02: Generate New Self Service Group Enrollment (MAS)

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Overview

This document will guide you in generating an online New Group Enrollment beginning from the Broker Self Service Portal.

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 enrollment process.

Audience: Brokers

Time to Complete: 20 Min

**Line of Business:** Small Group

Region: MAS

Sales Connect Version: Release 16.6

Where to Locate the Broker Self-Service Tools

The broker self-service tools are accessed from the 'Prospect Quote to Enroll' page in your account.kp.org Dashboard. To get there, follow these steps:

1. Login to account.kp.org.

2. Go to your **Dashboard**.

3. Click the **Get started now** link.
   Note: If you are not currently registered for these self-service tools, you will be directed to complete a short registration form for access. Kaiser Permanente will complete your request within 24 business hours.
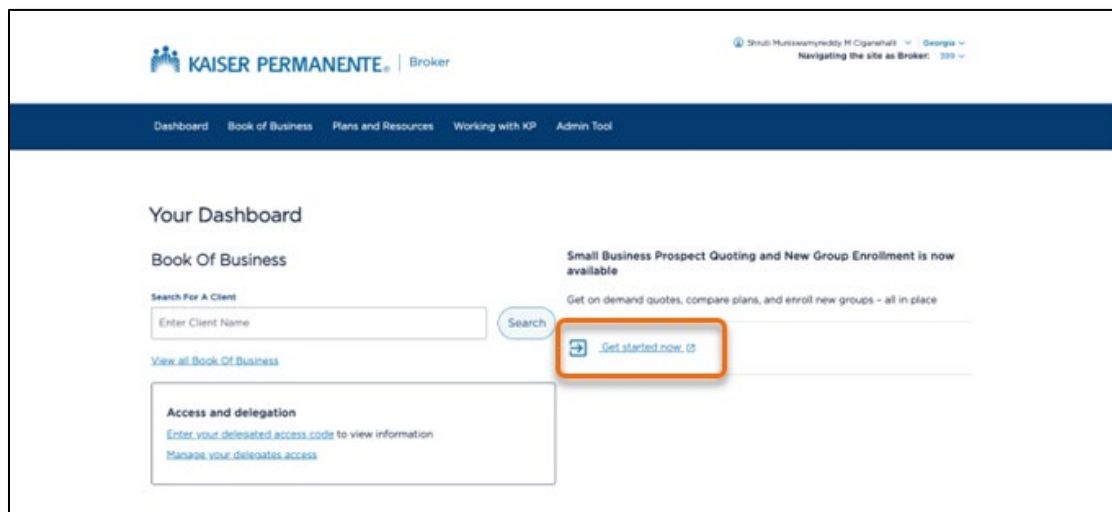
4. The **Prospect Quote to Enroll** page opens.
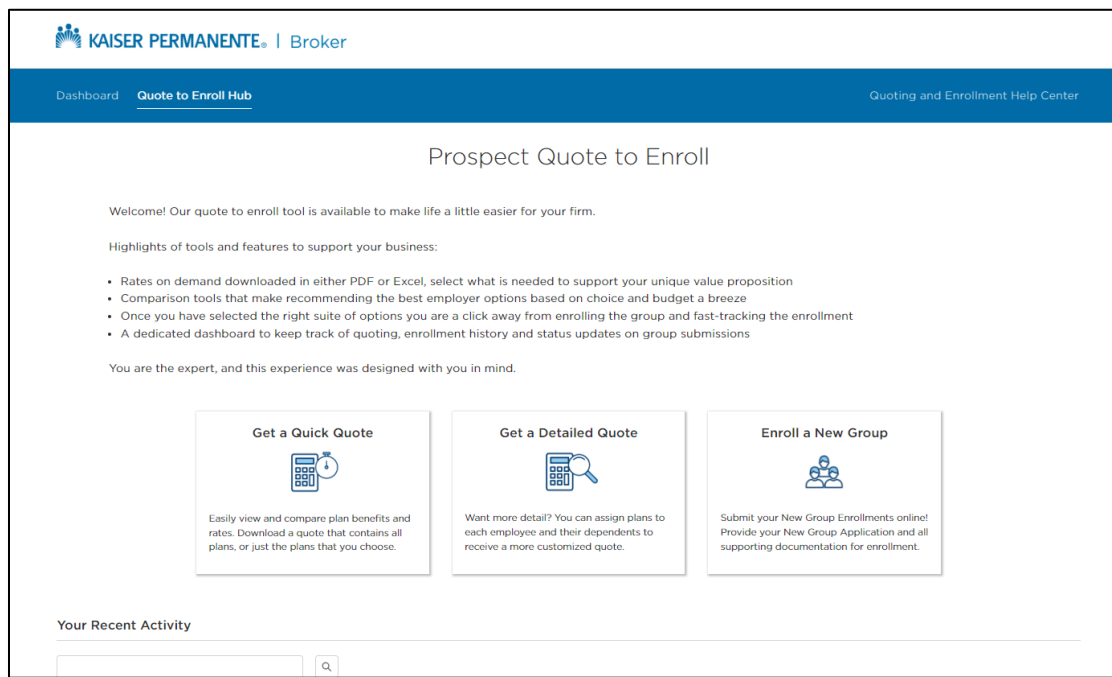
Self-Service for New Group Enrollment

Begin New Group Enrollment

Submit your new group application with supporting documents online and then monitor the progress in real time. **Note:** New Group Enrollment' is not available for 'On Exchange' quotes. For these groups, please email mas-small-group-new-business@kp.org for help.

There are three ways to begin the new group enrollment process:

<u>If you have not previously completed a quote for the group</u>

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

If you have previously completed a 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.

4. Click **Enter**.

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** page, scroll to the bottom.

2. Click **Enroll Group**.

Once you have initiated the New Group Enrollment, you will complete a series of screens, starting with 'Group Details.'

Group Details

Use the Group Details screen to enter the effective date and employer details.

1. Complete or validate the fields in the 'Group Details' screen (* indicates a required field).

   Effective Dates: Effective dates are available for the 1st and 15th of the month.

   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.

Group Eligibility

Enter information about the group's eligibility.

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

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

3. Click **Next** to continue to the 'Contacts' screen.

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 select an appropriate checkbox if the billing contact is "same as contract signer" or "TPA".

3. Click Next.

Confirm Agent of Record

1. Complete the Agent/Broker details.

2. Select the check box if you DO NOT authorize **General Agent** access.

3. Click **Next.**

Add Employees

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

Note: You will upload a completed Kaiser Employee Enrollment Ledger (KEEL) or Employee Enrollment Form near the end of this enrollment process, during the 'Required Documents' screen.

Note: 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.

To upload employees and dependents using the Census Template

1. Click **Download census template**.

2. On your computer, search your Downloads folder for the file **sgBrokerAddSubscribersTemplate**.
3. Open the template in Excel. Do not change the column headers or the order of the tabs- these map directly to the required fields in the quoting tool.
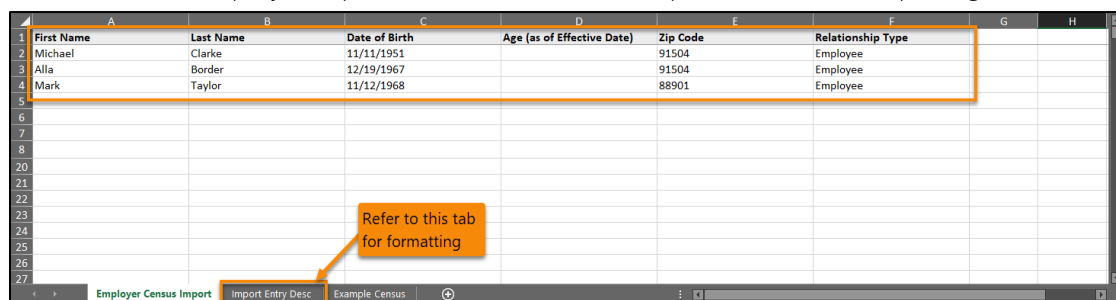
4. Enter employee information to the template (First Name, Last Name, etc.). Refer to the *Import Entry Desc* tab at the bottom of the template for help with formatting the data.

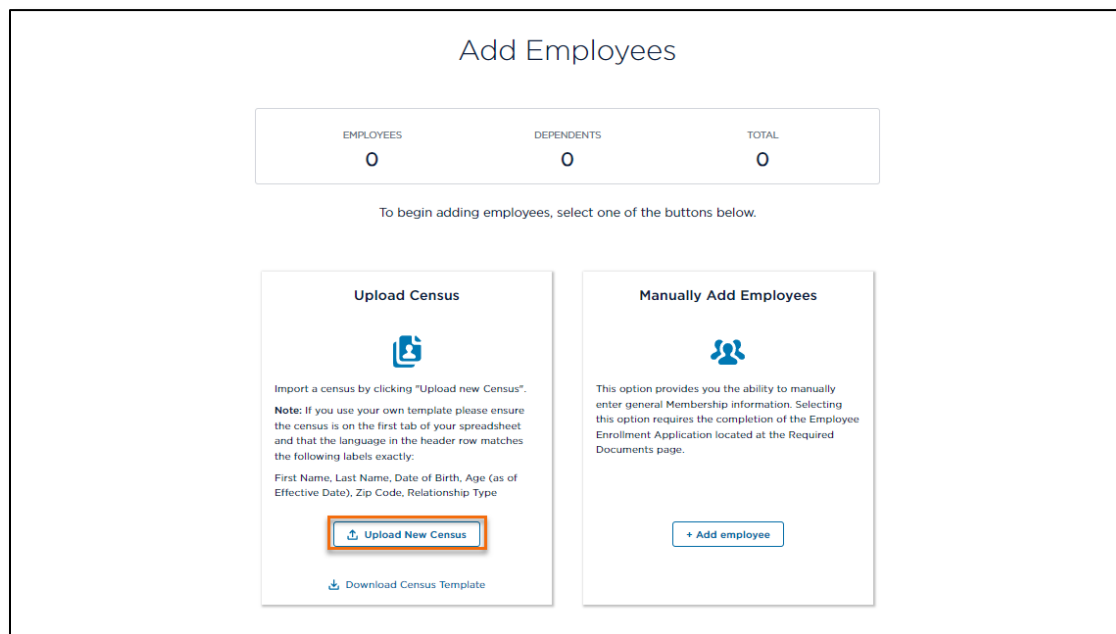**Note:** Date of Birth is required when completing a New Group Enrollment

Note: Enter the employee zip code (not the business zip code) when completing New Group Enrollment.

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

6. 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.

⚠ 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.

7. After the template has uploaded, verify that the totals for **Employees**, **Dependents** and **Total**, match your spreadsheet.

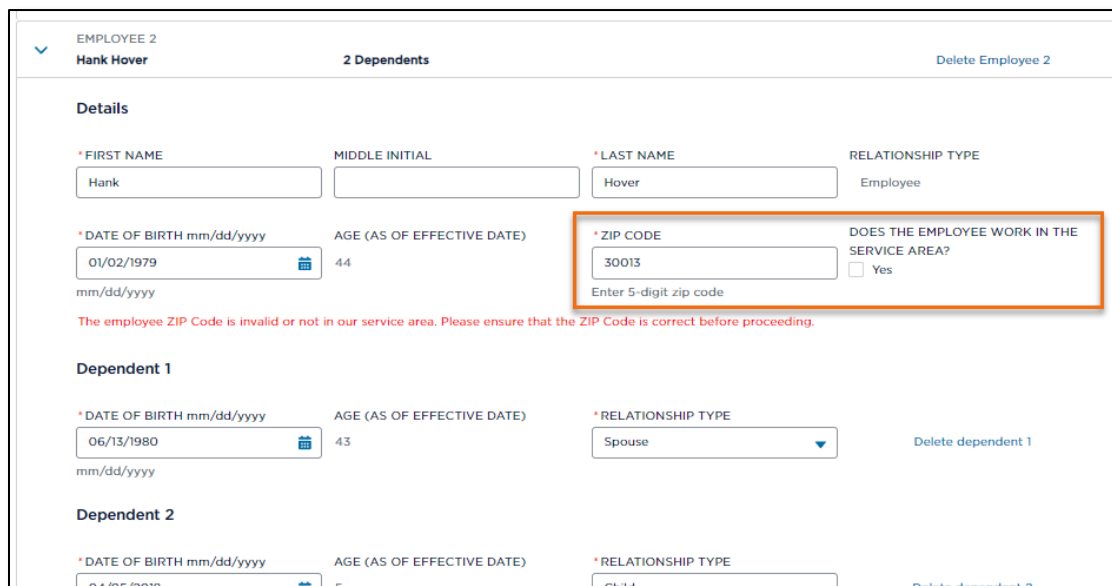8. Scroll down the page to verify or edit the employee data.

   - 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.

Note regarding out of area subscribers:
When a subscriber's zip code is outside the service area, a checkbox appears to confirm if the employee works within the service area.

If more than 49% of subscribers live and work outside of the service area, you will not see a Next button at the bottom of the 'Add Employees' screen, and cannot continue with online group enrollment. Contact your Kaiser Permanente sales representative for help.

9. After you have validated the census details, click **Next** to select medical plans.

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.

   Note: If you are including out of area subscribers, refer to the note on p 12.

4. Click **Add Dependent** to add a dependent.

5. When you have completed manually adding employees, click **Next** to continue to the 'Medical Plan Selection' screen.

Medical Plan Selection

Select all medical plans being offered for enrollment.

- Groups with **1-5 subscribers** may offer a choice of up to 4 HMO plans and 1 Flexible Choice (3TPOS) plan.
- Groups with **6 or more subscribers** may offer a choice of unlimited HMO plans and up to 2 Flexible Choice (3TPOS) plans.

1. Use the **Search** or **Filters** to locate specific plans.
2. Select the check marks for any plans being offered.
3. Scroll to the bottom of the page and click **Next** to continue to 'Dental Plan Selection'.

Dental Plan Selection

1. Check the boxes for up to 2 dental plans <u>or</u> click Next to opt out of dental coverage.

2. Click **Next** to continue to the 'Plan Assignments' screen.

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** employees.

2. Click the **Select a Medical Plan** drop down to select a plan for each employee.

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

Rating Type and Contribution Details

Complete 'Rating Type and Contribution Details' (* indicates a required field).

1. Select the rating type: **Member-Level** or **Composite**

    Note: Member-Level is the default rating type. Composite rating is not available when dental options are offered, or when there are not at least 2 subscribers per plan offered.

2. Complete the contribution details.

3. Click **Next**.

Rate Presentation

1. Review the final rates.

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**.

Rate Presentation

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

Company Name: **MAS NGE Demo**
Effective Date: **01/01/2024**
Zip Code: **21401**
County: **Anne Arundel**
Employee Count: **7**
Member Count: **22**
Rating Type: **Member Level**

TOTAL EMPLOYEE MEDICAL PREMIUM	TOTAL DEPENDENT MEDICAL PREMIUM	TOTAL MONTHLY MEDICAL PREMIUM	TOTAL MONTHLY DENTAL PREMIUM
$4,902.43	$5,166.97	$10,069.40	$230.21

TOTAL MONTHLY PREMIUM : $10,299.61

Medical Rate Details

Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	MEDICAL PLAN	MEDICAL RATE	EMPLOYEE AND DEPENDENT TOTAL
∨ 1. Gordon Ramsey	Employee	58	KP MD Gold 1000/100 RxDed/20/Vision (Select)	$920.06	
	Spouse	55		$805.23	
					$1,725.29
∨ 2. David King	Employee	53	KP MD Platinum 0/10/Vision (Select)	$845.82	
	Spouse	53		$845.82	
					$1,691.64
∨ 3. Mike Hill	Employee	53	KP MD Silver 3000/30/HSA/Vision (Signature)	$561.71	
	Child	6		$210.64	
	Child	6		$210.64	
	Child	6		$210.64	
					$1,193.63
∨ 4. Paul Lamberson	Employee	53	KP MD Gold 1000/100 RxDed/20/Vision (Select)	$736.62	
	Spouse	53		$736.62	
	Child	6		$276.23	
	Child	6		$276.23	
	Child	6		$276.23	
	Child	6		$0.00	
					$2,301.93
∨ 5. David Hall	Employee	53	KP MD Gold 1000/100 RxDed/20/Vision (Select)	$736.62	
	Spouse	43		$490.00	
	Child	6		$276.23	
	Child	6		$276.23	
	Child	6		$276.23	
	Child	6		$0.00	
					$2,055.31

Required Documents

1. The following documents are required for online New Group Enrollment.

   a. Choose one of the following **membership enrollment** methods:

      - Kaiser Employee Enrollment Ledger (KEEL): Upload your KEEL here if you have one.

      - Employee Enrollment Form: Have all employees complete it, and upload it here.

   b. **New Group Broker of Record Authorization:** This form grants you electronic signature authority for the online application. Download and have your client complete it.

   c. **First month's payment:** To finalize enrollment, submit the first month's payment. Choose your method:

      - Electronic Funds Transfer (EFT): Download and complete the EFT form.

      - Binder Check: Provide a copy of your 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. 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.

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

Attestation

1. Fill out all required fields in the Attestation.

   - Authorized delegates may sign the attestation.

   - In the Additional Contacts section, enter an Email or Phone for the person whom KP should contact if there are any questions about the submission.

2. Click **Submit** to process your New Group Enrollment. Download the completed application in the next screen.

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**.
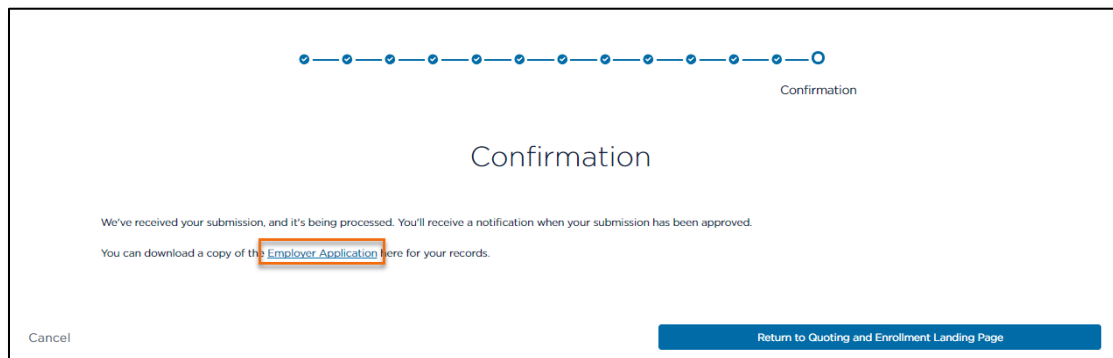
3. From the landing page, scroll down to **Your Recent Activity**.

4. Review the **Status** column. The new application shows a status of 'Received- In Review'. Once KP has completed the application, the status will update to "Completed" and the Welcome Letter will be sent to the 'Agent of Record' and group 'Contract Signer'.
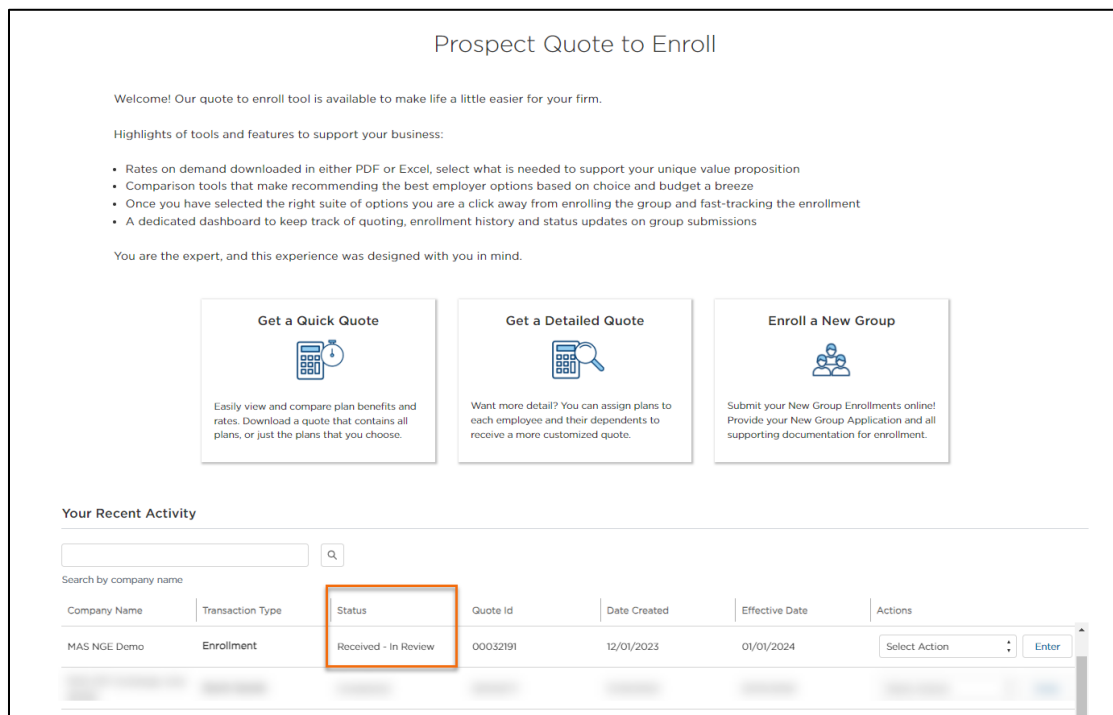
Save, Edit or Cancel the Enrollment

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, return to the 'Prospect Quoting and New Group Enrollment' page.
3. Look for **Your Recent Activity.**
4. Select the **Actions** drop down for the corresponding business name.
5. Select **Resume Quote** and click **Enter**.
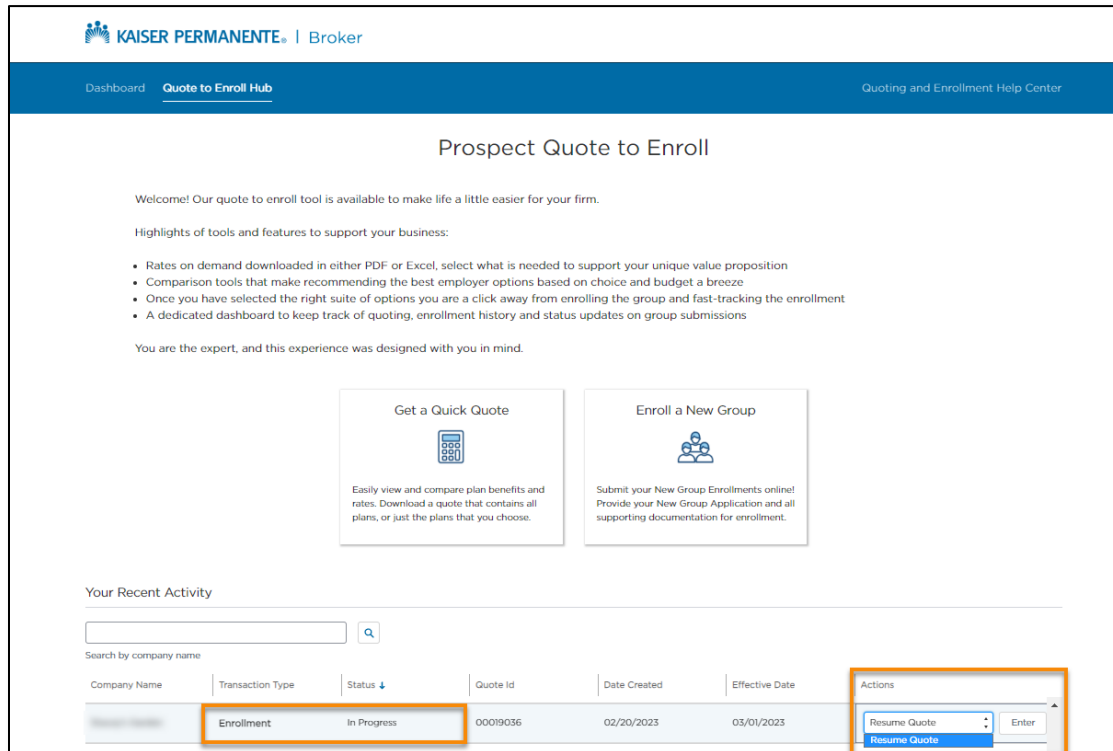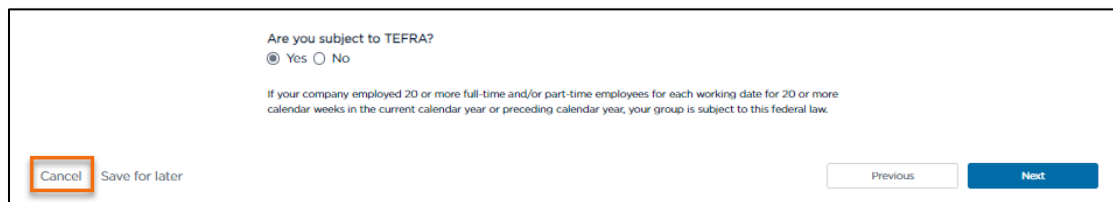
Edit previously completed screens

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.
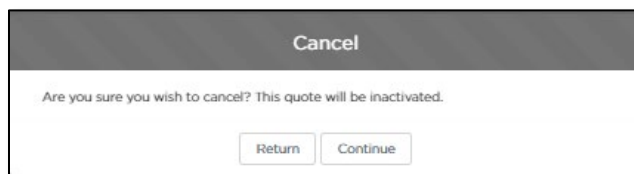

Cancel the New Group Enrollment

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.