

## Self-Service Renewals Overview

Welcome! In this video, we are excited to introduce you to self-service renewals on [account.kp.org](https://account.kp.org), designed for brokers like you.

Where do you find the broker self-service tools? Start by signing in at [account.kp.org](https://account.kp.org).

If you're not already registered, no problem! Click Register, complete the short registration form, and we'll process your request within 24 business hours.

After logging in, you'll land on Your Dashboard. From here, you can:

- view your upcoming renewal documents,
- generate alternate renewal quotes,
- and request plan changes.

### How to Review Upcoming Renewals and Renewal Documents

Renewals will be available 75 days in advance of the renewal effective date. There are a couple of ways you can review renewals starting from Your Dashboard.

To review your group renewals individually, visit the 'Review Your Renewals' section. Select a renewal month tab then click the group link.

This opens the client details page where you can view the upcoming renewal and download the renewal packet.

If you'd like to review all of your upcoming renewals from Your Dashboard, click View all Book of Business.

Check the Upcoming Renewals column. Click the renewals link to open the client details page where you can view the upcoming renewal and download the renewal packet.

### How to Generate an Alternate Renewal Quote

Please note: For certain group types, you'll need to work directly with your account team to obtain alternate renewal quotes.

If you've reviewed the renewal packet and would like alternate renewal options for your group, you can generate an alternate renewal quote.

To generate the alternate renewal quote, start from the group's Client Details page.

Click the "Get Alternate Renewals" link to begin the quote.

Complete the screens of the alternate renewal quote including

- Update the census information
- Compare, add and remove KP medical and dental plans
- Reassign plans to the members

- Add the rating type and contribution details
- Review and download the alternate renewal quote.
- If you need to save the quote at any time during this process, just scroll to the bottom of the page you're on, and click Save for Later.
- If you need to create an additional alternate quote, scroll to the bottom and click Requote.

## **How to Submit Renewal Plan Changes**

Please note: for certain group types you'll need to provide renewal plan change requests to your Kaiser Permanente account team.

After you have reviewed the Alternate Renewal Quote summary, scroll down the page. In the More Options section, click the link to submit a request for renewal plan changes to your Kaiser Permanente team.

Please note: If you've closed out of the quote to review it with your group first, you can still submit it from your alternate renewals dashboard, which we will show you in a second.

Complete all the information in the Submit Renewal Plan Changes screen and then click Submit.

Please note: If you submit a request for renewal plan changes then later need to retract it, please contact your Kaiser Permanente account team for assistance.

## **Manage your Alternate Renewal Quotes**

If you're in the quoting hub, you can click the Alternate Renewals tab to:

- review the status of your alternate renewal quotes,
- resume quotes that you have saved for later,
- and submit renewal plan changes

The options you see in the dropdown menu depends on the status of the quote.

You can also view your Alternate Renewals quotes by clicking "Review and continue Alternate Renewal quotes" from Your Dashboard.

If you need help with renewal packet and quoting questions, the Help Center is just a click away. Check it out for step-by-step instructions and other helpful resources.

You may also contact the Employer and Broker Services Team at [ebs-web-support@kp.org](mailto:ebs-web-support@kp.org) or 855-327-0507 for assistance.

Ready to dive in? Log in at [account.kp.org](http://account.kp.org) to see how these tools can help streamline your quoting process with Kaiser Permanente.