

General Agent Quoting Overview Video

Welcome! In this video, we are excited to introduce the self-service quoting tools on business.kp.org, designed for general agents like you.

First, where do you find the general agent self-service tools?

Start by signing in at business.kp.org.

If you have received an email for delegate access and would like to register for a user ID, [click here](#).

After logging in, you'll land on Your Dashboard.

Meet Quick Quote and Detailed Quote

Both Quick Quote and Detailed Quote give you the flexibility to:

- Model quoting scenarios on demand,
- Download detailed proposals,
- Save your work when you need to step away,
- Create alternate quotes based on data you already entered,
- And convert your quote to an online enrollment when your group is ready to move forward.

No matter which quoting tool you choose, you'll find the process straightforward and user-friendly. Every step is designed to guide you smoothly through the details.

Let's take a closer look at the difference between Quick Quote and Detailed Quote.

Quick Quote is as easy as it gets when your goal is to evaluate all available Kaiser Permanente plans and benefits for your group.

Here's the journey

- Click Get a Quick Quote,
- Fill in basic Group Details,
- add the group Members,
- then In the Quote Summary screen, select a rating type, compare plans, and then download proposals once you've identified the best match for your group.

Detailed Quote gives you are more customized quote that assigns plans to individual members based on their unique needs.

- Click Get a Detailed Quote to begin,
- complete the Group Details
- add Member data,
- select and assign plans to each member,
- choose the rating type

and then review and download the Detailed Quote.

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Want to save your work?

We know work can tug you in different directions, that is why we added a Save for Later feature so you can step away when you need to, and then pick right back up where you left off.

Simply return to 'Your Recent Activity' and select 'Resume' to continue.

Need an alternate quote?

Whether you're working on a Quick Quote, or Detailed Quote, you can easily requote using the same data you already entered.

You can find the requote options under Your Recent activity, and on the bottom of the Quote Summary page when you're at the end of the quoting process.

Ready to dive in? Log in at business.kp.org to see how these tools can help streamline your quoting process with Kaiser Permanente.

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

Also be sure to check out the 'General Agent Self-Service: New Group Enrollment Overview' video while you're there.