



02: Generate New Self-Service Group Enrollment

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Overview

This document describes the steps for generating a small group 'New Group Enrollment'. These self-service 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

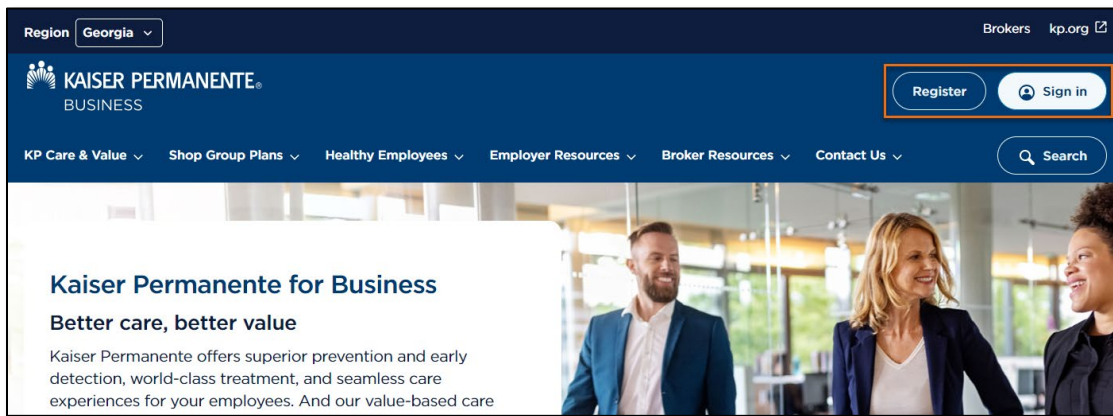
Where to Locate the General Agent Self-Service Tools

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

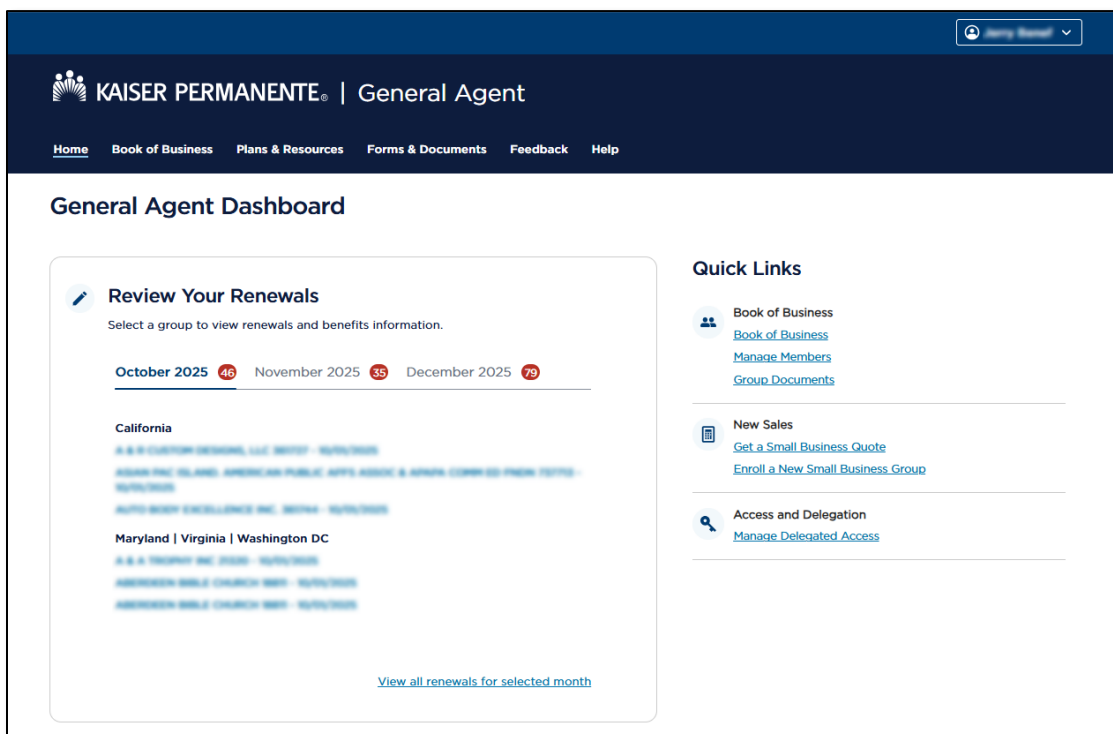
Sign In

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.)



Preparing for New Group Enrollment

If you would like to prepare the required documents before starting the online enrollment, you can find them in the [Help Center](https://kp.my.site.com/s/helpcenter) (https://kp.my.site.com/s/helpcenter).

Required documents include:

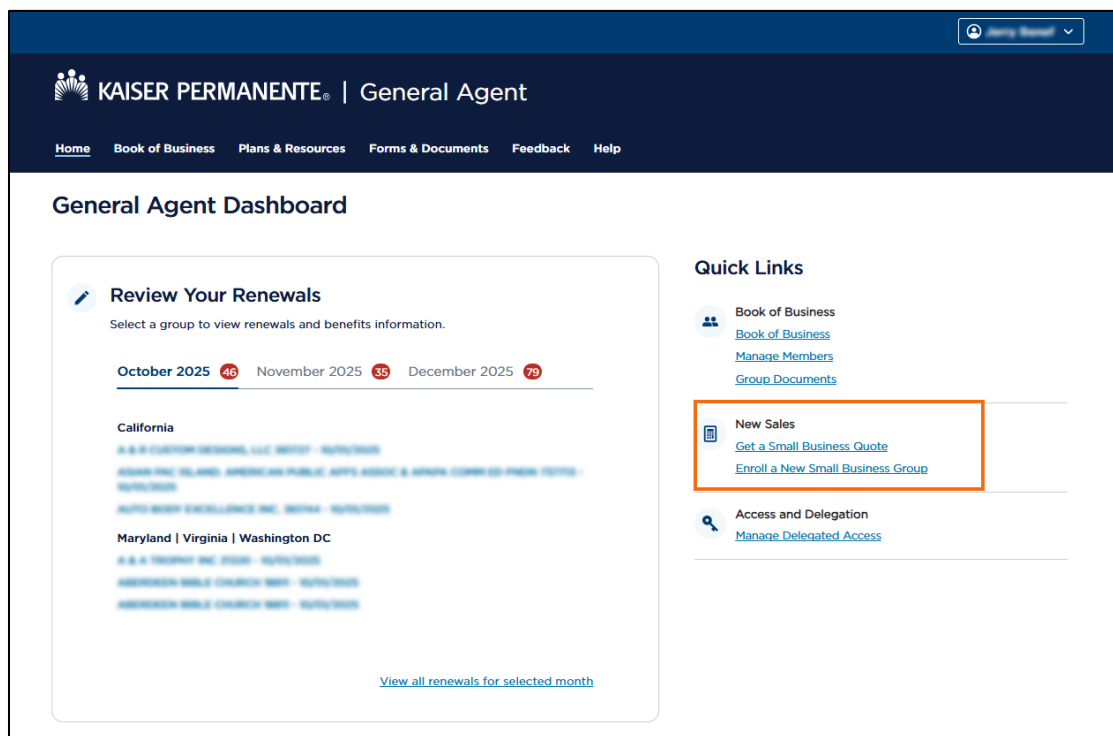
1. Membership Enrollment Spreadsheet: You can either upload this as the employee census, or you can upload it in the Required Documents screen.
2. New Group Broker of Record Authorization: This replaces the signed new group application and grants authority from your client to act on their behalf. Download and have your client sign it.
3. PGA (Online Account Services) form: Complete all required fields of the PGA (Online Account Services) form and obtain the signature from your client.
4. First Month's Payment (GA): Download and complete the EFT or provide a Binder check.

You will upload these documents toward the end of the online enrollment process (refer to [Required Documents](#)).

Begin a New Group Enrollment

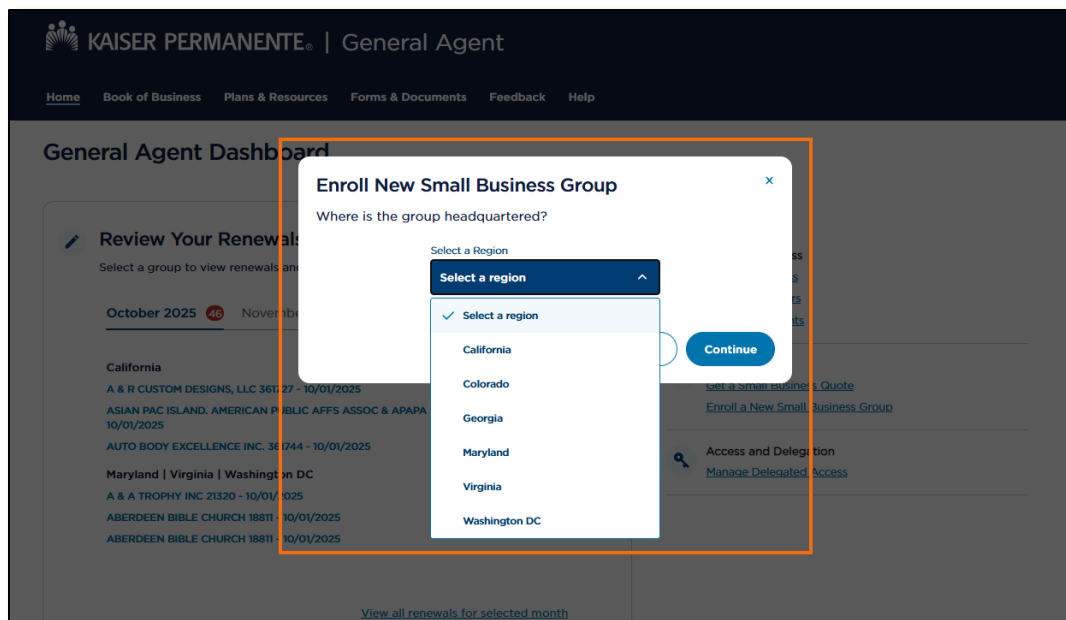
Submit your new group application with supporting documents online and then monitor the progress in real time.

1. From your Dashboard, click the link to **Enroll a New Small Business Group**.



2. Select the group's **Region** from the drop-down menu.
Note: The drop down will show all regions your firm is contracted with. This step-by-step guide is specific to groups within the Colorado and Georgia regions.

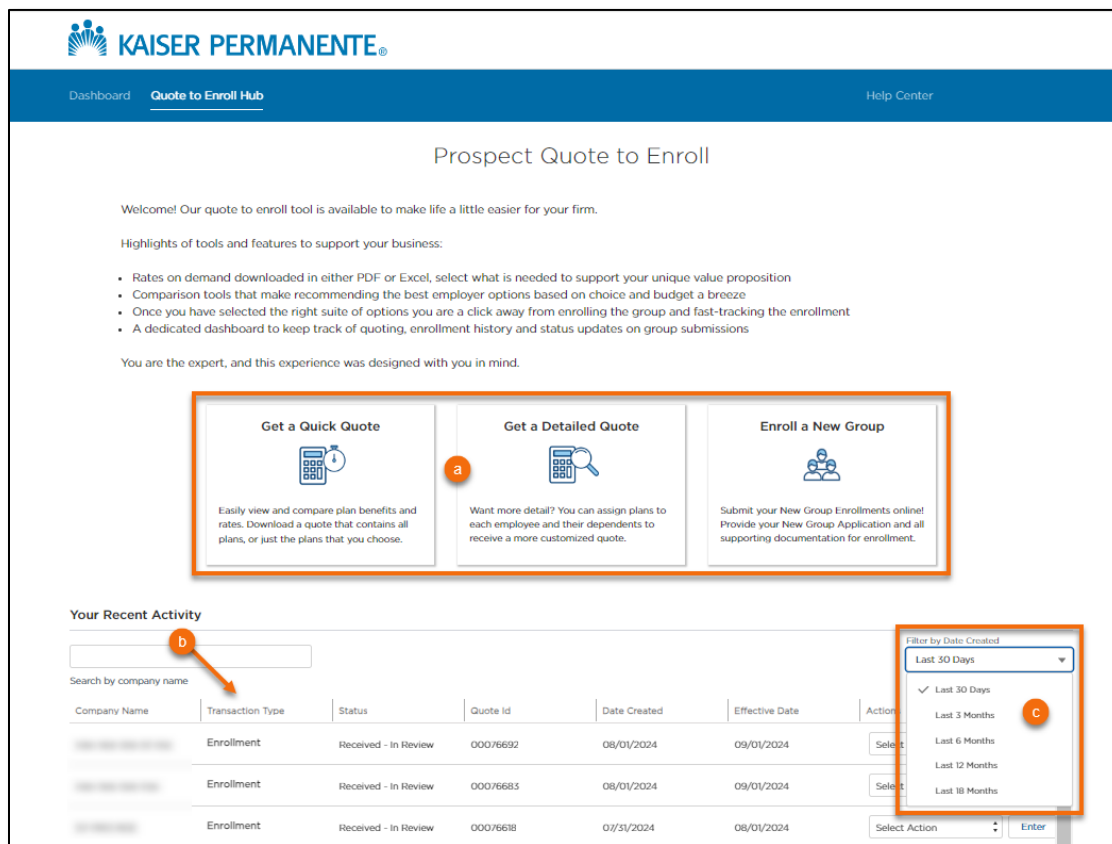
3. Click **Continue**.



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.



New Group Enrollment

Begin New Group Enrollment

Submit your new group application with supporting documents online and then monitor the progress in real time. There are three ways you can begin new group enrollment:

If you have not previously completed a quote for the group:

1. Begin on the 'Prospect Quote to Enroll' page.
2. Click **Enroll a New Group** to initiate the enrollment process.

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Dashboard [Quote to Enroll Hub](#)

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
MAS NGE Demo	Enrollment	In Progress	00032791	12/01/2023	01/01/2024	<input type="button" value="Resume Quote"/> <input type="button" value="Enter"/>

If you have previously completed a Quick Quote or a Detailed Quote for the group:

1. Begin on the 'Prospect Quote to Enroll' page.
2. Locate the quote under 'Your Recent Activity'.
3. Open the **Actions** drop-down and select **Convert to Buy** to convert your quote to a New Group Enrollment.



When you convert a quote to a group enrollment, some of the data will carry over from the quote. Validate all information that carried over.

4. Click **Enter**.

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Dashboard Quote to Enroll Hub

Prospect Quote to Enroll

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

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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
GA-CD-18 GQ Demo	Quick Quote	Completed	00032346	12/05/2023	01/01/2024	<div><p>Select Action</p><p>Resume Quote</p><p>Convert to Buy</p><p>Requote</p></div>

Convert a quote to a New Group Enrollment at the end of the quoting process.

1. When you get to the 'Quote Summary' or 'Detailed Quote Summary' page, scroll to the bottom.
2. In the 'More Options' section, click **Enroll Group**.

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	\$1,355.85	\$2,556.82	\$3,492.67
<input type="checkbox"/> KP CO Bronze PPO 7000/60 RX Copay See Rate Details	\$1,056.94	\$2,195.10	\$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	\$2,645.71	\$3,917.83
<input type="checkbox"/> KP Colorado Option Silver PPO See Rate Details	\$1,127.01	\$2,538.47	\$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. Once you have initiated the New Group Enrollment, you will complete a series of screens, starting with 'Group Details'. You'll notice a graphic at the top of each page that shows which step you are on in the enrollment process.

Group Details

Group Details

Note the following:

- Effective Dates: Effective dates are available for the 1st of the month.
- Physical Street Address: When you enter an address, the system will validate it. If the system is unable to validate the address, click the checkbox and provide any missing address information.
- Policy #: If you select 'yes, my company has worker's compensation' but don't know the policy #, you can enter 'Unknown' or 'Pending' in the field.

2. Click **Next** to continue.

Note: Enrollments will not appear in 'Your Recent Activity' until after you have clicked 'Next' on this page.

Enter Group Eligibility

Enter information about the group's eligibility.

1. Complete all required fields (*indicates a required field).

Note: The screen capture for example only. You might see different fields, depending on your state's group application and any selections you have made.

Group Eligibility

* Indicates required field

Other medical coverage

* Does your company or affiliated company(ies) have or has it ever had group coverage directly through Kaiser Permanente? If Yes, please provide the group number and company name.
 Yes No

* Does your company currently have active group health coverage?
 Yes No

Employer eligibility

In determining the number of employees or eligible employees, affiliated companies that are eligible to file a combined tax return for purposes of state taxation shall be considered 1 employer.

* Is your company affiliated with another company and eligible to file a combined tax return?
 Yes No

Employee count

Please provide the total number of employees nationwide (full-time and part-time).

* TOTAL
50

Eligible and enrolling employees

* TOTAL NUMBER OF ELIGIBLE EMPLOYEES: 20
* TOTAL NUMBER OF ENROLLING EMPLOYEES: 7

* HOURS PER WEEK EMPLOYEES MUST WORK TO BE ELIGIBLE FOR COVERAGE
32

* Are you offering dependent coverage?

2. From this point on during the enrollment process, you may click **Save for later** if you need to step away. Refer to the section below, [Save, Edit or Cancel the Enrollment](#), for details.

Are you subject to TEFRA?
 Yes No

If your company employed 20 or more full-time and/or part-time employees for each working date for 20 or more calendar weeks in the current calendar year or preceding calendar year, your group is subject to this federal law.

Cancel **Save for later** Previous Next

3. Click **Next** to continue.

Contacts

Enter information about the group's contacts.

1. Enter the **Contract Signer** information. This is the person responsible for signing the application and authorized to make contractual changes to the account. (* indicates a required field).
2. Enter the **Billing Contact** or click the checkbox if the billing contact is "same as contract signer".
3. Click **Next**.

Contacts

* Indicates required field

Contract Signer

This person is responsible for receiving and providing renewal information, and is authorized to make membership or contractual changes to your account. This address will become the group mailing address, if different from the business physical address.

*FIRST NAME MIDDLE INITIAL *LAST NAME

TITLE

*MAILING ADDRESS

*CITY *STATE *ZIP

*OFFICE PHONE EXTENSION

CELL PHONE *EMAIL

Billing Contact

The billing contact is the person within your company to whom billing statements are addressed. This person will have access to group information. Only 1 billing contact is allowed.

Check here if same as the contract signer

*FIRST NAME MIDDLE INITIAL *LAST NAME

TITLE

*MAILING ADDRESS

*CITY *STATE *ZIP

*OFFICE PHONE EXTENSION

CELL PHONE *EMAIL

Colorado: You will see an option to select if you prefer paper or paperless bills.

Bill Delivery Preference

*Let us know how you prefer to receive your bills.

I would like paperless bills.

I would like paper bills.

I understand that if I do not sign up for paperless billing, Kaiser Permanente will mail a paper statement. I further understand that I can opt in or out of paperless billing at any time. 30-day notification is required to make changes in billing notification processing.

Confirm Agent of Record

1. Enter the broker information in the 'Agent of record' section.
2. Enter the general agent information in the 'General Agent Details' section.

Click **Next**.

Confirm Agent of Record

*Indicates required field

Agent of record

<small>*AGENT/BROKER FIRST NAME</small> <input type="text" value="Broker First"/>	<small>*AGENT/BROKER LAST NAME</small> <input type="text" value="Broker Last"/>	
<small>*PREFERRED PHONE</small> <input type="text" value="(123) 456-7890"/>	<small>EXT</small> <input type="text"/>	<small>*EMAIL</small> <input type="text" value="broker@email.com"/>
<small>*FIRM NAME</small> <input type="text" value="Broker Firm"/>	<small>NATIONAL PRODUCER NUMBER NPN</small> <input type="text" value="8149117"/>	<small>*KAISER PERMANENTE BROKER FIRM ID</small> <input type="text" value="SAC"/>

General Agent Access

Your agent/broker may work with a General Agent (GA) to service your organization, which is a different firm from your agent/broker. The same agent/broker access to your group specific information and change permission will be granted to a designated General Agent unless you choose not to authorize access.

Do not check the box below if you consent.

Check this box ONLY if you DO NOT authorize a GA to access your group specific information, service your organization, change group information, or act on your behalf.

General Agent Details

<small>*GENERAL AGENCY NAME</small> <input type="text" value="GA Firm"/>	<small>*GENERAL AGENCY ID</small> <input type="text" value="GA ID"/>
<small>*AGENT FIRST NAME</small> <input type="text" value="GA First"/>	<small>*AGENT LAST NAME</small> <input type="text" value="GA Last"/>
<small>*AGENT CONTACT PHONE NUMBER</small> <input type="text" value="(123) 456-7899"/>	<small>*AGENT EMAIL ADDRESS</small> <input type="text" value="GA@email.com"/>

ADDITIONAL COMMENTS (OPTIONAL)

Add Employees (Census)

Use the 'Add Employees' screen to add employees and their dependents. There are three recommended methods for entering this information. These methods help reduce the number of errors.

Note the following:

- You are required to provide either the Membership Enrollment Spreadsheet or Employee Enrollment Forms to complete your submission. If you choose to upload the Membership Enrollment Spreadsheet in this step, the system retains it as part of the required documents to complete the new group enrollment submission.
- If you began the New Group Enrollment using 'convert to buy', the census data will pre-populate from your quote. Verify all employee/dependent data before proceeding to the next enrollment screen.
- If you choose to use your own census template, please ensure that the census is on the first tab of your spreadsheet and that the headers match the census template.

Method 1: Upload the Membership Enrollment Spreadsheet

1. Click **Download Enrollment Spreadsheet Template**.

The screenshot shows the 'Add Employees' interface. At the top, there are three counters: EMPLOYEES (0), DEPENDENTS (0), and TOTAL (0). Below these is the instruction: 'To begin adding employees, select one of the buttons below.' There are three main options:

- Upload Membership Enrollment Spreadsheet**: This option is highlighted with an orange border. It includes a 'Download Enrollment Spreadsheet Template' link at the bottom.
- Upload Census**: Includes a 'Download Census Template' link at the bottom.
- Manually Add Employees**: Includes a '+ Add employee' button at the bottom.

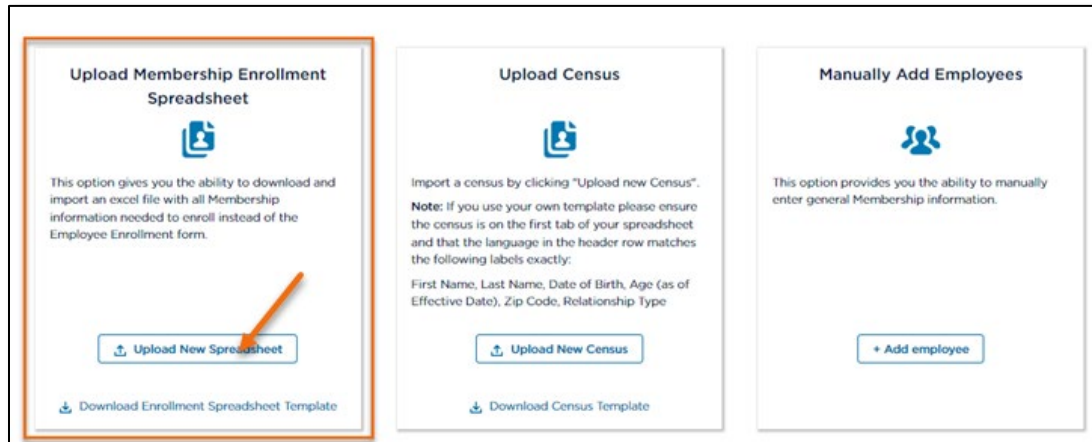
2. Open the Membership Enrollment template from your computer's downloads folder.
3. Complete the columns highlighted in yellow in the image below.

Note: If you are working from an pre-existing Membership Enrollment worksheet, please ensure that the 'Enrolling Employees' tab is the first tab, as shown in the image below.

1	A	B	C	D	E	F	G	H	I
2	Region Code	Group Number	Subgroup	Billgroup	EE SSN	Person SSN	Person Relationship	Person Last Name	Person First Name
3	CO				Employee	155118191	EMP	trigger	one
4					Employee	123546798	EMP	trigger	two
5									
6									
7									
8									
9									
10									
11									
12									

At the bottom of the spreadsheet, the 'Enrolling Employees' tab is highlighted in green, with an orange arrow pointing to it from the left.

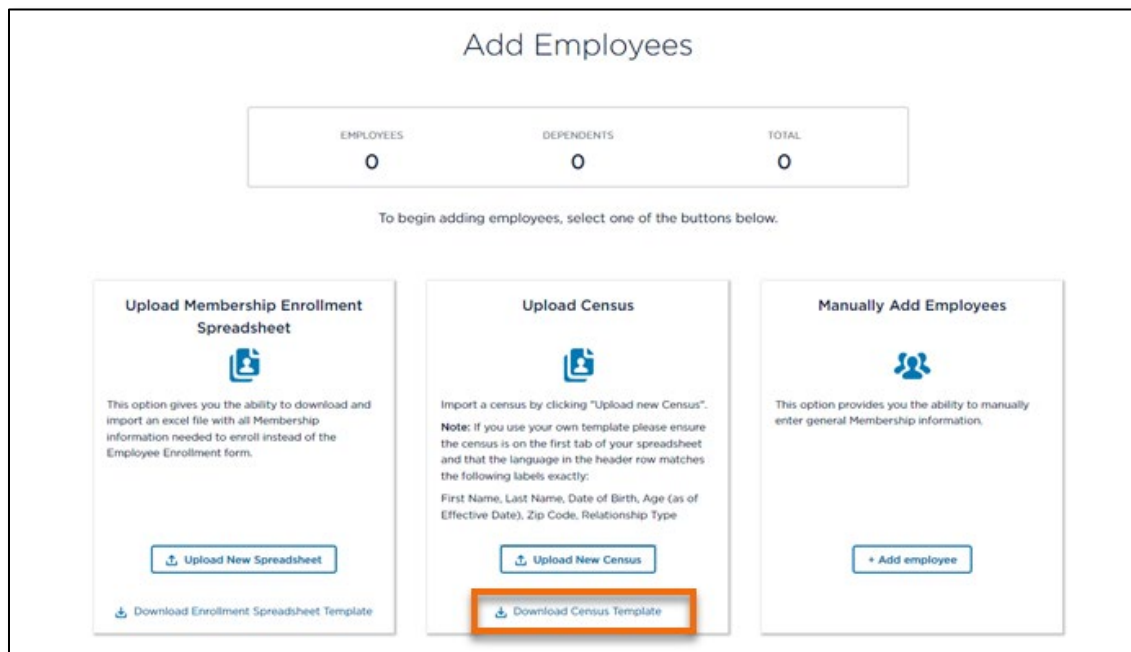
4. Return to the 'Add Employees' screen and click **Upload New Spreadsheet**.



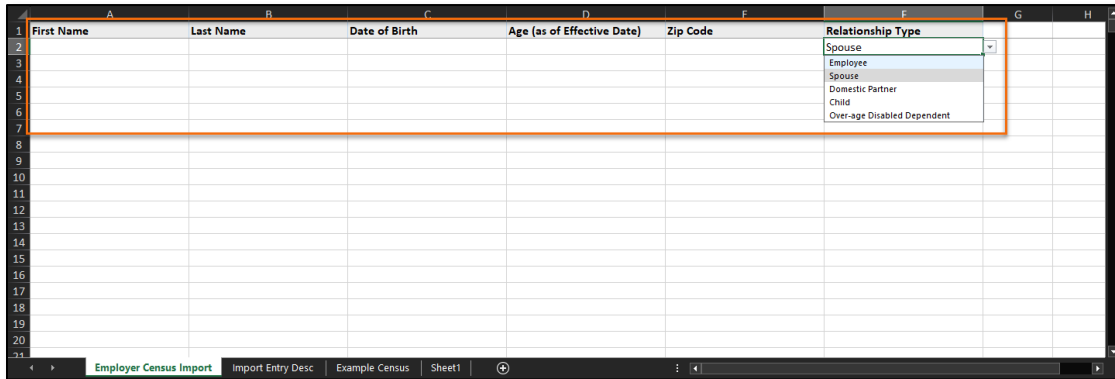
5. When you have finished adding members, continue to the section 'Validate member information', below.

Method 2: Upload employees and dependents using the Census Template

1. Begin by downloading a copy of the census template. In the 'Add Employees', screen, click **Download census template**.

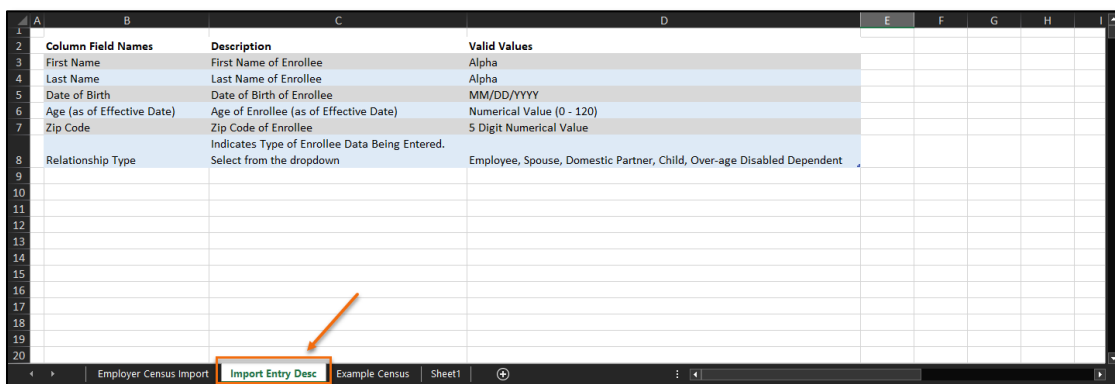
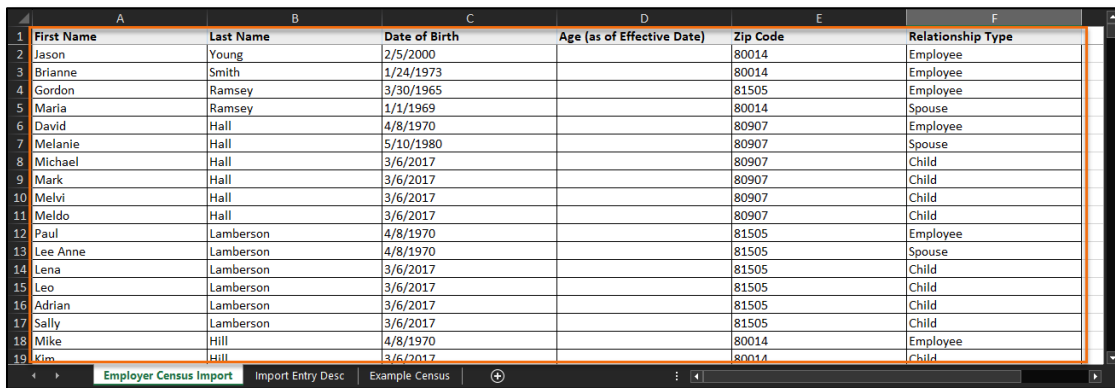


- On your computer, search your Downloads folder for the excel file **sgBrokerAddSubscribersTemplate**.
- Open the template in Excel.
- Review the column headers. Do not change the column headers or tabs in the census template; they map directly to the required fields in the enrollment tool when the completed spreadsheet is uploaded.



! If you choose to use your own census spreadsheet, ensure that the census is on the first tab of your spreadsheet and that the headers match this template.

- Enter employee information to the template (First Name, Last Name, DOB, etc). Refer to the *Import Entry Desc* tab at the bottom of the template for help with formatting the data and to help avoid errors.



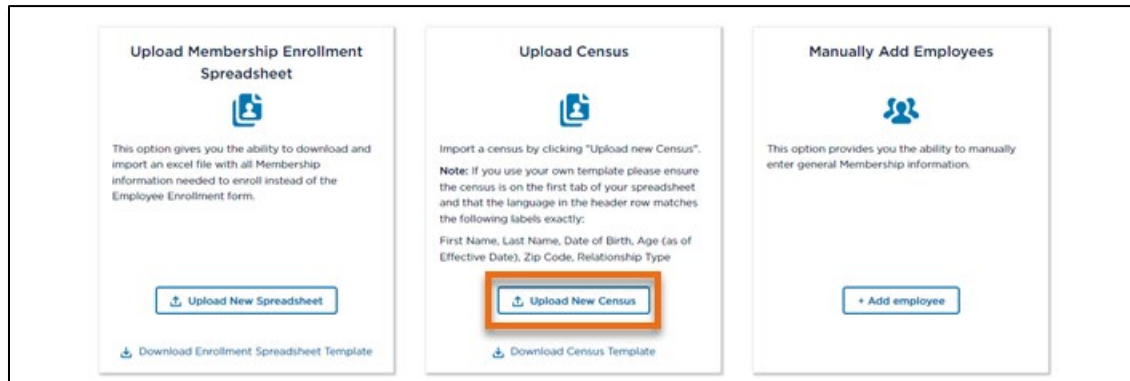
Note the following regarding data entry in the census spreadsheet:


- *Date of Birth* is required for New Group Enrollment.
- Use alpha characters for first and last name.

- Enter the employee zip code (not the business zip code) when completing New Group Enrollment.
- Enter both in-service-area and out-of-service-area employee zip codes in the census.
- 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.

6. Save the spreadsheet in a designated folder/location on your PC.

7. Return to the 'Add Employees' page, click **Upload New Census** and upload the census from your computer.

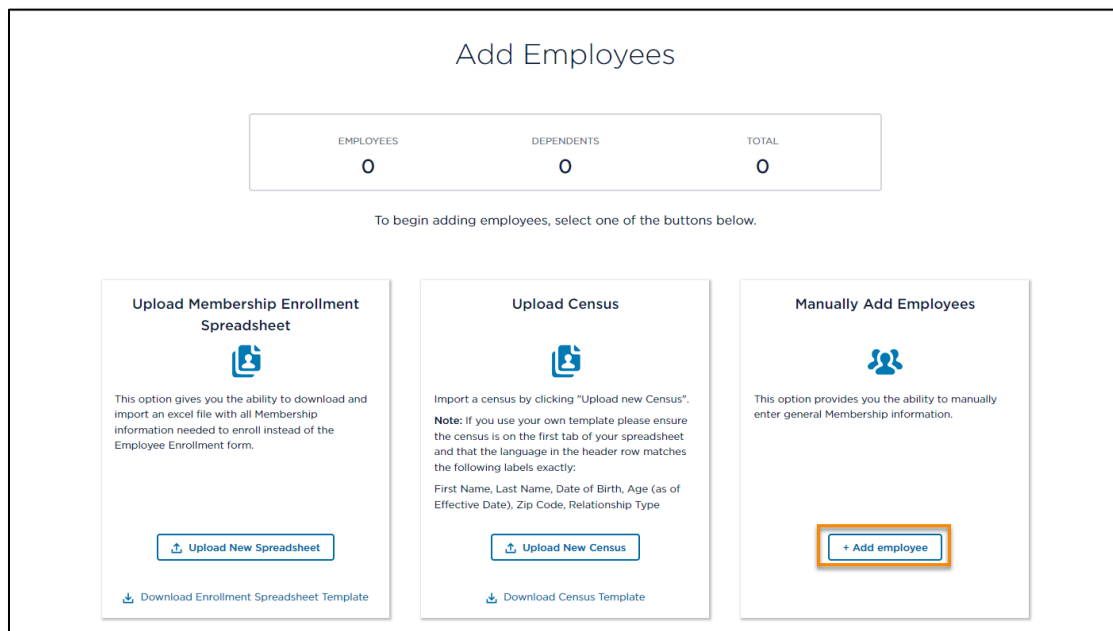


 At any time throughout the process, you can upload a new census; however, the new census will overwrite all subscriber data.

8. When you have finished adding members, continue to the section 'Validate member information', below.

Method 3: Manually add employees and dependents

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



2. Type employee information into the fields.
3. Click **Add Employee** for each additional employee.
4. Click **Add Dependent** to add any dependents with the employee.

Note the following regarding manual data entry:

- *Date of Birth* is required for New Group Enrollment.
- Use alpha characters for first and last name.
- Enter the employee zip code (not the business zip code) when completing New Group Enrollment.
- Enter both in-service-area and out-of-service-area employee zip codes in the census.
- 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.

5. When you have finished adding members, continue to the section 'Validate member information', below.

Validate member information

After adding employees using one of the methods described above, verify all information before proceeding to the next screen.

1. Verify that the totals for **Employees**, **Dependents** and **Total**, match your spreadsheet.
2. Scroll down the page to verify the data and correct any errors, which appear in red.

The screenshot displays a summary table at the top with the following data:

EMPLOYEES	DEPENDENTS	TOTAL
6	17	23

Below the summary are buttons for "Download census template", "Upload new census", and "+ Add employee".

The main section shows details for two employees:

- EMPLOYEE 1: Jason Young** (1 Dependent). Fields include: FIRST NAME (Jason), MIDDLE INITIAL, LAST NAME (Young), RELATIONSHIP TYPE (Employee), DATE OF BIRTH (02/05/2000), AGE (AS OF EFFECTIVE DATE), and ZIP CODE (80014). A "Delete Employee 1" button is present.
- Dependent 1** for Jason Young: DATE OF BIRTH (06/03/1991), AGE (AS OF EFFECTIVE DATE), and RELATIONSHIP TYPE (Child). A "Delete dependent 1" button is present.
- A red error message: "Non-disabled dependents over the age of 25 at the effective date cannot be enrolled." with an arrow pointing to the dependent's age field.
- A "+ Add dependent" button is also visible.
- EMPLOYEE 2: Brienne Smith** (2 Dependents). Fields include: FIRST NAME (Brienne), MIDDLE INITIAL, LAST NAME (Smith), and RELATIONSHIP TYPE (Employee). A "Delete Employee 2" button is present.

Note the following:

- Edit employee/dependent information by typing directly into the fields.
- Buttons are placed throughout to easily **Delete Employee**, **Delete Dependent** and **Add Dependent**, when needed.
- Plan rates are based on employee zip code. If an employee has a zip code that is outside the service area but he/she works within the service area check the 'Yes' box.

The screenshot displays details for **EMPLOYEE 3: Gordon Ramsey** (1 Dependent). Fields include: FIRST NAME (Gordon), MIDDLE INITIAL, LAST NAME (Ramsey), RELATIONSHIP TYPE (Employee), DATE OF BIRTH (03/30/1965), AGE (AS OF EFFECTIVE DATE) (59), and ZIP CODE (81505). A "Delete Employee 3" button is present.

A red error message is displayed: "The employee ZIP Code is invalid or not in our service area. Please ensure that the ZIP Code is correct before proceeding."

A checkbox is present with the text: "DOES THE EMPLOYEE WORK IN THE SERVICE AREA?" and the option "Yes".

- Employees who live and work out-of-area are only be eligible for PPO plans; in-area employees only qualify for non-PPO plans.

- **Colorado:** "KP Select" plans are only available to employees living in qualified zip codes in Colorado Springs.
- If more than 49% of the subscribers are outside of the service area, you will not see a 'Next' button at the bottom of the screen, and cannot continue with online group enrollment. Contact your Kaiser Permanente sales representative for help.

The screenshot shows a 'Details' form with the following fields and values:

- *FIRST NAME: Jane
- MIDDLE INITIAL: (empty)
- *LAST NAME: Doe
- RELATIONSHIP TYPE: Employee
- *DATE OF BIRTH mm/dd/yyyy: 05/04/1970
- AGE (AS OF EFFECTIVE DATE): 53
- *ZIP CODE: 81407
- DOES THE EMPLOYEE WORK IN THE SERVICE AREA? Yes

A red error message is displayed: "The employee ZIP Code is invalid or not in our service area. Please ensure that the ZIP Code is correct before proceeding."

An orange box highlights a warning message: "More than 49% of subscribers are outside of our service area. Please verify ZIP Codes and if correct, contact Kaiser Permanente for help."

Buttons visible include "+ Add dependent", "Save Subscribers", "+ Add employee", and "Previous". An orange arrow points to the "Previous" button.

3. After you have validated the employee and dependent information, scroll to the bottom of the page and click **Next** to select medical plans.

Saving your work for later

When entering employee and dependent information, you have the option to save the subscribers if you need to step away. To use this option, follow these steps:

1. Scroll to the bottom of the screen and click **Save Subscribers**.
2. If you select this option, you can either leave this screen open, or close out of the enrollment screen.
3. If you close out of the enrollment screen, follow the steps here to [return to it later](#).

The screenshot shows a portion of the enrollment form with the following fields and values:

- *DATE OF BIRTH mm/dd/yyyy: 04/08/1970
- AGE (AS OF EFFECTIVE DATE): 54
- *RELATIONSHIP TYPE: Spouse
- Delete dependent 1

The "Save Subscribers" button is highlighted with an orange box.

Buttons visible include "+ Add dependent", "Save Subscribers", "+ Add employee", "Previous", "Next", and "Cancel".

Medical Plan Selection

Select the plans that are being offered.

1. Refer to the top of the screen for guidelines on selecting plans.

Note: The screen shot below is for example only. You will see guidelines specific for your region.

2. Use the **Search** or **filters** to locate specific plans.
3. Select the check marks for all plans being offered.

Plan Selection

Please make your medical plan selections and click **Next** to continue.

1 Groups with 1-5 subscribers may offer a choice of up to 4 HMO plans, 1 PPO plan and 1 OOA plan. Groups with 6 or more subscribers may offer a choice of unlimited HMO plans, up to 2 PPO plans and 1 OOA plan. "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.

SEARCH

SEARCH [input] [magnifying glass icon]

Search by plan name

PRODUCT TYPE

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

METAL TIERS

- Platinum
- Gold
- Silver
- Bronze

2 NETWORK

- Standard
- Select

[Apply Filters]

Remove all filters

HMO

- KP CO Platinum 0/10 RX Copay
- KP CO Gold 0/20 RX Copay

DHMO

- KP CO Platinum 400/10
- KP CO Gold 500/25
- KP CO Gold 500/25 NEA
- 3** KP CO Gold 1500/25 RX Copay
- KP CO Gold 2500/10
- KP CO Silver 2800/45
- KP CO Silver 4000/50 RX Copay
- KP CO Silver 5000/10
- KP CO Silver 5000/10 NEA
- KP CO Bronze 7000/60 RX Copay

DHMO Plus

- KP CO Platinum DHMO Plus 250/20
- KP CO Gold DHMO Plus 1250/35
- KP CO Gold DHMO Plus 2000/40
- KP CO Silver DHMO Plus 3500/45

POS HMO

4. Correct any errors that appear in red at the bottom of the page. Refer to the guidelines at the top of the page, if needed.

5. Scroll to the bottom of the page and click **Next** to continue.

Subsidiary of Kaiser Foundation Health Plan, underwrites the Participating Provider Tier and Non-Participating Provider Tier of the Point-of-Service (POS) plans.

The PPO Plans are fully underwritten by KPIC.

Groups can offer no more than 1 Out of Area plan. Please modify your plan selection to continue.

Cancel | Save for later

Previous | Next

Plan Assignments

If offering two or more plans, you will need to assign a plan for each employee in the 'Plan Assignments' screen.

Note: If offering only one plan, the system automatically populates the plan assignment.

1. You can **Search** and **Sort** for employees.
2. Click the **Select a Medical Plan** drop down to select a plan for each employee.

The screenshot shows the 'Plan Assignments' interface. At the top, it says 'Please choose plans for each employee listed below. When plan assignments are complete, select Next.' Below this are search and sort options. A table lists employees, with the first row for Jason Young highlighted. A dropdown menu is open for Jason Young, showing four options: 'KP CO Platinum Q/10 RX Copay', 'KP CO Platinum 400/10', 'KP CO Gold 3T POS 1500/30', and 'KP CO Silver 2800/45'. The dropdown is highlighted with an orange box.

FIRST NAME	LAST NAME	DATE OF BIRTH	AGE AT EFFECTIVE DATE	ZIP CODE
Jason	Young	02/05/2000	23	80014
Brianne	Smith	01/24/1975	51	80014

3. Correct any errors in red.

The screenshot shows the 'Plan Assignments' interface for employee David Hall. The dropdown menu is selected with 'KP Select CO Gold 500/25 NEA'. Below the dropdown is a link to 'View David's covered dependents'. At the bottom, there is a red error message: 'In area (Denver Boulder) employees do not qualify for KP Select or PPO Plans.'

FIRST NAME	LAST NAME	DATE OF BIRTH	AGE AT EFFECTIVE DATE	ZIP CODE
David	Hall	04/08/1970	54	80014

4. After you have selected a plan for each employee, click **Next**.

Rating Type and Contribution Details

1. Make appropriate selections for the 'Rating Type and Contribution Details' (* indicates a required field).
 - Member-Level is the default Medical Rating Type.
 - The selection you make for Medical Rating Type affects how information will be displayed in the following screen.

Rating Type and Contribution Details

Choose the correct selections for the rating type and contribution details of this group.

Medical rating type

*SELECT A MEDICAL RATING TYPE

Member-Level Composite

Medical contribution details

Your contribution to coverage can be a percentage or a fixed dollar amount. Your minimum contribution must be at least 50% of the "Employee only" monthly premium for the lowest-priced Kaiser Permanent medical plan offered by the employer.

*CONTRIBUTION IS FOR

Employees Only Employees + Dependents

*SELECT A CONTRIBUTION TYPE

\$ Fixed Dollar Amount % Percentage

*SELECT WHICH PLANS WILL APPLY

Lowest Cost Plan All Plans Specific Plan

*CONTRIBUTION TO EMPLOYEE MEDICAL PREMIUM

Please input a percentage (numbers only, no special characters)

*CONTRIBUTION TO DEPENDENT MEDICAL PREMIUM

Please input a percentage (numbers only, no special characters)

Cancel Save for later Previous Next

2. Click **Next**.

Rate Presentation

1. Review the final rates in the Rate Presentation (* indicates a required field).


Rate Presentation

These are the final rates based on the information entered in the enrollment 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.


Company Name: **Sak NGE Test**
 Effective Date: **07/01/2024**
 Zip Code: **80014**
 County: **Denver**
 Employee Count: **6**
 Member Count: **22**
 Rating Type: **Member Level**

TOTAL EMPLOYEE MEDICAL PREMIUM




\$5,700.52

TOTAL DEPENDENT MEDICAL PREMIUM



\$7,609.64

TOTAL MONTHLY MEDICAL PREMIUM



\$13,310.16

TOTAL MONTHLY PREMIUM : \$13,310.16

Medical Rate Details Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	MEDICAL PLAN	MEDICAL RATE	EMPLOYEE AND DEPENDENT TOTAL
1. David Hall	Employee	54	KP CO Platinum 0/10 RX Copay	\$1,064.56	
	Spouse	44		\$696.57	
	Child	7		\$381.45	
	Child	7		\$381.45	
	Child	7		\$381.45	
	Child	7		\$0.00	
					\$2,905.48
2. Paul Lamberson	Employee	54	KP Colorado Option Gold PPO	\$1,274.12	
	Spouse	54		\$1,274.12	
	Child	7		\$456.53	
	Child	7		\$456.53	

2. If the information in this screen is not correct, click **Previous** to go back and make edits.
3. If everything on this screen is correct, click **Next**.

Total Monthly Medical Premium **\$13,310.16**

Your Kaiser Permanente Portfolio

MEDICAL PLANS
KP CO Platinum 0/10 RX Copay
KP Select CO Platinum 0/10 RX Copay
KP CO Gold 1500/25 RX Copay
KP Select CO Gold 1500/25 RX Copay
KP CO Gold DHMO Plus 1250/35
KP Colorado Option Gold PPO
KP CO Silver 5000/10

Cancel | Save for later

Previous
Next

Required Documents

The Required Documents page displays a comprehensive list of required documents to facilitate complete and accurate self-service submissions.

1. The following documents are required for online New Group Enrollment. Your screen might look slightly different than the screen capture shown below, depending on your region.
 - a. **Membership Enrollment Spreadsheet:** If you did not upload a Membership Enrollment Spreadsheet at the 'Add Employee' screen, upload it here.
 - b. **New Group Broker of Record Authorization:** This replaces the signed new group application and grants authority from your client to act on their behalf. Download and have your client sign it.
 - c. **PGA (Online Account Services) form:** Complete all required fields of the PGA (Online Account Services) form and obtain the signature from your client.
 - d. **First Month's Payment (GA):** Download and complete the EFT or provide a Binder check.
2. Need to download any of the required forms? Use the **Click here** link.

Note: This opens the Help Center in a new tab in your browser. Click the 'Enroll Group' tab to return to the enrollment.
3. Ready to upload documents? Click **Upload Files** or drag and drop your files to the designated area. You can upload individually or as a batch.
4. Made a mistake? Click **Delete document** to remove any unwanted files.

Required Documents

Required Documents

1. Membership Enrollment Spreadsheet
If you did not upload a Membership Enrollment Spreadsheet at the "Add Employee" page, upload it here

1 **2. New Group Broker of Record Authorization form**
Complete all sections of the New Group Broker of Record Authorization form and obtain the signature from your client.

3. PGA (Online Account Services) form
Complete all required fields of the PGA (Online Account Services) form and obtain the signature from your client.
[Click here to access and download your required forms for enrollment.](#)

Upload Documents
For your convenience, you can either merge the documents above for submission or attach each document individually.

Or drop files **3**

Files Uploaded

Broker Authorization Form.pdf **4** Delete document

Cancel Save for later Previous Next

5. When you have finished uploading the required documents, click **Next**.

Attestation

1. Follow the instructions on-screen to complete and sign the Attestation.

Note: Authorized delegates may sign the attestation.

2. In the **Additional Contact** section, enter the contact information for the person whom KP should contact if there are any questions about the submission.

3. Click **Submit** to process your New Group Enrollment.

Note: You can download the completed application in the next screen.

Attestation

Authorized Agent Signature

IMPORTANT INFORMATION - PLEASE READ CAREFULLY
This is an application for coverage only. No contract for coverage will exist until Kaiser Foundation Health Plan, Inc. (KFHP-MAS), or Kaiser Permanente Insurance Company (KPIC) has completed its review and communicated to the business applicant or the applicant's broker that the application has been accepted and a group health plan contract/group policy will be issued.

AUTHORIZED AGENT FOR KAISER PERMANENTE
To be completed by Authorized Agent. To the best of my knowledge and belief, the employment and other information on this application is complete and accurate. I acknowledge that I represent and am acting on behalf of my client and not for, or as, an employee of KFHP-MAS or KPIC. I have explained the benefits and limitations of coverage and advised my client not to terminate any existing coverage until receiving written notice that the coverage being applied for under the new program has been approved. I understand that I have no right to bind this coverage, or to alter terms of the insurance.

*FIRST NAME *LAST NAME TITLE

* Please provide an esignature
You agree that you are submitting an electronic signature, which is the legal equivalent of your written signature for this transaction and will be relied upon as such by all Kaiser Permanente entities

Use your mouse or touchscreen to sign in the space below, or choose "Type Signature" to type your signature in the space below, then click "Save" to continue.

Please create and save your signature before proceeding.

Additional Contact

Who should we contact if we need additional information to complete this submission?

Same as signer

*FIRST NAME *LAST NAME TITLE

*EMAIL *PHONE NUMBER

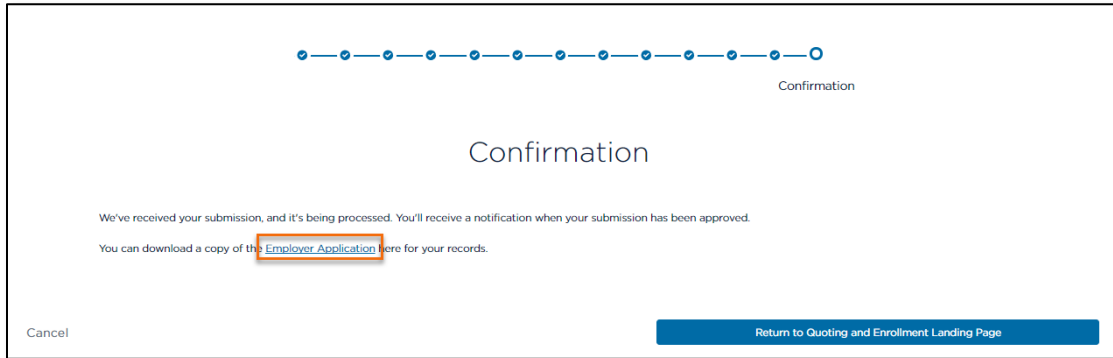
*Preferred contact method
 Email Phone

COMMENTS

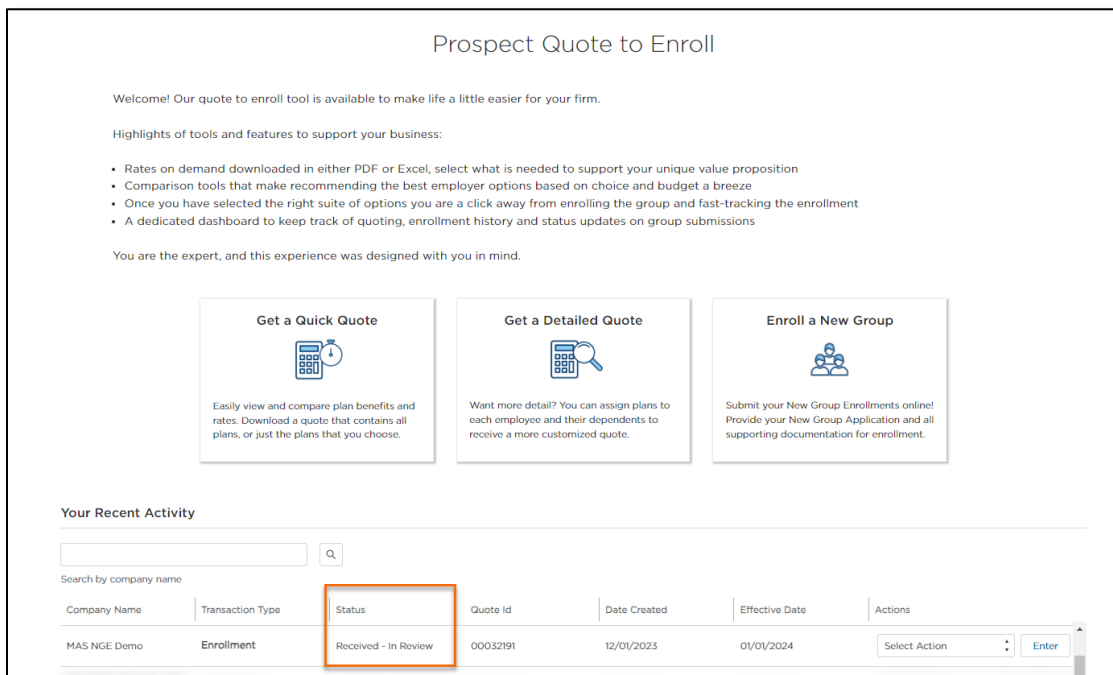
Confirmation

The Confirmation is the final screen of the New Group Enrollment. An email confirmation will be sent to the email address entered in the 'Agent of Record' screen.

1. Click the **Employer Application** link to download the application for your records.
2. Click **Return to Quoting and Enrollment Landing Page**.



3. From the landing page, scroll down to 'Your Recent Activity'.
4. Review the **Status** column. Refer to the table below for status descriptions.



Status:	Description:
<i>In Progress</i>	Application has been started but has not been submitted.
<i>Received - In Review</i>	Application submitted (or resubmitted) to KP intake team. Internal review is being conducted, submitted to QA review.
<i>Action Required</i>	Upon review from intake team, application has been returned to the agent for updates. Note: This status change will be accompanied by communication from the intake and internal teams.
<i>Approved</i>	KP has completed the application, and the Welcome Letter will be sent to the 'Agent of Record' and group 'Contract Signer'.

Save, Edit or Cancel the Enrollment

Save your work for later

1. Each time you click Next during New Group Enrollment, your work is saved. If you are part way through a screen and need to step away, click **Save for later** to save your progress.



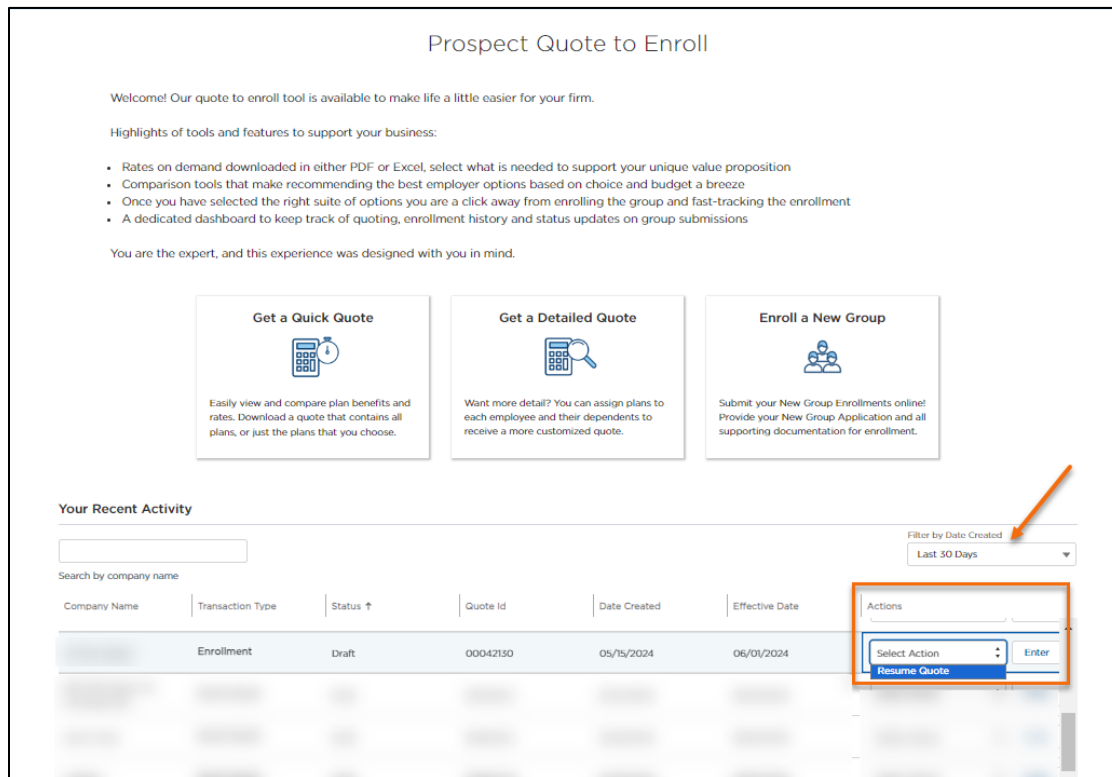
2. To return to where you left off, go to the 'Prospect Quoting and New Group Enrollment' page.
3. Look for 'Your Recent Activity'.
4. **Filter by Date Created**, if needed.

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. Locate the enrollment that you would like to continue.
6. Click the **Actions** drop down and select **Resume Quote**.

Note: Refresh your browser if the saved enrollment does not appear immediately.

7. Click **Enter**.

A screenshot of the 'Prospect Quote to Enroll' page. The page title is 'Prospect Quote to Enroll'. Below the title is a welcome message and a list of highlights. There are 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 and a table. The table has columns for Company Name, Transaction Type, Status, Quote Id, Date Created, and Effective Date. A row is visible with the following data: Enrollment, Draft, 00042150, 05/15/2024, 06/01/2024. To the right of the table is an 'Actions' dropdown menu with a 'Resume Quote' option highlighted. An orange arrow points to the 'Filter by Date Created' dropdown menu, which is set to 'Last 30 Days'.

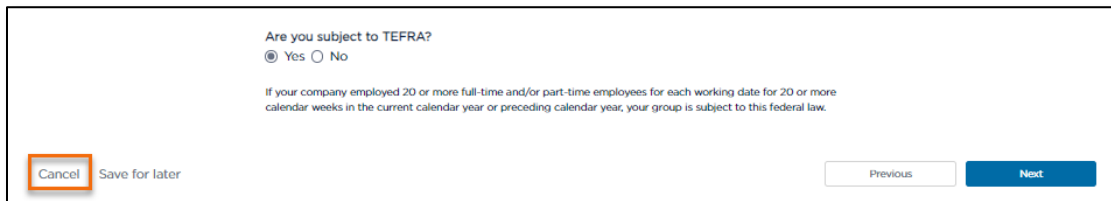
Edit previously completed screens

1. Edit previous screens by clicking the **Previous** button at the bottom of the screen. Allow the previous screen to fully load. Continue this process until you get to the page where you need to make a correction.
2. To return to the most current page, click **Next** and allow the next page to load before clicking Next again.

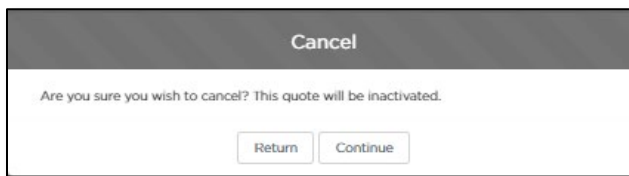


Cancel the New Group Enrollment

1. If you need to cancel a New Group Enrollment, click **Cancel** on any page during the enrollment process.

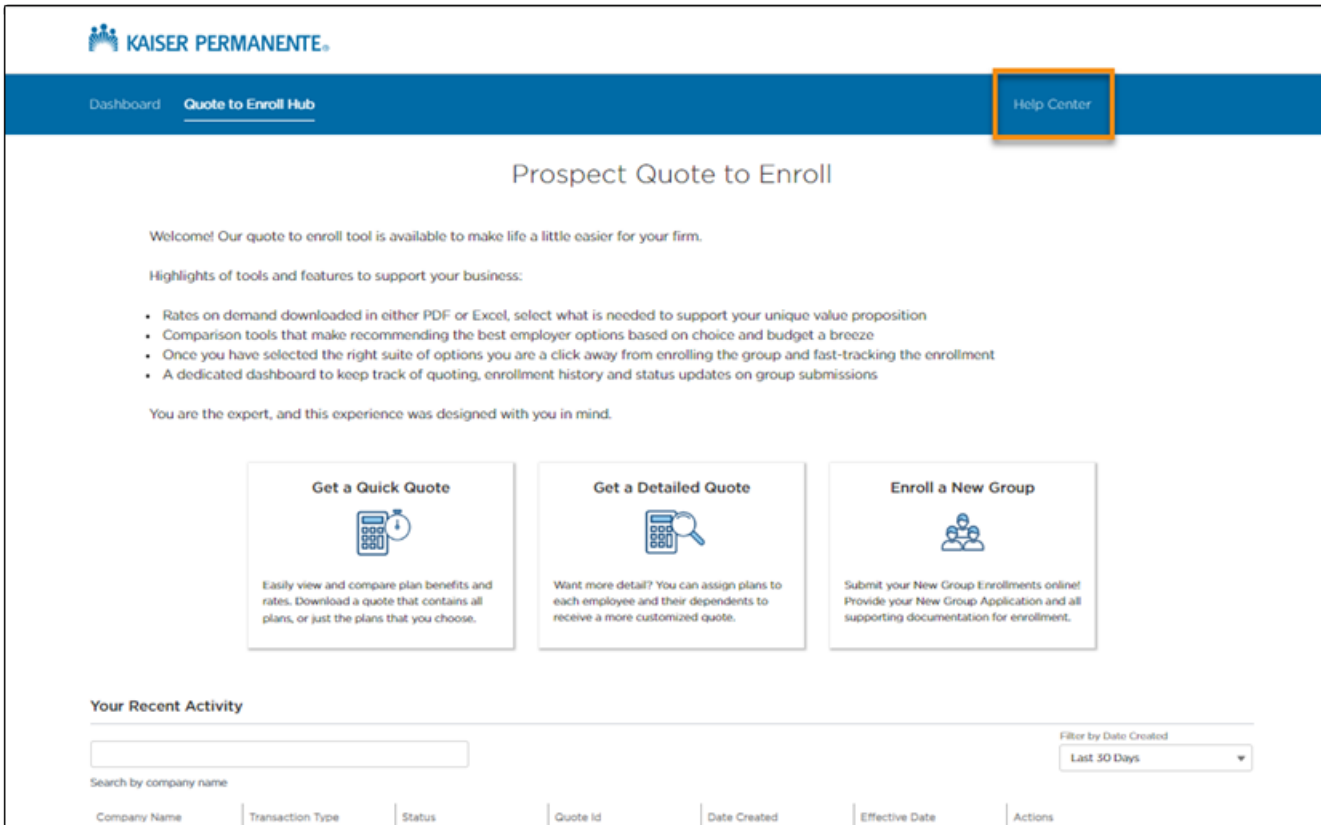


2. Click **Continue** to inactivate the quote.



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 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