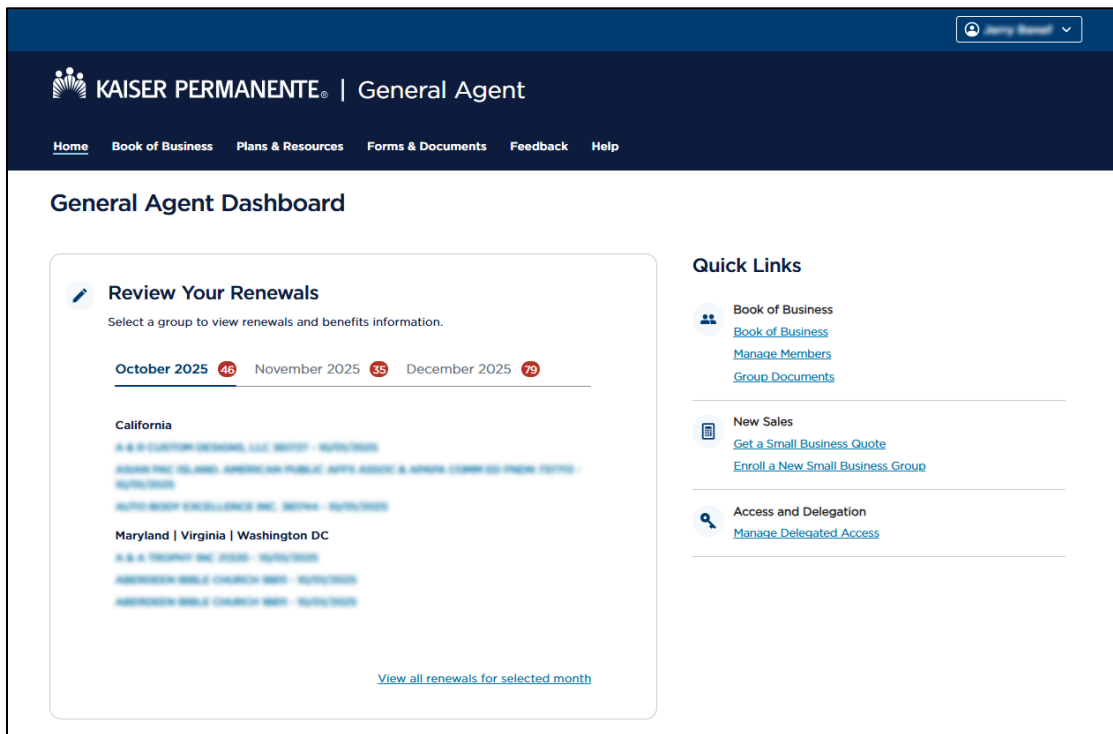
Sign In

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

Note: General Agents receive access to business.kp.org either through a broker or the firm's administrator. If you have received an email with an access code but have not yet registered for a User ID, click 'Register' and follow the steps to create your User ID and password for signing in.



3. Once signed in, your **Dashboard** will appear, customized to the market(s) where you operate. (Image shown is an example.)

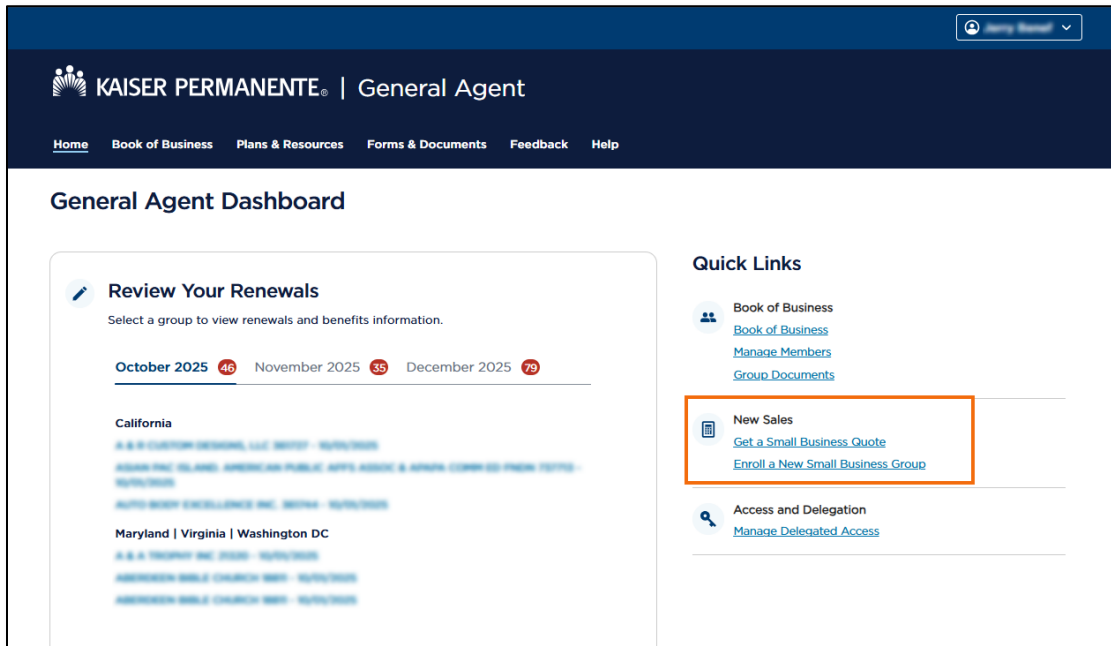


Generate a Quick Quote

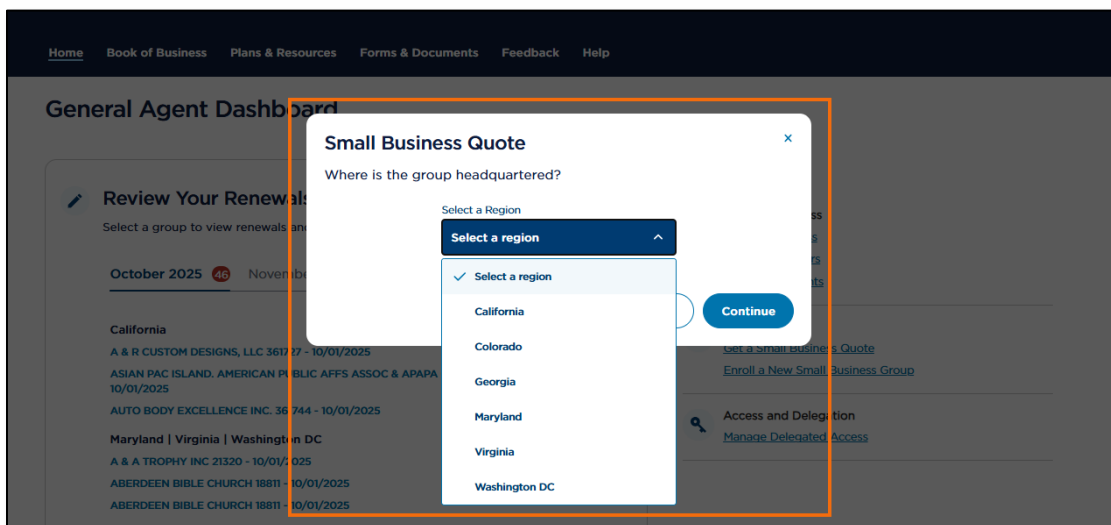
Quick Quote is a fast and simple quoting tool that assumes all members are on the same plan. For a more tailored quote with medical and dental plan assignments, see [Generate a Detailed Quote](#).

Begin a Quick Quote

1. From your Dashboard, click the link to **Get a Small Business Quote**.



2. Select the **Region** where the group you are quoting is located.
Note: The drop down will show all regions your firm is contracted with. This step-by-step guide is specific to Colorado and Georgia.
3. Click **Continue**.



4. The 'Prospect Quote to Enroll' page opens. On this page, you will see:

- a. Buttons to begin a **Quick Quote**, **Detailed Quote** and a **New Group Enrollment**.
- b. **Your Recent Activity**: This is a list of your complete and incomplete self-service quotes and enrollments.
- c. A **Filter by Date Created** drop down* menu to customize what you see in 'Your Recent Activity'.

*Self-Service quotes and enrollments older than 18 months will not display under Your Recent Activity. Contact your KP sales rep for help with quotes and enrollments older than 18 months.

KAISER PERMANENTE

Dashboard **Quote to Enroll Hub** Help Center

Prospect Quote to Enroll

Welcome! Our quote to enroll tool is available to make life a little easier for your firm.

Highlights of tools and features to support your business:

- Rates on demand downloaded in either PDF or Excel, select what is needed to support your unique value proposition
- Comparison tools that make recommending the best employer options based on choice and budget a breeze
- Once you have selected the right suite of options you are a click away from enrolling the group and fast-tracking the enrollment
- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions

You are the expert, and this experience was designed with you in mind.

Get a Quick Quote

Easily view and compare plan benefits and rates. Download a quote that contains all plans, or just the plans that you choose.

Get a Detailed Quote

Want more detail? You can assign plans to each employee and their dependents to receive a more customized quote.

Enroll a New Group

Submit your New Group Enrollments online! Provide your New Group Application and all supporting documentation for enrollment.

Your Recent Activity

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Action
	Enrollment	Received - In Review	000/6692	08/01/2024	09/01/2024	Select
	Enrollment	Received - In Review	000/6685	08/01/2024	09/01/2024	Select
	Enrollment	Received - In Review	000/6618	07/31/2024	08/01/2024	Select Action Enter

Filter by Date Created

Last 30 Days

Last 30 Days

Last 3 Months

Last 6 Months

Last 12 Months

Last 18 Months

5. To begin a new quote, click **Get a Quick Quote**.

KAISER PERMANENTE

Dashboard **Quote to Enroll Hub** Help Center

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- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions

You are the expert, and this experience was designed with you in mind.

Get a Quick Quote

Easily view and compare plan benefits and rates. Download a quote that contains all plans, or just the plans that you choose.

Get a Detailed Quote

Want more detail? You can assign plans to each employee and their dependents to receive a more customized quote.

Enroll a New Group

Submit your New Group Enrollments online! Provide your New Group Application and all supporting documentation for enrollment.

6. Complete the following screens.

Group Details

1. In the 'Group Details' screen, enter basic information about the group and Broker you are preparing the quote for. Complete all required fields(*).

Group Details

Out of Area Employees cannot be quoted online. If you have employees who do not live or work within the service area, please contact Kaiser Permanente for help.

Company Information

* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING
Georgia

*LEGAL BUSINESS NAME

The legal company name is the name as stated on your local business license, quarterly wage and tax report, corporate or partnership documents.

*QUOTE EFFECTIVE DATE

Plans and rates are based on the proposed effective date.

TOTAL NUMBER OF EMPLOYEES (FULL-TIME AND PART-TIME)

*HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

*PHYSICAL ADDRESS ZIP *COUNTY
Rates are based on the group's ZIP Code and county.

*Are any employees eligible for Medicare or on Medicare, either through age or disability?
 Yes No

Broker Contact

*FIRST NAME MIDDLE INITIAL *LAST NAME

*COMPANY ROLE OR TITLE *EMAIL

PHONE FAX

Note the following:

- If you cover multiple regions, enter a **Physical Address Zip** and **County** for the service area that matches your log in. Rates are based on the zip code and county.
 - The 'Broker Contact' section is solely for collecting broker information for the quote. It does not send a copy of the quote to the broker.
 - A Small Group can include 1 to 50 eligible employees, but the Quick Quote and census do not restrict the number of entries.
2. Click **Next** to proceed to the next screen, or click **Cancel** if you wish to discontinue the quote.

Add Employees (Census)

There are two accepted methods for entering census information for each employee: uploading via the census template or manual entry. Both methods are designed to minimize errors.

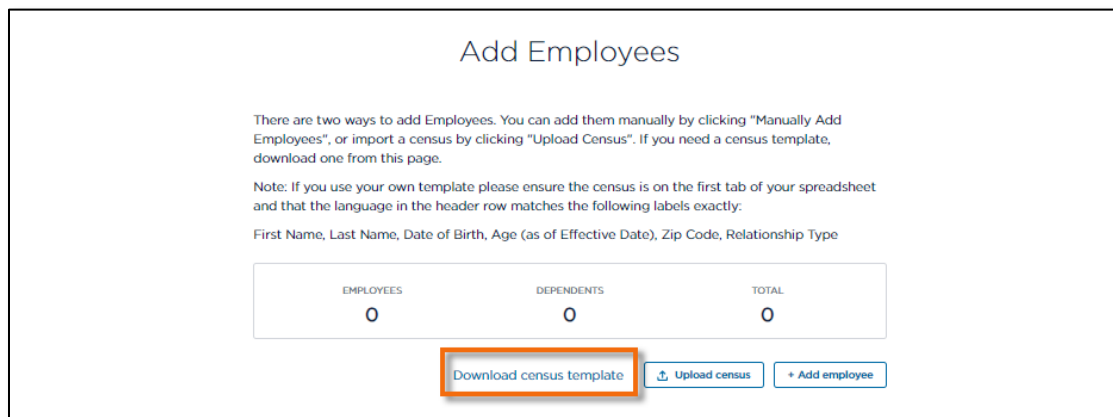
Note: If you use your own census template, ensure that the census is on the first tab of your spreadsheet and that the headers correspond to the census template shown below.

Upload employees and dependents using the Census Template

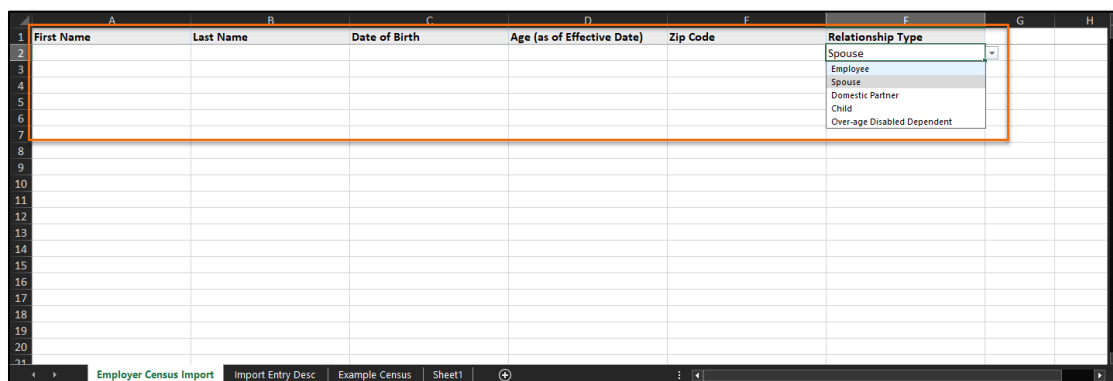
The columns and tabs in the census template are arranged and formatted to map directly to the data fields in the quoting tool.


1. In the 'Add Employees', screen, click **Download census template**.

Note: If you do not have the zip code for each employee for the Quick Quote, use the group's home office zip code. The zip code is required when you proceed to the New Group Enrollment.



2. On your computer, search your Downloads folder for the excel file **sgBrokerAddSubscribersTemplate**.
3. Open the template in Excel.
4. Review the column headers.



 Do not change the column headers or tabs in the census template, as they will map directly to the required fields in the quoting tool when the completed spreadsheet is uploaded.

- Review the *Import Entry Desc* tab at the bottom of the template for how to format your data and to help avoid errors when importing the census to the quoting tool.

Column Field Names	Description	Valid Values
First Name	First Name of Enrollee	Alpha
Last Name	Last Name of Enrollee	Alpha
Date of Birth	Date of Birth of Enrollee	MM/DD/YYYY
Age (as of Effective Date)	Age of Enrollee (as of Effective Date)	Numerical Value (0 - 120)
Zip Code	Zip Code of Enrollee	5 Digit Numerical Value
Relationship Type	Indicates Type of Enrollee Data Being Entered. Select from the dropdown	Employee, Spouse, Domestic Partner, Child, Over-age Disabled Dependent

- Return to the *Employer Census Import* tab to enter employee and dependent information.

First Name	Last Name	Date of Birth	Age (as of Effective Date)	Zip Code	Relationship Type
Jason	Young	2/5/2000		80014	Employee
Brianne	Smith	1/24/1973		80014	Employee
Gordon	Ramsey	3/30/1965		81505	Employee
Maria	Ramsey	1/1/1969		80014	Spouse
David	Hall	4/8/1970		80907	Employee
Melanie	Hall	5/10/1980		80907	Spouse
Michael	Hall	3/6/2017		80907	Child
Mark	Hall	3/6/2017		80907	Child
Melvi	Hall	3/6/2017		80907	Child
Meldo	Hall	3/6/2017		80907	Child
Paul	Lamberson	4/8/1970		81505	Employee
Lee Anne	Lamberson	4/8/1970		81505	Spouse
Lena	Lamberson	3/6/2017		81505	Child
Leo	Lamberson	3/6/2017		81505	Child
Adrian	Lamberson	3/6/2017		81505	Child
Sally	Lamberson	3/6/2017		81505	Child
Mike	Hill	4/8/1970		80014	Employee
Kim	Hill	3/6/2017		80014	Child

Please note the following regarding data entry:

- You may enter either *Date of Birth* or *Age at Effective Date*; however, the subscriber's *Date of Birth* is required when you proceed to the New Group Enrollment.
- Use alpha characters for first and last name.
- You may use the group's home zip code for Quick Quoting; however, the employee zip code is required when you proceed to the New Group Enrollment. If converting a Quick Quote to a Detailed Quote, it is advised to use accurate zip codes for more accurate quoting.
- To enter the *Relationship Type*, use the drop down menu to select a valid option. If you manually enter an invalid option, you will receive an error.
- Employees with in-service-area and out-of-service-area zip codes may be entered in the census.

- After you have entered the census data, save the spreadsheet in a designated folder/location on your PC.

8. Return to the 'Add Employees' page and click **Upload Census** to upload the completed census from your computer.


Add Employees

There are two ways to add Employees. You can add them manually by clicking "Manually Add Employees", or import a census by clicking "Upload Census". If you need a census template, download one from this page.

Note: If you use your own template please ensure the census is on the first tab of your spreadsheet and that the language in the header row matches the following labels exactly:
First Name, Last Name, Date of Birth, Age (as of Effective Date), Zip Code, Relationship Type

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

[Download census template](#) [Upload census](#) [+ Add employee](#)

 At any time throughout the process, you can upload a new census; however, the new census will overwrite all subscriber data.

9. After the data has uploaded, review the page to verify the data and correct any errors in red.

EMPLOYEES **DEPENDENTS** **TOTAL**
6 **17** **23**

[Download census template](#) [Upload new census](#) [+ Add employee](#)

Expand All | Collapse All Download census details | Delete all employees

EMPLOYEE 1
Jason Young 1 Dependent [Delete Employee 1](#)

Details

* FIRST NAME	MIDDLE INITIAL	* LAST NAME	RELATIONSHIP TYPE
Jason		Young	Employee
* DATE OF BIRTH mm/dd/yyyy	* AGE (AS OF EFFECTIVE DATE)	* ZIP CODE	
02/05/2000		80014	
<small>mm/dd/yyyy</small>		<small>Enter 5-digit zip code</small>	

Dependent 1

* DATE OF BIRTH mm/dd/yyyy	AGE (AS OF EFFECTIVE DATE)	* RELATIONSHIP TYPE	Delete dependent 1
06/03/1991		Child	
<small>mm/dd/yyyy</small>			

Non-disabled dependents over the age of 25 at the effective date cannot be enrolled.

[+ Add dependent](#)

EMPLOYEE 2
Brienne Smith 2 Dependents [Delete Employee 2](#)

Details

* FIRST NAME	MIDDLE INITIAL	* LAST NAME	RELATIONSHIP TYPE
Brienne		Smith	Employee

While reviewing the census, note the following:

- Adjust employee information by typing directly into the fields.
- **Delete Employee**, **Add Dependent** and **Delete Dependent** buttons are available for your convenience.

- If there are errors related to the 'Relationship Type' field, the 'Next' button will not display until the errors are fixed.
- Plan rate calculations are based on employee zip code.
- When a subscriber lives outside the service area zip code, a checkbox appears to confirm if the employee works within the service area.

EMPLOYEE 3
Gordon Ramsey 1 Dependent Delete Employee 3

Details

*FIRST NAME: Gordon MIDDLE INITIAL: LAST NAME: Ramsey RELATIONSHIP TYPE: Employee

*DATE OF BIRTH mm/dd/yyyy: 03/30/1965 AGE (AS OF EFFECTIVE DATE): 59 *ZIP CODE: 81505

mm/dd/yyyy Enter 5-digit zip code

DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
 Yes

The employee ZIP Code is invalid or not in our service area. Please ensure that the ZIP Code is correct before proceeding.

- Employees who live and work outside of the service area, are only be eligible for PPO plans; employees in the service area qualify for non-PPO plans only.
- **Colorado:** "KP Select" plans are only available to employees living in qualified zip codes within Colorado Springs.

10. You have the option to **Save Subscribers** (bottom right corner of the page) if you would like to continue adding subscribers later.
11. When you have completed the census, click **Next** to proceed to the [Quote Summary](#) where you can make quote comparisons and evaluate quote details.

*FIRST NAME: Jane MIDDLE INITIAL: LAST NAME: Doe RELATIONSHIP TYPE: Employee

*DATE OF BIRTH: 01/05/1988 AGE (AS OF EFFECTIVE DATE): ZIP CODE: 30016

mm/dd/yyyy Enter 5-digit zip code

+ Add dependent

Save Subscribers + Add employee

Previous Next

Cancel Save for later

Manually add employees

If you prefer to manually enter employees, follow these steps:

1. From the 'Add Employees' page, click **Add Employee**.

Add Employees

On this page, there are two ways to add subscribers. You can add them manually by clicking "Manually add Subscribers" button, or you import a census with your existing list of subscribers by clicking "Upload census." If you need a census template, you can also download one on this page.

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

[Download census template](#) [Upload census](#) **+ Add employee**

2. Enter the employee information.
3. Click **Add Dependent** to add a dependent under the Employee.
4. Click **Add Employee** for each additional employee.

*FIRST NAME: Jane MIDDLE INITIAL: *LAST NAME: Doe RELATIONSHIP TYPE: Employee

*DATE OF BIRTH: 01/05/1988 AGE (AS OF EFFECTIVE DATE): *ZIP CODE: 30016

mm/dd/yyyy Enter 5-digit zip code

+ Add dependent Save Subscribers **+ Add employee**

Previous Next

5. When you have completed the census, click **Next** to proceed to the [Quote Summary](#) where you can make quote comparisons and evaluate quote details.

*FIRST NAME: Jane MIDDLE INITIAL: *LAST NAME: Doe RELATIONSHIP TYPE: Employee

*DATE OF BIRTH: 01/05/1988 AGE (AS OF EFFECTIVE DATE): *ZIP CODE: 30016

mm/dd/yyyy Enter 5-digit zip code

+ Add dependent Save Subscribers **+ Add employee**

Previous **Next**

Cancel Save for later

Quote Summary

The quote is generated once you arrive at the 'Quote Summary' page. Here you can either download all plans or compare plans and rates before presenting them to your group.

Select how to view rate information

1. Click the radio button for either **Member Level Rates (MLR)** or **Composite Rates***. This selection determines how information is presented on the screen (see examples below).

Note: A composite rating option is available only if there are two or more employees.

Note: Each plan indicates the number of eligible employees.

Example with Member Level Rates button selected:

The screenshot shows the 'Quote Summary' page with the 'Member Level Rates' radio button selected. Below the download options, there are 'More Options' for selecting or comparing plans. A search bar and filter options are on the left. The main content area displays a table of plans, with the 'HMO' and 'DHMO' sections highlighted. The table columns are: Plan Name, Total Employee Premium, Total Dependent Premium, and Total Monthly Employer Premium. The number of eligible employees is also listed for each section.

Plan Name	Total Employee Premium	Total Dependent Premium	Total Monthly Employer Premium
HMO			
Number of eligible employees: 6 employees			
<input type="checkbox"/> KP CO Platinum Q/70 RX Copay	\$5,686.79	\$8,668.58	\$14,355.37
<input type="checkbox"/> KP CO Gold Q/20 RX Copay	\$5,024.46	\$7,658.95	\$12,683.41
DHMO			
Number of eligible employees: 6 employees			
<input type="checkbox"/> KP CO Platinum 400/70	\$5,559.92	\$8,170.28	\$13,530.20
<input type="checkbox"/> KP CO Gold 500/25	\$4,847.69	\$7,589.45	\$12,237.14
<input type="checkbox"/> KP CO Gold 1500/25 RX Copay	\$4,640.69	\$7,073.97	\$11,714.66
<input type="checkbox"/> KP CO Gold 2500/70	\$4,490.58	\$6,845.14	\$11,335.72
<input type="checkbox"/> KP CO Silver 2800/45	\$4,050.89	\$6,374.94	\$10,225.83

Example with Composite Rates button selected:

Quote Summary

Your quick quote is now complete and ready to download.

Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2024 have been filed and are under review. Plans will not be sold until reviews are complete. Adult dental rates shown are those that have been filed and are under review. Rates are subject to change.

Download All Plans Quote Choose: Member Level Rates Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To generate a select plans quote, select 1 to 5 plans from the list below and click "Download Select Plans Quote"

To compare plans, select 2-5 plans from the list below and click "Compare Plans"

Download Select Plans Quote (.pdf)
Download Select Plans Quote (.xlsx)
Compare Plans

KP Select plans are only available to employees living in qualified zip codes in Colorado Springs. Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.

*Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan

SEARCH

Search by plan name

PRODUCT TYPE

- PPO
- Colorado Option PPO
- HMO Select
- DHMO Select
- HSA Select
- Virtual Complete Select
- HMO
- DHMO
- DHMO Plus
- POS HMO
- HSA
- Colorado Option
- POS DHMO
- HSA Plus
- Virtual Complete
- POS DHSA

METAL TIERS

- Platinum
- Gold
- Silver
- Bronze

In Service Area

Service Area plans are only available to employees living or working in the service area.

	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
HMO					
Number of eligible employees: 1 employee 2 employees 1 employee 2 employees					
<input type="checkbox"/> KP CO Platinum Q/70 RX Copay	\$1,242.89	\$2,485.78	\$2,299.35	\$5,542.24	\$14,355.37
<input type="checkbox"/> KP CO Gold Q/20 RX Copay	\$1,098.15	\$2,196.26	\$2,031.54	\$5,129.67	\$12,683.41
DHMO					
Number of eligible employees: 1 employee 2 employees 1 employee 2 employees					
<input type="checkbox"/> KP CO Platinum 400/70	\$1,714.5	\$2,542.90	\$2,367.38	\$5,558.65	\$13,530.20
<input type="checkbox"/> KP CO Gold 500/25	\$1,059.49	\$2,118.98	\$1,960.06	\$5,079.55	\$12,237.14
<input type="checkbox"/> KP CO Gold 1500/25 RX Copay	\$1,014.26	\$2,028.52	\$1,876.38	\$2,890.64	\$11,714.66
<input type="checkbox"/> KP CO Gold 2500/70	\$981.45	\$1,962.90	\$1,815.68	\$2,797.15	\$11,335.72
<input type="checkbox"/> KP CO Silver 2800/45	\$885.35	\$1,770.70	\$1,657.90	\$2,525.25	\$10,225.83

2. Plans are grouped on the page according to 'In Service Area', 'Out of Area' and 'Colorado Springs' (Colorado only), and each plan displays the number of eligible employees, for that specific plan. See examples below.

In Service Area plans are only available to employees who live or work in the service area and qualify for non-PPO plans.

In Service Area			
Service Area plans are only available to employees living or working in the service area.			
HMO		Total Employee Premium	Total Dependent Premium
			*Total Monthly Employer Premium
Number of eligible employees:			6 employees
<input type="checkbox"/>	KP CO Platinum 0/10 RX Copay	See Rate Details	\$5,686.79
			\$8,668.58
			\$14,355.37
<input type="checkbox"/>	KP CO Gold 0/20 RX Copay	See Rate Details	\$5,024.46
			\$7,658.95
			\$12,683.41
DHMO		Total Employee Premium	Total Dependent Premium
			*Total Monthly Employer Premium
Number of eligible employees:			6 employees
<input type="checkbox"/>	KP CO Platinum 400/10	See Rate Details	\$5,359.92
			\$8,170.28
			\$13,530.20
<input type="checkbox"/>	KP CO Gold 500/25	See Rate Details	\$4,847.69
			\$7,389.45
			\$12,237.14
<input type="checkbox"/>	KP CO Gold 1500/25 RX Copay	See Rate Details	\$4,640.69
			\$7,073.97
			\$11,714.66
<input type="checkbox"/>	KP CO Gold 2500/10	See Rate Details	\$4,490.58
			\$6,845.14
			\$11,335.72
<input type="checkbox"/>	KP CO Silver 2800/45	See Rate Details	\$4,050.89
			\$6,174.94
			\$10,225.83
<input type="checkbox"/>	KP CO Silver 4000/50 RX Copay	See Rate Details	\$3,969.80
			\$6,051.31
			\$10,021.11
<input type="checkbox"/>	KP CO Silver 5000/10	See Rate Details	\$3,688.27
			\$5,622.12
			\$9,310.39
<input type="checkbox"/>	KP CO Bronze 7000/60 RX Copay	See Rate Details	\$3,580.00
			\$5,457.08
			\$9,037.08
DHMO Plus		Total Employee Premium	Total Dependent Premium
			*Total Monthly Employer Premium
Number of eligible employees:			6 employees
<input type="checkbox"/>	KP CO Platinum DHMO Plus 250/20	See Rate Details	\$5,549.78
			\$8,459.74
			\$14,009.52

Colorado Springs plans (CO only) are only available to employees with qualified zip codes in Colorado Springs.

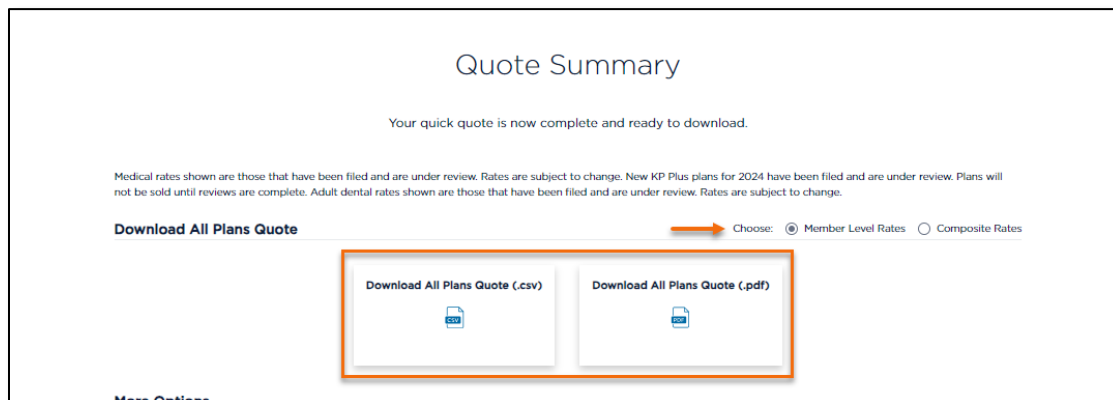
Colorado Springs				
"KP Select" plans are only available to employees living in qualified zip codes in Colorado Springs.				
HMO Select		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
Number of eligible employees:			2 employees	
<input type="checkbox"/> KP Select CO Platinum 0/10 RX Copay	See Rate Details	\$1,937.34	\$2,716.37	\$4,653.71
<input type="checkbox"/> KP Select CO Gold 0/20 RX Copay	See Rate Details	\$1,711.82	\$2,400.13	\$4,111.95
DHMO Select		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
Number of eligible employees:			2 employees	
<input type="checkbox"/> KP Select CO Platinum 400/10	See Rate Details	\$1,826.28	\$2,560.64	\$4,386.92
<input type="checkbox"/> KP Select CO Gold 500/25	See Rate Details	\$1,651.66	\$2,315.83	\$3,967.49
<input type="checkbox"/> KP Select CO Gold 1500/25 RX Copay	See Rate Details	\$1,581.14	\$2,216.92	\$3,798.06
<input type="checkbox"/> KP Select CO Gold 2500/10	See Rate Details	\$1,529.84	\$2,144.99	\$3,674.83
<input type="checkbox"/> KP Select CO Silver 2800/45	See Rate Details	\$1,380.12	\$1,935.09	\$3,315.21
<input type="checkbox"/> KP Select CO Silver 4000/50 RX Copay	See Rate Details	\$1,352.60	\$1,896.50	\$3,249.10
<input type="checkbox"/> KP Select CO Silver 5000/10	See Rate Details	\$1,256.62	\$1,761.90	\$3,018.52
<input type="checkbox"/> KP Select CO Bronze 7000/60 RX Copay	See Rate Details	\$1,219.66	\$1,710.09	\$2,929.75
HSA Select		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
Number of eligible employees:			2 employees	
<input type="checkbox"/> KP Select CO Gold 1750/30/HSA	See Rate Details	\$1,586.80	\$2,224.89	\$3,811.69

Out of Area plans are for employees who live and work outside the service area, and only qualify for PPO plans.

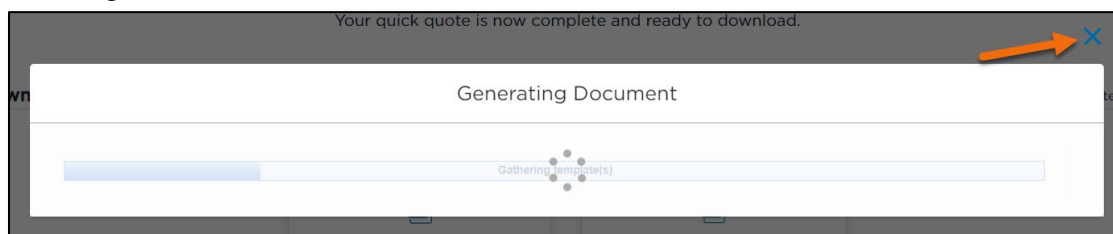
Out of Area				
Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.				
PPO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
Number of eligible employees:				1 employee
<input type="checkbox"/>	KP CO Gold PPO 2000/35 RX Copay See Rate Details	\$1,265.61	\$2,626.08	\$3,891.69
<input type="checkbox"/>	KP CO Silver PPO 3500/50 RX Copay See Rate Details	\$1,135.85	\$2,356.82	\$3,492.67
<input type="checkbox"/>	KP CO Bronze PPO 7000/60 RX Copay See Rate Details	\$1,056.94	\$2,193.10	\$3,250.04
<input type="checkbox"/>	KP CO Silver PPO HDHP 5500/40% See Rate Details	\$1,119.36	\$2,322.60	\$3,441.96
Colorado Option PPO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
Number of eligible employees:				1 employee
<input type="checkbox"/>	KP Colorado Option Gold PPO See Rate Details	\$1,274.12	\$2,643.71	\$3,917.83
<input type="checkbox"/>	KP Colorado Option Silver PPO See Rate Details	\$1,127.01	\$2,338.47	\$3,465.48
<input type="checkbox"/>	KP Colorado Option Bronze PPO See Rate Details	\$1,063.92	\$2,207.58	\$3,271.50

Download the 'All Plans' Quote

1. Choose between **Member Level Rates** or **Composite Rates** for the 'All Plans' Quote download.
2. Click the relevant button to download the document as a CSV or PDF.



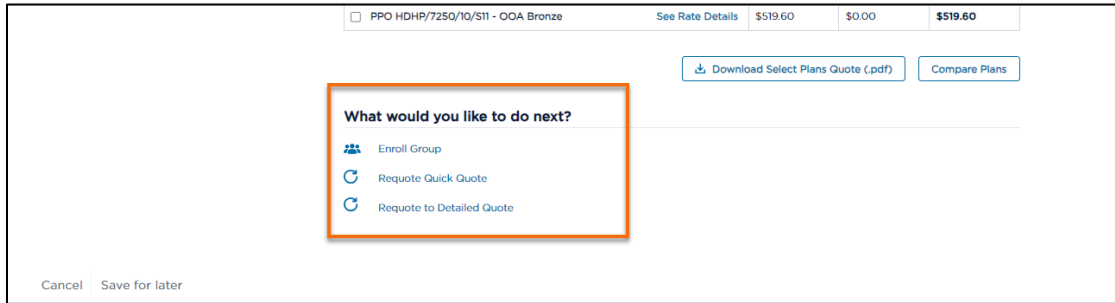
3. Once the 'All Plans' document has downloaded to your computer, click the "X" in the upper right corner of the dialogue box to close it out.



4. Open the PDF or CSV document from your computer to review the census, plans and rates.

TIP Links for *Plan Guide Brochure* and *Member Level Age-Band Rate Grids* can be found inside the document.

5. If any issues are found in the All Plans document, scroll to the bottom of the 'Quote Summary' screen and select **Requote Quick Quote**. Refer to the [Requote](#) section later in this document.



Compare Select Plans and Rates

From the 'Quote Summary' screen, you can compare 2 to 3 plans at a time.

1. If desired, begin by using the **Search** field or **Filters** to locate specific plans.
2. Click the checkboxes for 2 to 3 plans you'd like to compare.
3. Click **Compare Plans**.

More Options

To generate a select plans quote, select 1 to 5 plans from the list below and click "Download Select Plans Quote"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Download Select Plans Quote (.pdf)
Download Select Plans Quote (.xlsx)
Compare Plans 3

KP Select plans are only available to employees living in qualified zip codes in Colorado Springs. Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.

*Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan

SEARCH

Search by plan name

PRODUCT TYPE

- PPO
- Colorado Option PPO
- HMO
- DHMO
- DHMO Plus
- POS HMO
- HSA
- Colorado Option
- POS DHMO
- HSA Plus
- Virtual Complete
- POS DPHSA
- HMO Select
- DHMO Select
- HSA Select
- Virtual Complete Select

METAL TIERS

- Platinum
- Gold
- Silver
- Bronze

NETWORK

- Standard
- Select

Apply Filters

Remove all filters

In Service Area

Service Area plans are only available to employees living or working in the service area.

POS HMO	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>					
<input checked="" type="checkbox"/> KP CO Platinum 3T POS 0/10	1 employee	2 employees	1 employee	2 employees	\$11,763.12

HMO	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>					
<input checked="" type="checkbox"/> KP CO Gold 0/20 RX Copay	1 employee	2 employees	1 employee	2 employees	\$8,644.46
<input type="checkbox"/> KP CO Platinum 0/10 RX Copay	\$779.60	\$1,559.20	\$1,442.26	\$2,221.86	\$9,783.99

DHMO Plus	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>					
<input type="checkbox"/> KP CO Silver DHMO Plus 3500/45	\$561.90	\$1,123.80	\$1,039.52	\$1,601.42	\$7,051.81
<input type="checkbox"/> KP CO Gold DHMO Plus 2000/40	\$624.17	\$1,248.34	\$1,154.71	\$1,778.88	\$7,833.39
<input type="checkbox"/> KP CO Gold DHMO Plus 1250/35	\$658.00	\$1,316.00	\$1,217.30	\$1,875.30	\$8,257.96
<input type="checkbox"/> KP CO Platinum DHMO Plus 250/20	\$760.82	\$1,521.64	\$1,407.52	\$2,168.34	\$9,548.27

HSA Plus	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>					
<input checked="" type="checkbox"/> KP CO Silver HSA Plus 3500/30%	\$560.65	\$1,121.30	\$1,037.20	\$1,597.85	\$7,036.20

- The 'Plan Comparison' page opens. Review the information.
- Scroll to the bottom and click **Go back to Plans and Rates**.

Plan Comparison

Plan Name *Monthly Premium	KP CO Silver HSA Plus 3500/30%		KP CO Gold 0/20 RX Copay \$8,644.46/mo	KP CO Platinum 3T POS 0/10 \$11,763.12/mo		
	Kaiser Permanente Providers	PPO Providers		Kaiser Permanente Providers	PPO Providers	Out-Of-Network Providers
Deductible	\$3,500 / \$7,000	\$3,500 / \$7,000	\$0 / \$0	\$0 / \$0	\$500 / \$1,000	\$2,000 / \$4,000
Out Of Pocket Max	\$7,500 / \$15,000	\$7,500 / \$15,000	\$7,500 / \$15,000	\$2,500 / \$5,000	\$5,500 / \$11,000	\$10,000 / \$20,000
Primary Care Visits	50% After Deductible	50% After Deductible	\$20	\$10	\$35	50% After Deductible
Emergency Visits	50% After Deductible	50% After Deductible	\$750	\$400	\$400	\$400
Inpatient Hospitalization	50% After Deductible	Not Covered	\$750 Per Day, Max \$3,000 Per Admit	10%	25% After Deductible	50% After Deductible
Prescriptions						
Generic	\$10 After Deductible	50% After Deductible	\$15	\$10	\$25	
Brand	\$30 After Deductible	50% After Deductible	\$70	\$40	\$60	
Non-Preferred	50% After Deductible	50% After Deductible	\$350	10%	25% After Deductible	
Specialty	50% After Deductible	50% After Deductible	\$400	10%	25% After Deductible	

*Total Monthly Premium assuming all employees + dependents are enrolled on the plan

[Go back to Plans and Rates](#)

- Repeat steps 1-5 as needed to identify a suitable recommendation for the group.

View and Download Rate Details

When viewing the 'Quote Summary' by **Member Level Rates**, you have the option to review and download rate details for plan-eligible employees.

1. Click the **See Rate Details** link for any plan.

More Options

To generate a select plans quote, select 1 to 5 plans from the list below and click "Download Select Plans Quote"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

SEARCH

Search by plan name

PRODUCT TYPE

- PPO
- Colorado Option PPO
- HMO
- DHMO
- DHMO Plus
- POS HMO
- HSA
- Colorado Option
- POS DHMO
- HSA Plus
- Virtual Complete
- POS DPHSA
- HMO Select
- DHMO Select
- HSA Select
- Virtual Complete Select

In Service Area

Service Area plans are only available to employees living or working in the service area.

HMO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
5 employees			
<input type="checkbox"/> KP CO Platinum 0/10 RX Copay	\$4,622.23	\$5,161.76	\$9,783.99
<input type="checkbox"/> KP CO Gold 0/20 RX Copay	\$4,083.89	\$4,560.57	\$8,644.46

DHMO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
5 employees			
<input type="checkbox"/> KP CO Platinum 400/10	\$4,356.55	\$4,865.04	\$9,221.59

2. Review the 'Rate Details'.
3. Click **Download Rate Details** to save as PDF or Excel, if desired.

KP CO Platinum 0/10 RX Copay

Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2024 have been filed and are under review. Plans will not be sold until reviews are complete. Adult dental rates shown are those that have been filed and are under review. Rates are subject to change.

[Download Rate Details \(.pdf\)](#) [Download Rate Details \(.xlsx\)](#)

Rate Details for Plan Eligible Employees

TOTAL EMPLOYEE PREMIUM	TOTAL DEPENDENT PREMIUM	TOTAL MONTHLY EMPLOYER PREMIUM
\$4,622.23	\$5,161.76	\$9,783.99

*Census reflects employees eligible for plan coverage based on employee live / work ZIP Code.

EMPLOYEE	AGE	RELATIONSHIP	MEMBER RATE	TOTAL FAMILY PREMIUM	ZIP CODE
1. Jason Young	24	Employee	\$498.62	\$498.62	80014
2. Brienne Smith	51	Employee	\$929.95	\$2,129.12	80014
Dependent 1	55	Spouse	\$1,064.56		

4. After reviewing the rates, go to the bottom of the page and click **Return to Quote Summary**.

5. David King	54	Employee	\$1,064.56	\$2,129.12	80014
Dependent 1	54	Spouse	\$1,064.56		

[Return to Quote Summary](#)

Cancel Save for later

5. Repeat steps 1-3 to view additional rate details.

Download Select Plans

After locating the best plans options to present to your group, you can download a 'Select Plans' Quote for a more detailed plan comparison.

1. Check the box for 1-5 plans you want to include in the 'Select Plans' Quote.
2. Click **Download Select Plans Quote** (PDF or Excel).

More Options

To generate a select plans quote, select 1 to 5 plans from the list below and click "Download Select Plans Quote"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Download Select Plans Quote (.pdf) Download Select Plans Quote (.xlsx) Compare Plans

*"KP Select" plans are only available to employees living in qualified zip codes in Colorado Springs. Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.

*Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan

SEARCH

Search by plan name

PRODUCT TYPE

- Virtual Complete Select
- HSA Select
- DHMO Select
- HMO Select
- POS DPHSA
- Virtual Complete
- HSA Plus
- POS DHMO
- Colorado Option
- HSA
- POS HMO
- DHMO Plus
- DHMO
- HMO
- Colorado Option PPO
- PPO

METAL TIERS

- Platinum
- Gold
- Silver
- Bronze

NETWORK

- Standard
- Select

Apply Filters

Remove all filters

In Service Area

Service Area plans are only available to employees living or working in the service area.

HMO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
5 employees			
<input checked="" type="checkbox"/> KP CO Platinum Q/10 RX Copay See Rate Details	\$4,622.23	\$5,361.76	\$9,783.99
<input type="checkbox"/> KP CO Gold Q/20 RX Copay See Rate Details	\$4,083.89	\$4,560.57	\$8,644.46

DHMO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
5 employees			
<input type="checkbox"/> KP CO Platinum 400/10 See Rate Details	\$4,356.55	\$4,865.04	\$9,221.59
<input type="checkbox"/> KP CO Gold 500/25 See Rate Details	\$3,940.21	\$4,400.09	\$8,340.30
<input checked="" type="checkbox"/> KP CO Gold 500/25 NEA See Rate Details	\$3,940.21	\$4,400.09	\$8,340.30
<input type="checkbox"/> KP CO Gold 1500/25 RX Copay See Rate Details	\$3,771.96	\$4,212.24	\$7,984.20
<input type="checkbox"/> KP CO Gold 2500/10 See Rate Details	\$3,649.95	\$4,075.98	\$7,725.93
<input type="checkbox"/> KP CO Silver 2800/45 See Rate Details	\$3,292.57	\$3,676.91	\$6,969.48
<input type="checkbox"/> KP CO Silver 4000/50 RX Copay See Rate Details	\$3,226.66	\$3,603.29	\$6,829.95
<input type="checkbox"/> KP CO Silver 5000/10 See Rate Details	\$2,997.83	\$3,347.72	\$6,345.55
<input type="checkbox"/> KP CO Silver 5000/10 NEA See Rate Details	\$2,997.83	\$3,347.72	\$6,345.55
<input type="checkbox"/> KP CO Bronze 7000/60 RX Copay See Rate Details	\$2,909.83	\$3,249.45	\$6,159.28

DHMO Plus	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
5 employees			
<input type="checkbox"/> KP CO Platinum DHMO Plus 250/20 See Rate Details	\$4,510.87	\$5,037.40	\$9,548.27

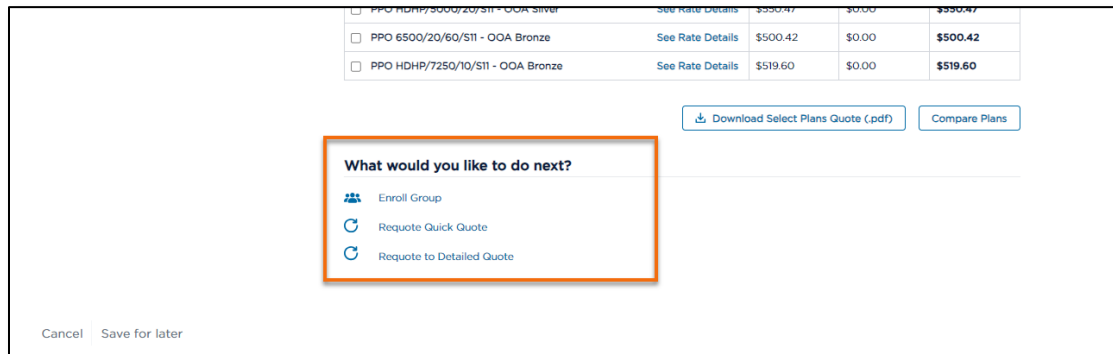
3. Open the 'Select Plans' PDF from your computer to review.

TIP Links for *Plan Guide Brochure*, *Member Level Age-Band Rate Grids*, and *Summary of Benefits* can be found inside the document.

Requote or Enroll the Group

At the bottom of the 'Quote Summary' page, you will notice options for the following:

4. **Enroll Group**- Click here to convert the quote to an enrollment. Refer to the job aid '02-Kaiser Permanente General Agent Step-By-Step Guide- SG Self-Service New Group Enrollment'
1. **Requote Quick Quote**- Refer to [Requote](#) section later in this document.
2. **Requote to Detailed Quote**- Refer to [Convert a Quick Quote to a Detailed Quote](#) section below.






The screenshot displays a quote summary page with a table of plans and a dialog box. The table lists three plans with their respective rates. Below the table are buttons for 'Download Select Plans Quote (.pdf)' and 'Compare Plans'. A dialog box titled 'What would you like to do next?' is open, offering three options: 'Enroll Group', 'Requote Quick Quote', and 'Requote to Detailed Quote'. The 'Enroll Group' option is highlighted with an orange border. At the bottom left of the page, there are 'Cancel' and 'Save for later' buttons.

	See Rate Details	\$530.47	\$0.00	\$530.47
<input type="checkbox"/> PPO HDHP/3000/20/S11 - OOA Silver	See Rate Details	\$500.42	\$0.00	\$500.42
<input type="checkbox"/> PPO 6500/20/60/S11 - OOA Bronze	See Rate Details	\$519.60	\$0.00	\$519.60

Download Select Plans Quote (.pdf) Compare Plans

What would you like to do next?

-  Enroll Group
-  Requote Quick Quote
-  Requote to Detailed Quote

Cancel Save for later

Generate a Detailed Quote

Detailed Quote offers a high level of accuracy by tailoring medical plans to individual members. If you're looking for a fast and simple quoting option, please see [Generate a Quick Quote](#).

Begin a Detailed Quote

There are two ways to begin a Detailed Quote.

1. If you have already completed a Quick Quote for the group, save time by reusing some of the group information you already entered. Follow the steps in the section titled [Convert a Quick Quote to a Detailed Quote](#).
2. Or, if you have not completed a Quick Quote for the group, click **Get a Detailed Quote** on the 'Prospect Quote to Enroll' page (refer to [Where to Locate the General Agent Self-Service Tools](#) for help).

KAISER PERMANENTE | Broker

Dashboard **Quote to Enroll Hub** Quoting and Enrollment Help Center

Prospect Quote to Enroll

Welcome! Our quote to enroll tool is available to make life a little easier for your firm.

Highlights of tools and features to support your business:

- Rates on demand downloaded in either PDF or Excel, select what is needed to support your unique value proposition
- Comparison tools that make recommending the best employer options based on choice and budget a breeze
- Once you have selected the right suite of options you are a click away from enrolling the group and fast-tracking the enrollment
- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions

You are the expert, and this experience was designed with you in mind.

Get a Quick Quote

Easily view and compare plan benefits and rates. Download a quote that contains all plans, or just the plans that you choose.

Get a Detailed Quote

Want more detail? You can assign plans to each employee and their dependents to receive a more customized quote.

Enroll a New Group

Submit your New Group Enrollments online! Provide your New Group Application and all supporting documentation for enrollment.

Your Recent Activity

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
CPQ-STG-23864 Testing Bug	Enrollment	Received - In Review	00029619	10/17/2023	02/01/2024	Select Action <input type="button" value="Enter"/>
CPQ-23807-STG Test	Enrollment	Received - In Review	00029618	10/17/2023	02/01/2024	Select Action <input type="button" value="Enter"/>

Group Details

Use the 'Group Details' screen to enter basic information about the group and broker you are preparing the quote for. Complete all required fields(*).

1. Enter the information for the group you are preparing the quote for.

Note: Rates are based on the zip code and county that you enter for the group.

1. Enter the Broker Contact information.
2. Click **Next** to continue to the 'Add Employees' screen, or click **Cancel** if you do not wish to proceed.

Group Details

Out of Area Employees cannot be quoted online. If you have employees who do not live or work within the service area, please contact Kaiser Permanente for help.

Company Information

* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING
Georgia

*LEGAL BUSINESS NAME

The legal company name is the name as stated on your local business license, quarterly wage and tax report, corporate or partnership documents.

*QUOTE EFFECTIVE DATE

Plans and rates are based on the proposed effective date.

TOTAL NUMBER OF EMPLOYEES (FULL-TIME AND PART-TIME)

*HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

*PHYSICAL ADDRESS ZIP *COUNTY

Rates are based on the group's ZIP Code and county.

*Are any employees eligible for Medicare or on Medicare, either through age or disability?
 Yes No

Broker Contact

*FIRST NAME MIDDLE INITIAL *LAST NAME

*COMPANY ROLE OR TITLE *EMAIL

PHONE FAX

Add Employees (Census)

Use the 'Add Employees' screen to add subscribers. There are two preferred methods for entering census information- upload via the census template, or manual entry. These two methods help reduce the number of errors.

Note: If you use your own template, ensure that the census is on the first tab of your spreadsheet and the headers match what is in the census template (see below).

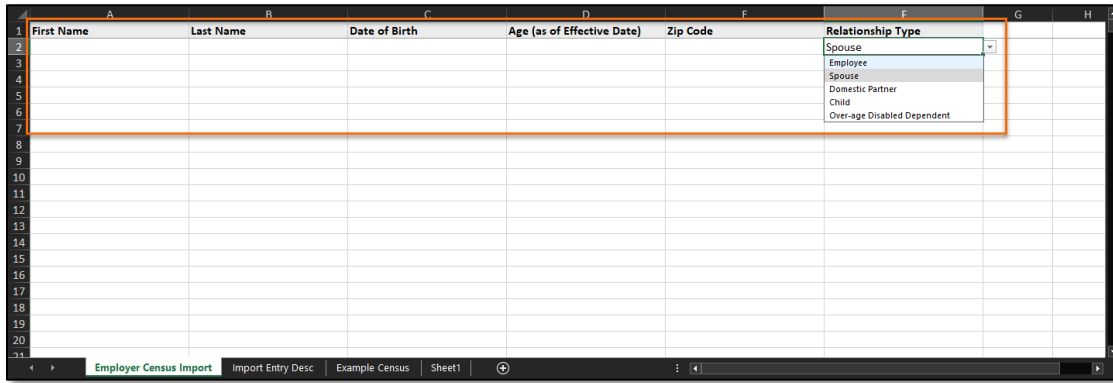
To upload employees/dependents using the Census Template


1. Click **Download census template**.

The screenshot shows the 'Add Employees' interface. At the top, there is a summary box with three columns: 'EMPLOYEES' with a value of 0, 'DEPENDENTS' with a value of 0, and 'TOTAL' with a value of 0. Below this, a message reads: 'To begin adding employees, select one of the buttons below.' There are two main options: 'Upload Census' and 'Manually Add Employees'. The 'Upload Census' option includes a document icon, instructions to import a census, a note about template requirements, and a list of required header labels: 'First Name, Last Name, Date of Birth, Age (as of Effective Date), Zip Code, Relationship Type'. It contains two buttons: 'Upload New Census' and 'Download Census Template', with the latter being highlighted by an orange box. The 'Manually Add Employees' option includes a group of people icon, a description of manual entry, and a '+ Add employee' button.

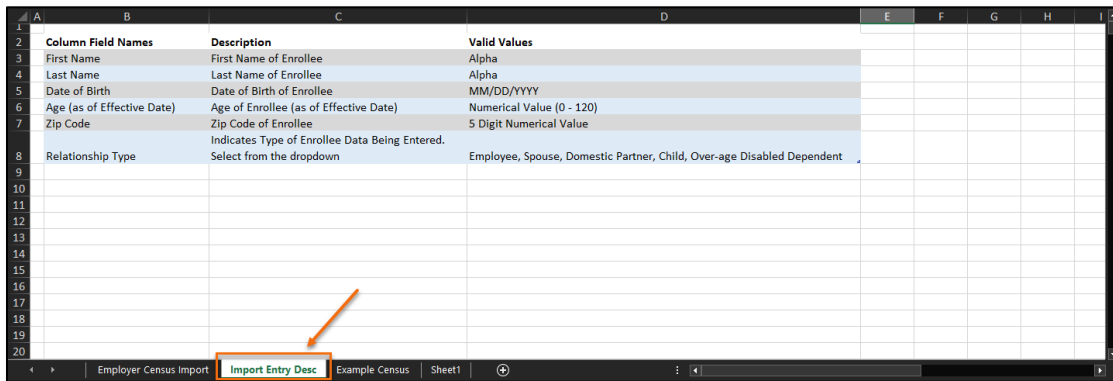
2. Open the excel file **sgBrokerAddSubscribers** from your computer's Downloads folder.

5. Review the column headers.

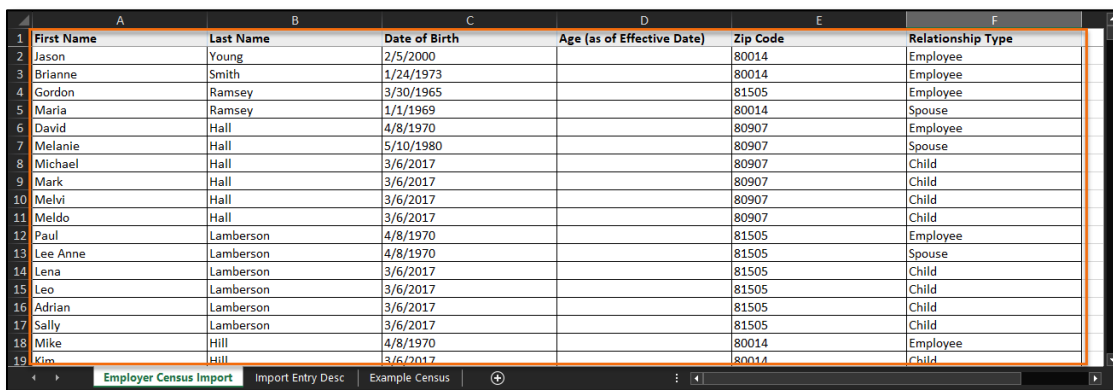


 Do not change the column headers or tabs in the census template, as they will map directly to the required fields in the quoting tool when the completed spreadsheet is uploaded.

6. Review the *Import Entry Desc* tab at the bottom of the template for how to format your data and to help avoid errors when importing the census to the quoting tool.



7. Return to the *Employer Census Import* tab to enter employee and dependent information.



Note the following regarding data entry:

- Date of Birth is required for Detailed Quote.
- Use alpha characters for first and last name.
- For a more precise Detailed Quote, enter accurate zip codes for individual employees instead of using a collective group zip code.


- To enter the *Relationship Type*, use the drop down menu to select a valid option. If you manually enter an invalid option, you will receive an error.
 - Employees with in-service-area and out-of-service-area zip codes may be entered in the census.
8. After you have entered the census data, save the spreadsheet in a designated folder/location on your PC.
 9. Save the spreadsheet in a designated folder/location on your PC.
 10. Return to the 'Add Employees' page, click **Upload Census** and upload the census from your computer.

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

To begin adding employees, select one of the buttons below.


Upload Census




Import a census by clicking "Upload new Census".


Note: If you use your own template please ensure the census is on the first tab of your spreadsheet and that the language in the header row matches the following labels exactly:

First Name, Last Name, Date of Birth, Age (as of Effective Date), Zip Code, Relationship Type


 **Upload New Census**


 [Download Census Template](#)

Manually Add Employees



This option provides you the ability to manually enter general Membership information. Selecting this option requires the completion of the Employee Enrollment Application located at the Required Documents page.

 Add employee

 At any time throughout the process, you can upload a new census; however, the new census will overwrite all subscriber data.

- Verify that the totals for Employees, Dependents and Total, match your spreadsheet.

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
7	15	22

[Download census template](#)
[Upload New Census](#)
[+ Add employee](#)

- Scroll down the page to verify the employee data. Edit employee information by typing into the fields, or use the **Delete Employee**, **Add Dependent** and **Delete Dependent** buttons, as needed.

Expand All | Collapse All Download census details | Delete all employees

EMPLOYEE 1
Jason Young 0 Dependents [Delete Employee 1](#)

Details

* FIRST NAME: Jason MIDDLE INITIAL: * LAST NAME: Young RELATIONSHIP TYPE: Employee

* DATE OF BIRTH mm/dd/yyyy: 11/11/1990 AGE (AS OF EFFECTIVE DATE): 34 * ZIP CODE: 21404

[+ Add dependent](#)

EMPLOYEE 2
Brianne Smith 0 Dependents [Delete Employee 2](#)

Details

* FIRST NAME: Brianne MIDDLE INITIAL: * LAST NAME: Smith RELATIONSHIP TYPE: Employee

Note the following regarding 'Out of Service Area':

- When a subscriber lives outside the service area zip code, a checkbox appears to confirm if the employee works within the service area.

* FIRST NAME: David MIDDLE INITIAL: * LAST NAME: King RELATIONSHIP TYPE: Employee

* DATE OF BIRTH mm/dd/yyyy: 12/20/1998 AGE (AS OF EFFECTIVE DATE): 24 * ZIP CODE: 80014

DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
 Yes

The employee ZIP Code is invalid or not in our service area. Please ensure that the ZIP Code is correct before proceeding.

Dependent 1

- Employees who live and work outside the service area only qualify for 'PPO' plans.
- Employees who live or work in the service area only qualify for non-'PPO' plans.
- "KP Select" plans are only available to employees living in qualified zip codes in Colorado Springs (Colorado only).

- When more than 49% of the subscribers live and work outside of the service area, you will not see a 'Next' button and cannot proceed with the Detailed Quote. Contact Kaiser Permanente for assistance.

Dependent 1

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * RELATIONSHIP TYPE

07/01/2004 19 Spouse

mm/dd/yyyy

+ Add dependent

Delete dependent 1

More than 49% of subscribers are outside of our service area. Please verify ZIP Codes and if correct, contact Kaiser Permanente for help.

Save Subscribers + Add employee

Previous

5. Once you have verified the employee and dependent information, scroll to the bottom of the page and click **Next** to select the medical plans.

Details

* FIRST NAME MIDDLE INITIAL * LAST NAME RELATIONSHIP TYPE

David King Employee

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * ZIP CODE

04/08/1970 55 80014

mm/dd/yyyy Enter 5-digit zip code

Dependent 1

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * RELATIONSHIP TYPE

04/08/1970 55 Spouse

mm/dd/yyyy

+ Add dependent

Delete dependent 1

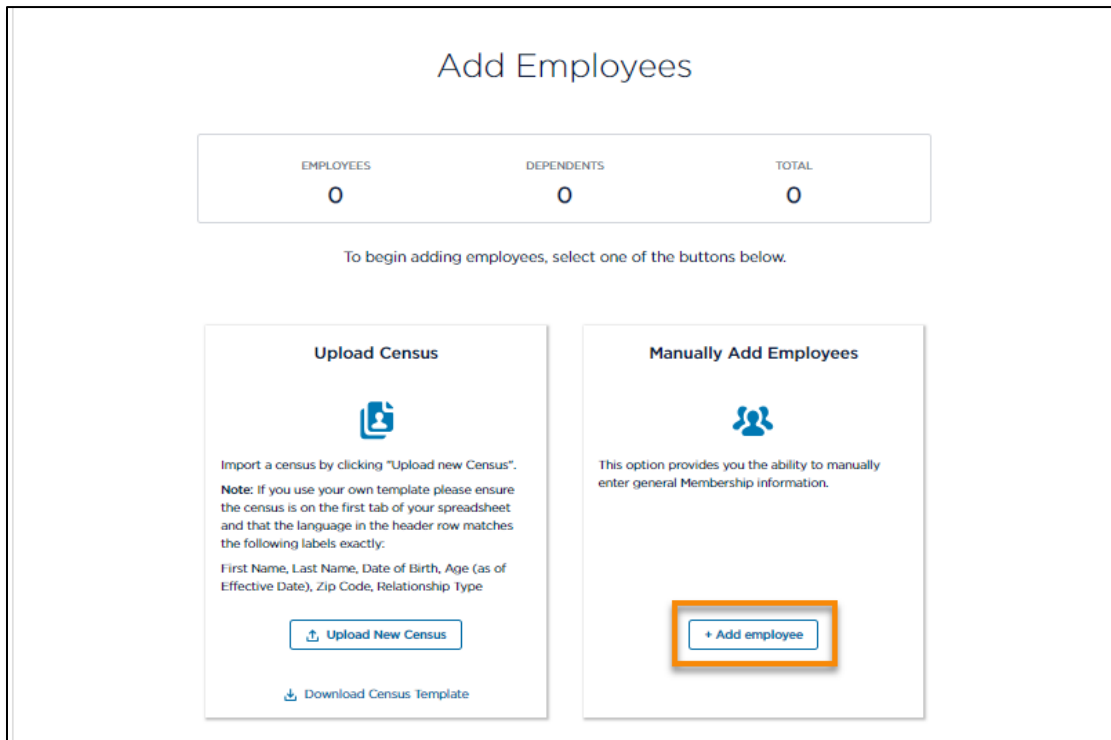
Save Subscribers + Add employee

Previous **Next**

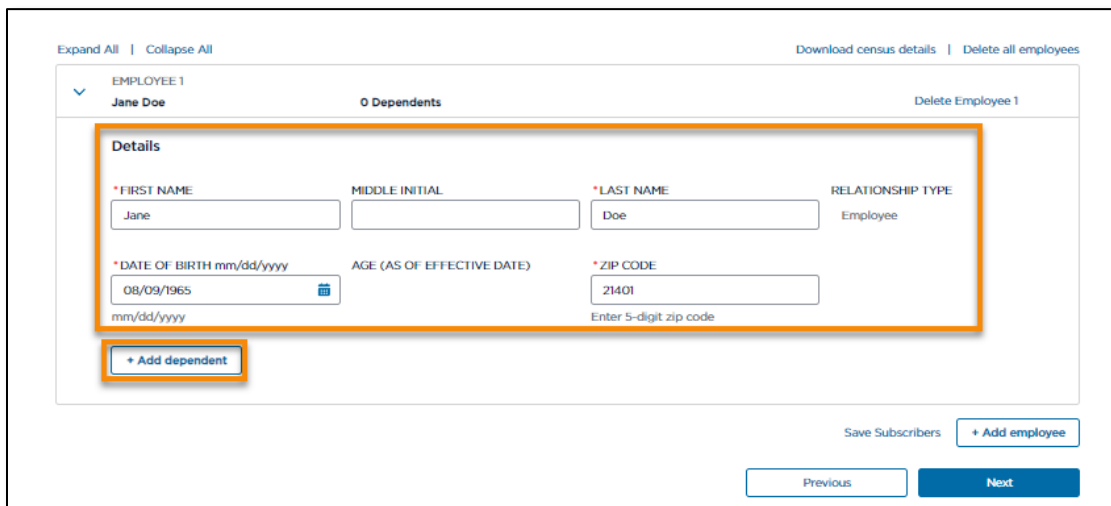
Cancel

To manually enter employees

1. From the 'Add Employees' screen, click **Add Employee**.



2. Type employee information into the fields.
3. Click **Add Dependent** to add a dependent under the Employee.
4. Click **Add Employee** for each additional employee.
5. When you have completed manually adding employees, click **Next** to select medical plans.



Plan Selection

Use the 'Plan Selection' screen to select the specific plans you will include in the quote.

Note: Out of area Employees only qualify for "PPO" plans; employees in the service area qualify for non-"PPO" plans only; 'KP Select' plans (CO only) are only available to employees living in qualified zip codes in Colorado Springs.

1. Use the **Search** and **Filters** to locate specific plans.
2. Select all the plans that you would like to include in the quote.

The screenshot displays the 'Plan Selection' interface. On the left, a sidebar contains a search bar and filter sections for Product Type, Metal Tiers, and Network. A red circle with the number '1' highlights the filter section. The main area on the right lists plan options under three categories: HMO, DHMO, and DHMO Select. A red circle with the number '2' highlights the selection checkboxes for the first two HMO plans. The interface also includes informational text at the top regarding subscriber counts and plan availability.

3. Click **Next**.

Plan Assignments

1. Assign a medical plan to each employee using the drop down menu.

Plan Assignments

Please choose plans for each employee listed below. When plan assignments are complete, select Next.

SEARCH EMPLOYEES

Search by employee's first or last name

SORT EMPLOYEES

7 of 7 employees

"KP Select" plans are only available to employees living in qualified zip codes in Colorado Springs, Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.

FIRST NAME	LAST NAME	DATE OF BIRTH	AGE AT EFFECTIVE DATE	ZIP CODE
Jason	Young	02/05/2000	23	80014
* SELECT A MEDICAL PLAN				
Select a medical plan...				
KP CO Platinum 0/10 RX Copay				
KP CO Platinum 400/10				
KP CO Gold 3T POS 1500/30				
KP CO Silver 2800/45				
BIRTH	SIBL	01/24/1975	AGE AT EFFECTIVE DATE	ZIP CODE
			51	80014
* SELECT A MEDICAL PLAN				
Select a medical plan...				

2. Click the caret to view any dependents covered under the employee.

Employee: Gordon Ramsey

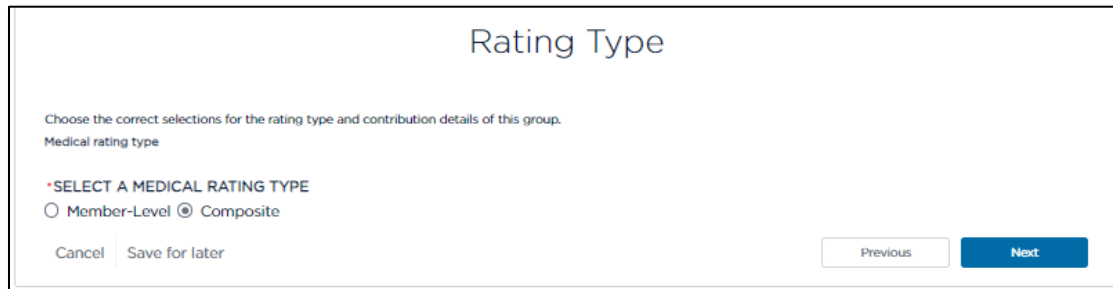
FIRST NAME	LAST NAME	DATE OF BIRTH	AGE AT EFFECTIVE DATE	ZIP CODE
Gordon	Ramsey	03/30/1965	58	80014
* SELECT A MEDICAL PLAN				
KP CO Platinum 400/10				
View Gordon's covered dependents				
Dependent 1	RELATIONSHIP	DATE OF BIRTH		
	Spouse	01/01/1969		

3. Click **Next** to continue.

Rating Type

Select the rating type for the Detailed Quote.

1. Click **Member Level** or **Composite***. This selection affects how the 'Detailed Quote Summary' is displayed in the following screen.
* Composite rating is only available when there are 2 or more subscribers for each medical plan offered.
2. Click **Next** to generate the 'Detailed Quote Summary'.



The screenshot shows a web form titled "Rating Type". Below the title, it says "Choose the correct selections for the rating type and contribution details of this group." and "Medical rating type". There is a red asterisk followed by "SELECT A MEDICAL RATING TYPE". Below this, there are two radio button options: "Member-Level" and "Composite". The "Composite" option is selected. At the bottom left, there are two buttons: "Cancel" and "Save for later". At the bottom right, there are two buttons: "Previous" and "Next". The "Next" button is highlighted in blue.

Detailed Quote Summary

The 'Detailed Quote Summary' provides rate totals based on employee zip code.

1. Scroll down the page to review the 'Detailed Quote Summary'.
2. Review the information on the screen for accuracy.
3. When you are ready to save the quote, click **Download Detailed Quote** (PDF or Excel).

Example with Member-Level Rating Type

Detailed Quote Summary

Your detailed quote is now complete and ready to download.
Rates are based on the information entered in the quoting process.


Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2024 have been filed and are under review. Plans will not be sold until reviews are complete. Adult dental rates shown are those that have been filed and are under review. Rates are subject to change.

[Download Detailed Quote \(.xlsx\)](#)

[Download Detailed Quote \(.pdf\)](#)


Company Name: CO DQ Test
 Effective Date: 08/01/2024
 Zip Code: 80014
 County: Arapahoe
 Employee Count: 6
 Member Count: 22
 Rating Type: **Member Level** ←

TOTAL EMPLOYEE
MEDICAL PREMIUM




\$5,333.22

TOTAL DEPENDENT
MEDICAL PREMIUM



\$8,401.60

TOTAL MONTHLY
MEDICAL PREMIUM



\$13,734.82

TOTAL MONTHLY PREMIUM : \$13,734.82

Medical Rate Details Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	MEDICAL PLAN	MEDICAL RATE	EMPLOYEE AND DEPENDENT TOTAL
1. Mike Hill	Employee	54	KP Select CO Gold 1/50/30/15A	\$793.40	
	Child	7		\$284.29	
	Child	7		\$284.29	
	Child	7		\$284.29	
2. David King	Employee	54	KP CO Gold PPO 2000/35 RX Copay	\$1,785.61	
	Spouse	54		\$1,785.61	
					\$2,571.22
3. Paul Lamberson	Employee	54	KP CO Gold DHMO Plus 1250/35	\$898.52	
	Spouse	54		\$898.52	
	Child	7		\$571.95	
	Child	7		\$571.95	
	Child	7		\$571.95	
	Child	7		\$0.00	
					\$2,762.89
4. David Hall	Employee	54	KP CO Gold DHMO Plus 1250/35	\$898.52	
	Spouse	44		\$587.93	
	Child	7		\$571.95	
	Child	7		\$571.95	
	Child	7		\$571.95	
	Child	7		\$0.00	
					\$2,452.30
5. Brienne Smith	Employee	51	KP CO Gold PPO 2000/35 RX Copay	\$1,305.56	
	Domestic Partner	59		\$1,543.04	
	Spouse	55		\$1,571.93	
					\$3,970.53
6. Jason Young	Employee	34	KP Select CO Gold 1/50/30/15A	\$571.61	

Example with Composite Rating type

Detailed Quote Summary


Your detailed quote is now complete and ready to download.
Rates are based on the information entered in the quoting process.

Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2024 have been filed and are under review. Plans will not be sold until reviews are complete. Adult dental rates shown are those that have been filed and are under review. Rates are subject to change.

Download Detailed Quote (.xlsx) Download Detailed Quote (.pdf)

Company Name: **CO DQ Test**
 Effective Date: **08/01/2024**
 Zip Code: **80014**
 County: **Arapahoe**
 Employee Count: **6**
 Member Count: **22**
 Rating Type: **Composite** ←

TOTAL MONTHLY MEDICAL PREMIUM



\$13,052.32

Medical Rate Details Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	TIER	MEDICAL PLAN	EMPLOYEE AND DEPENDENT TOTAL
1. Mike Hill	Employee	54	EMPLOYEE + CHILD(REN)	KP Select CO Gold 1/5Q/3Q/1SA	
	Child	?			
	Child	?			
	Child	?			
	Child	?			
					\$1,715.67
2. David King	Employee	54	EMPLOYEE + SPOUSE	KP CO Gold PPO 2000/25 RX Copay	
	Spouse	54			
					\$2,955.24
3. Paul Lamberson	Employee	54	EMPLOYEE + FAMILY	KP CO Gold DHP40 Plus 1250/25	
	Spouse	54			
	Child	?			
	Child	?			
	Child	?			
	Child	?			
					\$2,989.74
4. David Hall	Employee	54	EMPLOYEE + FAMILY	KP CO Gold DHP40 Plus 1250/25	
	Spouse	44			
	Child	?			
	Child	?			
	Child	?			
	Child	?			
					\$2,989.74
5. Brienne Smith	Employee	51	EMPLOYEE	KP CO Gold PPO 2000/25 RX Copay	
	Domestic Partner	59			
	Spouse	55			
					\$1,477.62
6. Jason Young	Employee	24	EMPLOYEE	KP Select CO Gold 1/5Q/3Q/1SA	
					\$926.31

Total Monthly Premium \$13,052.32

Your Kaiser Permanente Portfolio

MEDICAL PLANS	EMPLOYEE RATE	EMPLOYEE + SPOUSE RATE	EMPLOYEE + CHILDREN RATE	EMPLOYEE + FAMILY RATE
KP CO Gold 2500/10	\$981.45	\$1,962.90	\$1,815.68	\$2,797.13

4. At the bottom of the screen, in the **What would you like to do next?** section, you can:
- **Enroll Group:** This “click to buy” option begins a new group enrollment using the data you already entered for the quote. For complete steps, refer to the document ‘General Agent Step-By-Step Guide- SG New Self Service Group Enrollment’ in the Help Center.
 - **Requote this Group:** If you need to makes changes to the quote, such as the Rating Type or Plan Assignments, you can requote using the data you already entered. Refer to the [Requote](#) section of this document.



Cancel, Save or Edit a Quote

Cancel a Quote

You can abandon a quote you've started.

1. From any of the screens in the quote, click **Cancel** in the lower left corner of the screen.
2. Any data you've entered will not be saved.



A screenshot of a web form for entering quote information. At the top, there are two empty text input fields. Below them are two labels, 'PHONE' and 'FAX', each followed by an empty text input field. In the bottom right corner, there is a blue button labeled 'Next'. In the bottom left corner, there is a button labeled 'Cancel' which is highlighted with an orange border.

Save Subscribers for later

Each time you click 'Next' during a Quote, the system saves your work. But what if you are mid-way through adding subscribers in the 'Add Employees' screen and need to step away? Follow these steps to save your data and then you can return to where you left off later.

1. From the 'Add Employees' (census) screen, click **Save Subscribers**.

The screenshot shows the 'Add Employees' interface. At the top, a summary box displays 'EMPLOYEES: 2', 'DEPENDENTS: 1', and 'TOTAL: 3'. Below this are buttons for 'Download census template', 'Upload New Census', and '+ Add employee'. The main area lists two employees: 'EMPLOYEE 1: Jason Young' (0 Dependents) and 'EMPLOYEE 2: David King' (1 Dependent). Each employee has a 'Details' section with fields for first name, middle initial, last name, relationship type, date of birth, age, and zip code. Employee 2 also has a 'Dependent 1' section with fields for date of birth, age, and relationship type. At the bottom right, the 'Save Subscribers' button is highlighted with a red box. Other buttons include '+ Add employee', 'Previous', 'Next', and 'Cancel'.

2. Once you have saved the subscribers, you can either stay on this screen, or close the tab to return to the quote later. If you choose to close out of the quote after saving the subscribers, you can return where you left off, go to the 'Prospect Quote to Enroll' page.

3. Scroll down to **Your Recent Activity**.

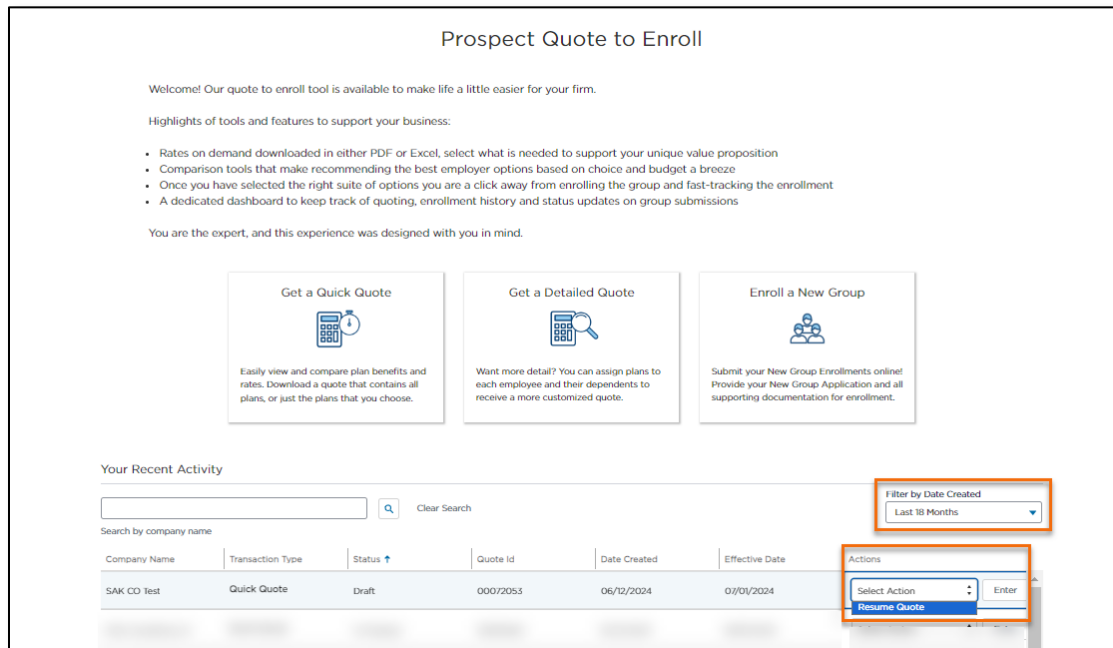
4. **Filter by Date Created**, if needed.

Note: Quotes are available in 'Your Recent Activity' for 18 months. To access a quote older than 18 months, please reach out to your KP sales representative.

5. Click the **Actions** drop down menu for the quote you wish to resume.

6. Select **Resume Quote**.

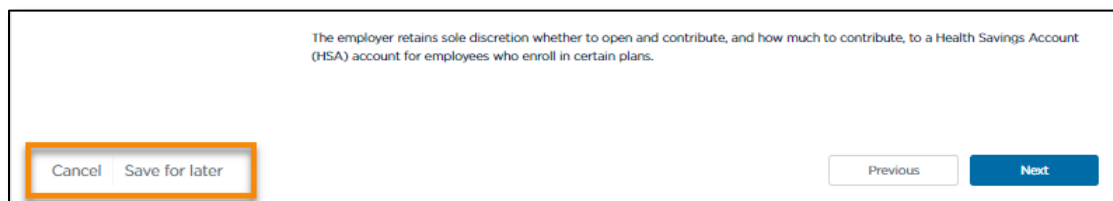
7. Click the **Enter** button to return to the screen where you left off.



Save a Quote for Later

Each time you click 'Next' during a Quote, the system saves your work. But what if you need to step away? Follow these steps to save your incomplete quote and then pick up where you left off later.

1. Once you are past the 'Add Employees' (census) screen, you will see the option to **Save for Later** on the bottom left side of the screen.

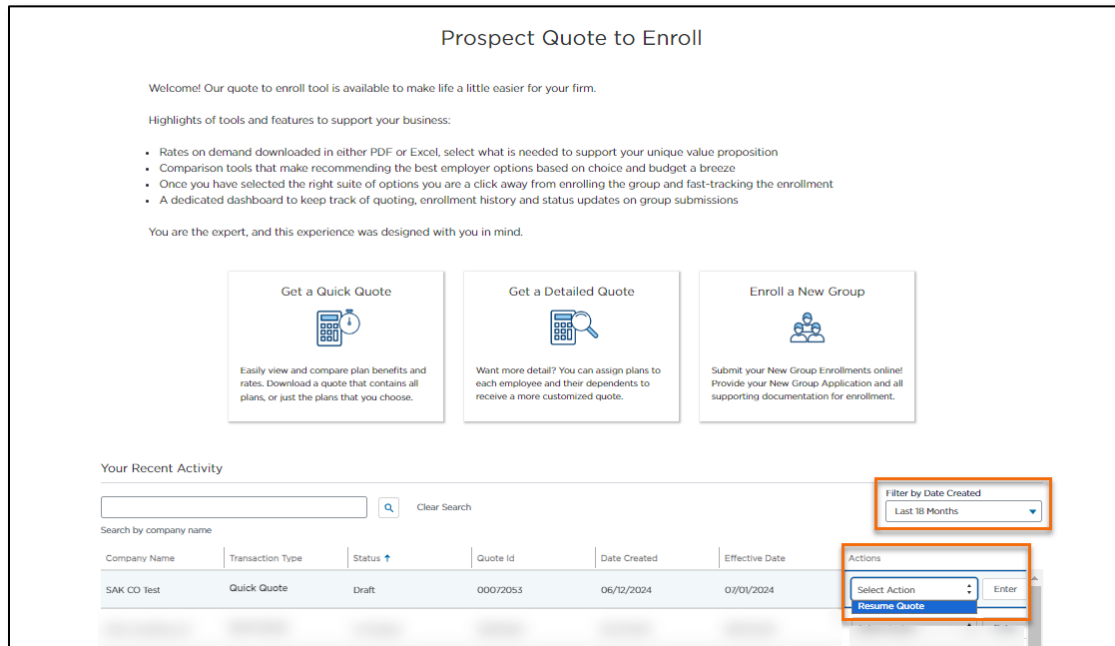


To return to where you left off, go to the 'Prospect Quote to Enroll' page.

1. Scroll down to **Your Recent Activity**.
2. **Filter by Date Created**, if needed.

Note: Quotes are available in 'Your Recent Activity' for 18 months. To access a quote older than 18 months, please reach out to your KP sales representative.

3. Click the **Actions** drop down menu for the quote you wish to resume.
4. Select **Resume Quote**.
5. Click the **Enter** button to return to where you left off.



Edit a Quote

You cannot modify a Quick Quote or Detailed Quote after it has been generated. To change an existing quote, you will need to complete a Requote. Refer to the [Requote](#) section of this document.

Convert a Quick Quote to a Detailed Quote

If you completed a Quick Quote but need a more detailed quote with employee plan assignments, you can convert the Quick Quote into a Detailed Quote.

Convert a Quick Quote beginning from the 'Prospect Quote to Enroll' page

1. Go to the **Prospect Quote to Enroll** page.
2. Search for the Group Name/Quick Quote under 'Your Recent Activity'.
3. Click the Actions menu and select **Requote to Detailed Quote**.
4. Click **Enter**.

The screenshot shows the 'Prospect Quote to Enroll' page. It includes a welcome message, highlights of tools and features, and three main action cards: 'Get a Quick Quote', 'Get a Detailed Quote', and 'Enroll a New Group'. Below these is a 'Your Recent Activity' section with a search bar containing 'sak' and a filter set to 'Last 18 Months'. A table lists activity items, with the first row highlighted. An 'Actions' dropdown menu is open over the first row, showing options: 'Select Action', 'Resume Quote', 'Convert to Buy', 'Requote Quick Quote', and 'Requote to Detailed Quote' (highlighted in blue). An 'Enter' button is also visible next to the dropdown.

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date
SAK CD Test	Quick Quote	Completed	0007996	06/10/2024	07/01/2024

5. Some of the information from the Quick Quote transfers to the Detailed Quote. Follow the steps to [Generate a Detailed Quote](#).

Convert a Quick Quote beginning from the 'Quote Summary' screen

1. The last screen of the Quick Quote is the 'Quote Summary' screen. Scroll to the bottom of the 'Quote Summary' screen.
2. Select **Requote to Detailed Quote**.

Out of Area

Out of area Employees only qualify for "PPO" plans. Employees in the service area qualify for non-"PPO" plans only.

PPO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
1 employee			
<input type="checkbox"/> KP CO Gold PPO 2000/35 RX Copay See Rate Details	\$1,265.61	\$2,626.08	\$3,891.69
<input type="checkbox"/> KP CO Silver PPO 3500/50 RX Copay See Rate Details	\$1,155.85	\$2,556.82	\$3,492.67
<input type="checkbox"/> KP CO Bronze PPO 7000/60 RX Copay See Rate Details	\$1,056.94	\$2,193.10	\$3,250.04
<input type="checkbox"/> KP CO Silver PPO HDHP 5500/40% See Rate Details	\$1,119.36	\$2,522.60	\$3,441.96

Colorado Option PPO	Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<i>Number of eligible employees:</i>			
1 employee			
<input type="checkbox"/> KP Colorado Option Gold PPO See Rate Details	\$1,274.12	\$2,643.71	\$3,917.83
<input type="checkbox"/> KP Colorado Option Silver PPO See Rate Details	\$1,127.01	\$2,338.47	\$3,465.48
<input type="checkbox"/> KP Colorado Option Bronze PPO See Rate Details	\$1,063.92	\$2,207.58	\$3,271.50

[Download Select Plans Quote \(.pdf\)](#) [Download Select Plans Quote \(.xlsx\)](#) [Compare Plans](#)

More Options

- Enroll Group
- Requote Quick Quote
- Requote to Detailed Quote**

Cancel Save for later

3. Some of the group details and employee data that you entered in the Quick Quote will pre-populate in the Detailed Quote. Validate all pre-populated data and follow the steps for [Generate a Detailed Quote](#).

Requote

Requote the Group

When a Quick Quote or Detailed Quote requires changes in rating factors (group zip code, census and effective date), you will need to requote. Requoting creates a separate Quote ID but carries over the group information from the previous quote. Adjust group information, rating criteria and census data as needed.

If you completed a Quick Quote but need a more detailed quote with employee plan assignments, see the section [Convert a Quick Quote to a Detailed Quote](#).

Requote a Quick Quote

1. There are two ways to begin a requote for a Quick Quote. Select one of the following:
 - a. From the last screen of the Quick Quote (the 'Quote Summary' screen), scroll down the page and select **Requote Quick Quote**.

Dual Choice PPO OOA		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> PPO/0/0/20/5/11 - OOA Platinum	See Rate Details	\$777.90	\$0.00	\$777.90
<input type="checkbox"/> PPO/1000/20/30/5/11 - OOA Gold	See Rate Details	\$700.62	\$0.00	\$700.62
<input type="checkbox"/> PPO/2500/10/30/5/11 - OOA Gold	See Rate Details	\$652.57	\$0.00	\$652.57
<input type="checkbox"/> PPO/3850/30/50/5/11 - OOA Silver	See Rate Details	\$582.79	\$0.00	\$582.79
<input type="checkbox"/> PPO/4850/30/50/5/11 - OOA Silver	See Rate Details	\$565.24	\$0.00	\$565.24
<input type="checkbox"/> PPO HDHP/3800/20/5/11 - OOA Silver	See Rate Details	\$580.69	\$0.00	\$580.69
<input type="checkbox"/> PPO HDHP/5000/20/5/11 - OOA Silver	See Rate Details	\$550.47	\$0.00	\$550.47
<input type="checkbox"/> PPO 6500/20/60/5/11 - OOA Bronze	See Rate Details	\$500.42	\$0.00	\$500.42
<input type="checkbox"/> PPO HDHP/7250/10/5/11 - OOA Bronze	See Rate Details	\$519.60	\$0.00	\$519.60

[Download Select Plans Quote \(.pdf\)](#) [Compare Plans](#)

What would you like to do next?

- Enroll Group
- Requote Quick Quote
- Requote to Detailed Quote

Cancel Save for later

- b. Or, from the 'Prospect Quote to Enroll' page, go to 'Your Recent Activity'. Look for the Quick Quote you want to requote. Select **Requote to Quick Quote** from the **Actions** drop down menu. Click **Enter**.

Prospect Quote to Enroll

Welcome! Our quote to enroll tool is available to make life a little easier for your firm.

Highlights of tools and features to support your business:

- Rates on demand downloaded in either PDF or Excel, select what is needed to support your unique value proposition
- Comparison tools that make recommending the best employer options based on choice and budget a breeze
- Once you have selected the right suite of options you are a click away from enrolling the group and fast-tracking the enrollment
- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions

You are the expert, and this experience was designed with you in mind.

Get a Quick Quote

Get a Detailed Quote

Enroll a New Group

Your Recent Activity

sak Clear Search Filter by Date Created Last 18 Months

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
SAK CO Test	Quick Quote	Completed	00072028	06/11/2024	07/01/2024	Select Action Resume Quote Convert to Buy Requote Quick Quote Requote to Detailed Quote

2. The system will begin a new Quick Quote with the group information you previously entered.
3. Follow the steps for [Generate a Quick Quote](#), making adjustments, as needed.



In some cases, not all previously entered data is carried over into the new quote. Validate that all data that has copied over into the new quote.

Requote a Detailed Quote

1. There are two ways to begin a requote for a Detailed Quote. Select one of the following:
 - a. From the last screen of the Detailed Quote (the 'Detailed Quote Summary' screen), scroll down and select **Requote this group**.

The screenshot shows a summary of a quote for 7. Jason Young, an Employee aged 23. The total monthly premium is \$12,957.32. Below this is a table of medical plans:

MEDICAL PLANS	EMPLOYEE RATE	EMPLOYEE + SPOUSE RATE	EMPLOYEE + CHILDREN RATE	EMPLOYEE + FAMILY RATE
KP CO Platinum 0/10 RX Copay	\$1,014.57	\$2,029.14	\$1,876.95	\$2,891.52
KP CO Platinum 400/10	\$956.26	\$1,912.52	\$1,769.08	\$2,725.34
KP CO Gold 3T POS 1500/30	\$1,034.97	\$2,069.94	\$1,914.69	\$2,949.66
KP CO Silver 2800/45	\$722.72	\$1,445.44	\$1,337.03	\$2,059.75

Below the table is a dialog box titled "What would you like to do next?" with two options: "Enroll Group" and "Requote this group". The "Requote this group" option is highlighted with an orange border. There are also "Cancel" and "Save for later" buttons at the bottom of the dialog.

- b. Or, from the 'Prospect Quote to Enroll' page, go to 'Your Recent Activity'. Look for the Detailed Quote you want to requote. Select **Requote** from the **Actions** drop down menu. Click **Enter**.

The screenshot shows the "Prospect Quote to Enroll" page. It includes a welcome message and highlights of tools and features. Below this are three main action buttons: "Get a Quick Quote", "Get a Detailed Quote", and "Enroll a New Group".

At the bottom, there is a "Your Recent Activity" section with a search bar containing "sak" and a filter set to "Last 18 Months". Below the search bar is a table of recent activities:

Company Name	Transaction Type	Status	Quote id	Date Created	Effective Date	Actions
SAK DQ Test	Detailed Quote	Completed	000/2050	06/11/2024	07/01/2024	Select Action Resume Quote Convert to Buy Requote

The "Requote" option in the Actions dropdown menu is highlighted with an orange border.

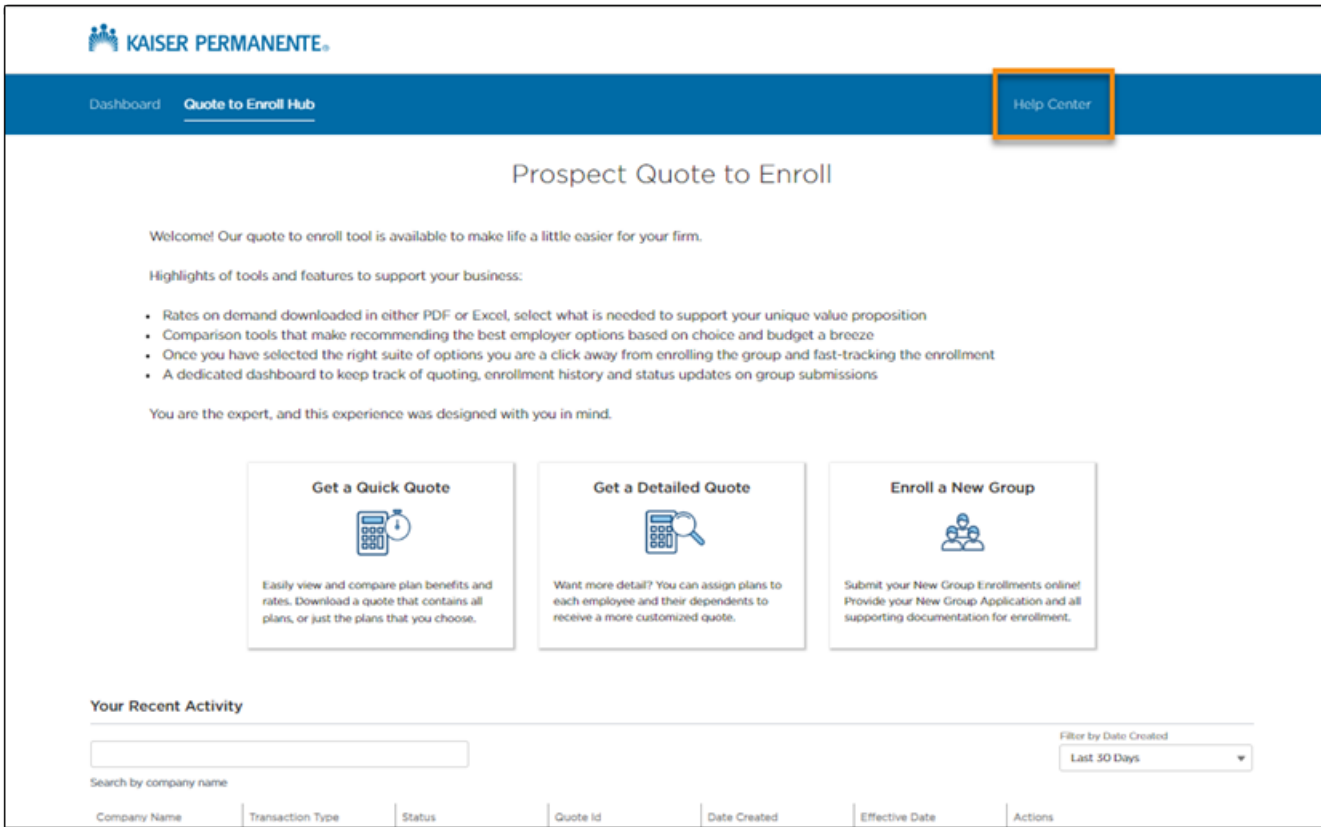
2. After Requote is selected, the system will begin a new Detailed Quote with the group information you previously entered.
3. Follow the steps for [Generate a Detailed Quote](#), making adjustments, as needed.



In some cases, not all previously entered data is carried over into the new quote. Validate that all data that has copied over into the new quote.

Need Help?

If you need help with the Self-Service tools, the **Help Center** is just a click away. Check it out for step-by-step instructions, new group enrollment forms and other helpful resources.



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