



02: Generate New Self Service Group Enrollment (GA/CO/HI)

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Overview

This document will guide you in generating an online New Group Enrollment beginning from the Broker Dashboard in account.kp.org.

Note: The screen captures used in this document are for illustrative purposes only. Your actual experience may vary depending on the application process within your state and the selections you make during the online enrollment process.

Audience: Brokers

Time to Complete: 20 Min

Line of Business: Small Group

Regions: GA, CO, HI

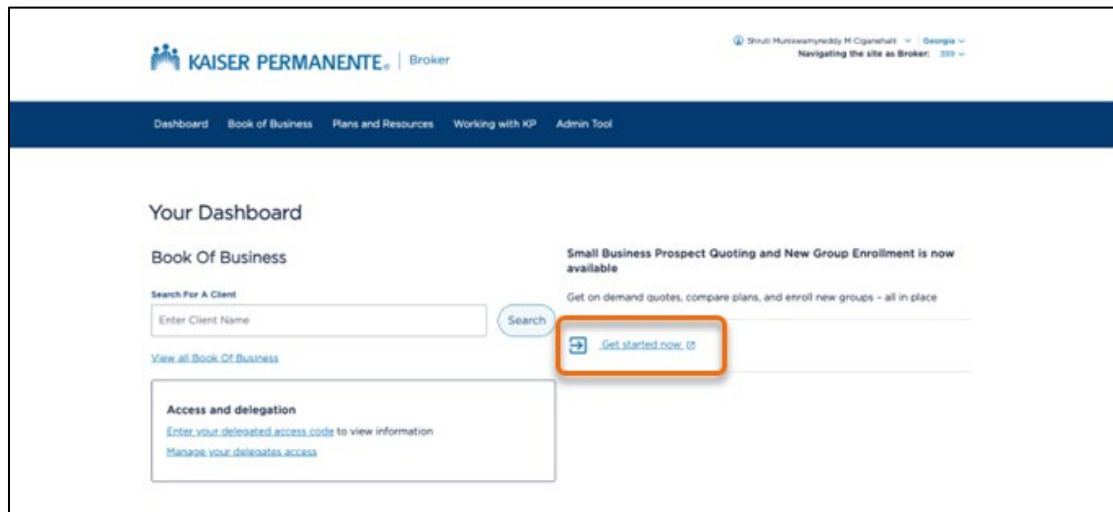
Sales Connect Version: Release 16.7

Where to Locate the Broker Self-Service Tools

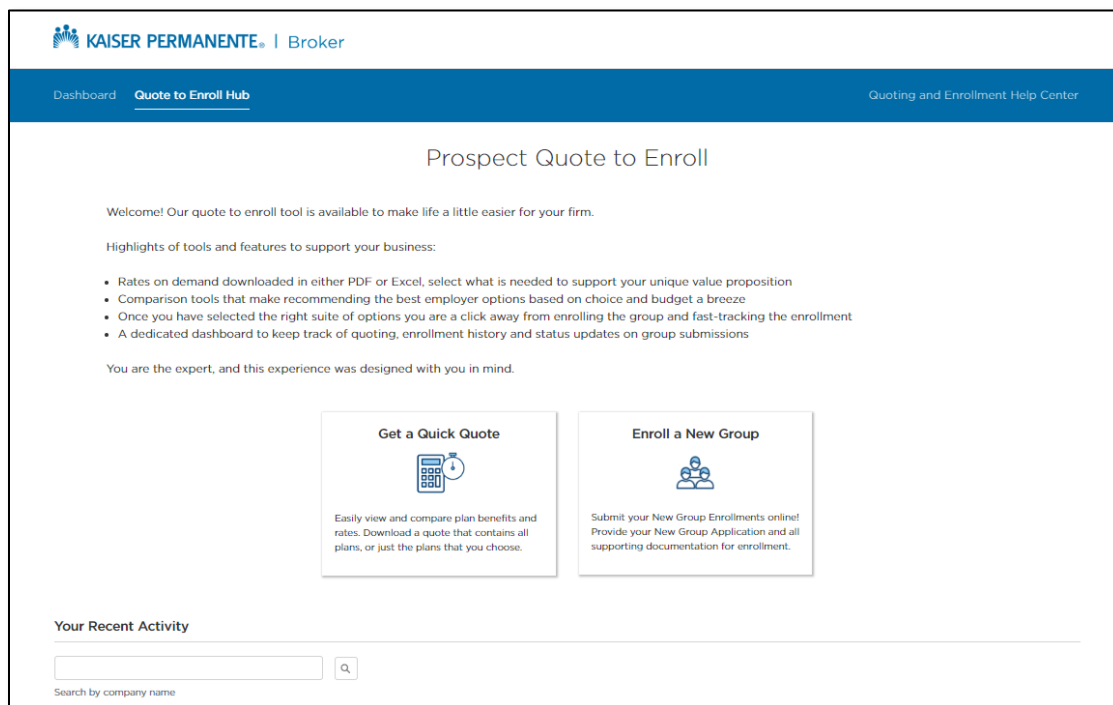
The broker self-service tools are accessed from the 'Prospect Quote to Enroll' page in your account.kp.org Dashboard. To get there, follow these steps:

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.



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** 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.

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 CO Test	Enrollment	In Progress	00032232	12/05/2023	01/01/2024	Select Action <input type="button" value="Enter"/>
QG	Quick Quote	Draft	00032230	12/05/2023	01/01/2024	Select Action <input type="button" value="Enter"/>

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**.

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

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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-CO-HI QQ Demo	Quick Quote	Completed	00032246	12/05/2023	01/01/2024	<div> Select Action Resume Quote Convert to Buy Requote </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** page, scroll to the bottom.
2. Click **Enroll Group**.

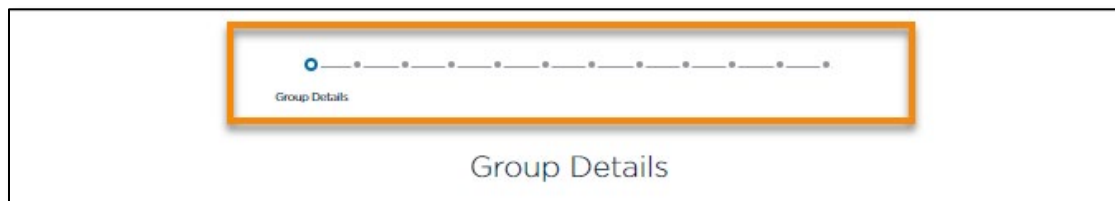
Number of employees at the rate:	2 employees	2 employees	1 employee	2 employees	
<input type="checkbox"/> KP MD Silver Virtual Forward 3000 (Signature)	\$441.59	\$883.18	\$861.10	\$1,302.69	\$6,116.07

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

What would you like to do next?

Enroll Group
 Requote this group

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

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)..

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 you have clicked 'Next' on this page.

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.

*Indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING
Georgia

*REQUESTED EFFECTIVE DATE
Jan 01 2024

Plans and rates are based on the proposed effective date.

About your business

*LEGAL BUSINESS NAME
GA CO-HI QG Demo
(as stated on your local business license, quarterly wage and tax report, corporate or partnership documents)

DOING BUSINESS AS (DBA) (OPTIONAL)

*PHYSICAL STREET ADDRESS (NO P.O. BOXES)
123 Main St

*CITY
Atlanta

*STATE
GA

*ZIP
30033

*COUNTY
DeKalb

*PHONE
(123) 456-7890

BUSINESS WEBSITE

*TYPE OF BUSINESS
Corporation

*IN BUSINESS SINCE (MM-DD-YYYY)
12-02-2014

*FEDERAL TAX ID (EIN) NUMBER
999999999

4 DIGIT SIC CODE
or
6 DIGIT NAICS CODE
999999
Visit naics.com/search to determine your code.

Workers' compensation

* All employees must be covered by workers' compensation, unless not required to be covered by law. You're not eligible to apply for coverage if you don't have workers' compensation, unless you're exempt. I attest that the following information is correct.

☐ Yes, my company has workers' compensation
☒ Pending
☐ Exempt from providing workers' compensation

*IF YES OR PENDING, NAME OF CARRIER
Aetna

*POLICY # (INDICATE UNKNOWN OR PENDING AS APPLICABLE)
PENDING

Cancel Save for later **Next**

Enter Group Eligibility

Enter information about the group's eligibility.

1. Complete all required fields (* indicates a required field).
2. **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.

The screenshot shows a web form titled "Group Eligibility". At the top, there is a legend: "* Indicates required field". The form is divided into several sections:

- 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
- Eligible and enrolling employees**
 - * TOTAL NUMBER OF ELIGIBLE EMPLOYEES
 - * TOTAL NUMBER OF ENROLLING EMPLOYEES
 - * HOURS PER WEEK EMPLOYEES MUST WORK TO BE ELIGIBLE FOR COVERAGE
 - * Are you offering dependent coverage?
☒ Yes ☐ No

3. 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.

This screenshot shows the bottom portion of the form. It includes a question: "Are you subject to TEFRA?" with radio button options for "Yes" and "No". Below this is a paragraph of text explaining the TEFRA rule: "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." At the bottom, there are four buttons: "Cancel", "Save for later" (which is highlighted with an orange border), "Previous", and "Next".

4. Click **Next** to continue.

Contacts

Enter information about the group's contacts.

1. Enter the contract signer's information. The contract signer 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

HI Brokers: You will see a checkbox to indicate if you'd prefer to receive contracts via mail rather than account.kp.org.

Contract Delivery Preference

We'll deliver your Kaiser Foundation Health Plan, Inc. (KFHP)/Kaiser Permanente Insurance Company (KPIC) contact(s) online in a PDF file at account.kp.org unless you indicate below that you'd like your contact(s) mailed to you.

☐ I want to receive my contact(s) by mail

CO Brokers: 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. Complete the Agent/Broker details.
2. Select the check box if you DO NOT authorize **General Agent** access.
3. Click **Next**.

Confirm Agent of Record

*Indicates required field

* AGENT/BROKER FIRST NAME	* AGENT/BROKER LAST NAME	
<input type="text"/>	<input type="text"/>	
* PREFERRED PHONE	EXT	* EMAIL
<input type="text"/>	<input type="text"/>	<input type="text"/>
* FIRM NAME	NATIONAL PRODUCER NUMBER NPN	* KAISER PERMANENTE BROKER FIRM ID
<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

[Cancel](#) [Save for later](#) [Previous](#) [Next](#)

Add Employees

Use the 'Add Employees' screen to add employees and their dependents. There are three methods for entering this information. **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.

Method 1: Upload the Membership Enrollment Spreadsheet

When you 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. **Note:** You are required to provide either the Membership Enrollment Spreadsheet or Employee Enrollment Forms to complete your submission.

Hawaii Brokers: You will not see the option to 'Upload a Membership Enrollment Spreadsheet' on this screen. Please use 'Upload Census' or 'Manually Add Employees' to input employee information. Your sales representative will get in touch with you after the online enrollment process to discuss additional enrollment requirements, including Employee Enrollment Forms.

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, a message states: 'To begin adding employees, select one of the buttons below.' There are three main options, each with an icon, a description, and a button:

- Upload Membership Enrollment Spreadsheet** (highlighted with an orange border): Includes a spreadsheet icon, a description about downloading and importing an Excel file, a button 'Upload New Spreadsheet', and a link 'Download Enrollment Spreadsheet Template'.
- Upload Census**: Includes a census icon, a description about importing a census, a note about template requirements, a list of required labels (First Name, Last Name, Date of Birth, Age, etc.), a button 'Upload New Census', and a link 'Download Census Template'.
- Manually Add Employees**: Includes a group of people icon, a description about manually entering information, and a button '+ Add employee'.

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

Note: If you already have a complete Membership Enrollment worksheet, please ensure that the 'Enrolling Employees' tab is the first tab, as shown in the image below.

Region Code	Group Number	Subgroup	Billgroup	EE SSN	Person SSN	Person Relationship	Person Last Name	Person First Name
CO				Employee	155118191	EMP	trigger	one
				Employee	123546798	EMP	trigger	two

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

Method 2: Upload employees and dependents using the Census Template

- Click **Download census template**.

Add Employees

EMPLOYEES
0

DEPENDENTS
0

TOTAL
0

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

Upload Membership Enrollment Spreadsheet

This option gives you the ability to download and import an excel file with all Membership information needed to enroll instead of the Employee Enrollment form.

[Upload New Spreadsheet](#)

[Download Enrollment Spreadsheet Template](#)

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.

[+ Add employee](#)

- On your computer, search your Downloads folder for the file **sgBrokerAddSubscribersTemplate**.
- 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.

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

- 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.

First Name	Last Name	Date of Birth	Age (as of Effective Date)	Zip Code	Relationship Type
Michael	Clarke	11/11/1951		91504	Employee
Alla	Border	12/19/1967		91504	Employee
Mark	Taylor	11/12/1968		88901	Employee

- Save the spreadsheet in a designated folder/location on your PC.
- Return to the 'Add Employees' page, click **Upload New Census** and upload the census from your computer.

Add Employees

EMPLOYEES
0

DEPENDENTS
0

TOTAL
0

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

Upload Membership Enrollment Spreadsheet

This option gives you the ability to download and import an excel file with all Membership information needed to enroll instead of the Employee Enrollment form.

[Upload New Spreadsheet](#)

[Download Enrollment Spreadsheet Template](#)

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.

[+ Add employee](#)

[Previous](#)

Cancel



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.

Method 3: Manually add employees and dependents

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

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

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

Upload Membership Enrollment Spreadsheet

This option gives you the ability to download and import an excel file with all Membership information needed to enroll instead of the Employee Enrollment form.

[Upload New Spreadsheet](#)

[Download Enrollment Spreadsheet Template](#)

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.

[+ Add employee](#)

[Previous](#)

Cancel

2. Type employee information into the fields.
3. Click **Add Employee** for each additional employee.

Note: If you are adding out of area employees, refer to page 16 for information about out of area.

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

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
1	0	1

[Upload New Census](#) [+ Add employee](#) **3**

Expand All | Collapse All [Download census details](#) | [Delete all employees](#)

EMPLOYEE 1
John Doe 0 Dependents [Delete Employee 1](#)

Details **2**

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

*DATE OF BIRTH mm/dd/yyyy: 01/24/1973 AGE (AS OF EFFECTIVE DATE): ZIP CODE: 21401

[+ Add dependent](#) **4**

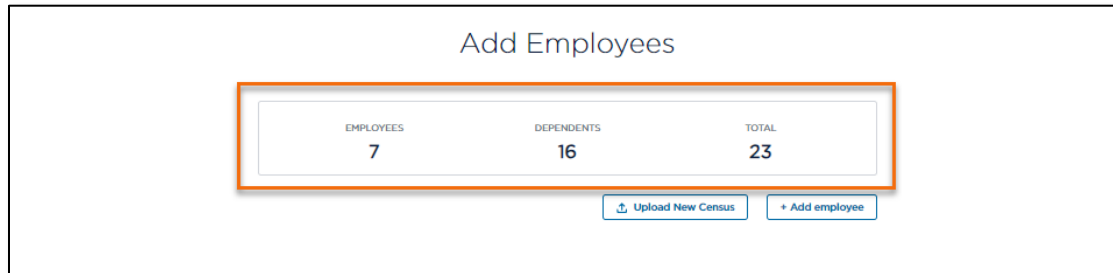
Save Subscribers [+ Add employee](#) **3**

[Previous](#) [Next](#)

Validate the 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.

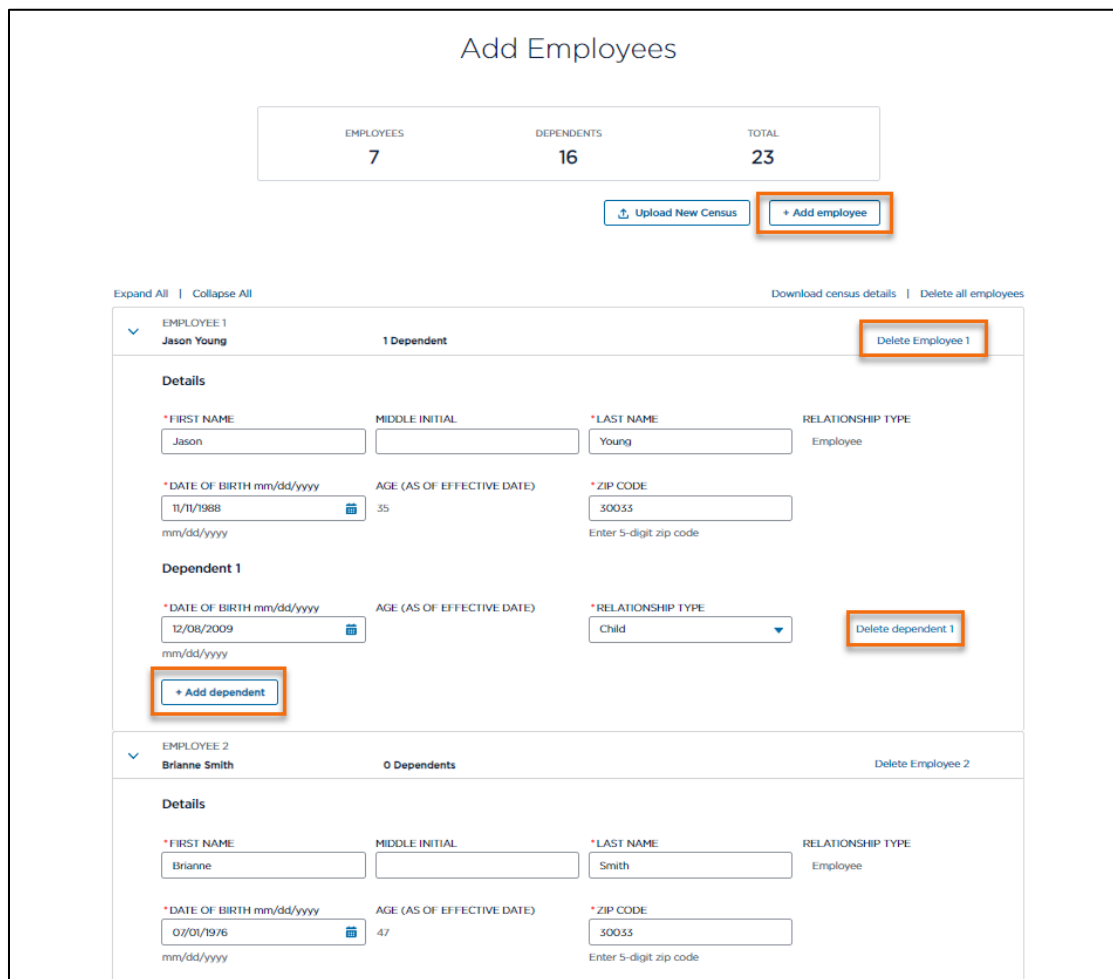


The screenshot shows a summary box titled "Add Employees". Inside the box, there is a table with three columns: EMPLOYEES, DEPENDENTS, and TOTAL. The values are 7, 16, and 23 respectively. Below the table are two buttons: "Upload New Census" and "+ Add employee".

EMPLOYEES	DEPENDENTS	TOTAL
7	16	23

[Upload New Census](#) [+ Add employee](#)

2. 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.



The screenshot shows the "Add Employees" page with two employee entries. The first entry is for "Jason Young", who has 1 dependent. The second entry is for "Brianne Smith", who has 0 dependents. Each entry has a "Details" section with fields for first name, middle initial, last name, relationship type, date of birth, age, and zip code. There are also buttons for "Delete Employee", "Delete dependent", and "+ Add dependent".

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
7	16	23

[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: Jason MIDDLE INITIAL: LAST NAME: Young RELATIONSHIP TYPE: Employee

* DATE OF BIRTH mm/dd/yyyy: 11/11/1988 AGE (AS OF EFFECTIVE DATE): 35 * ZIP CODE: 30033
mm/dd/yyyy Enter 5-digit zip code

Dependent 1

* DATE OF BIRTH mm/dd/yyyy: 12/08/2009 AGE (AS OF EFFECTIVE DATE): * RELATIONSHIP TYPE: Child [Delete dependent 1](#)
mm/dd/yyyy

[+ Add dependent](#)

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

Details

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

* DATE OF BIRTH mm/dd/yyyy: 02/01/1976 AGE (AS OF EFFECTIVE DATE): 47 * ZIP CODE: 30033
mm/dd/yyyy Enter 5-digit zip code

3. Check for out of area zip codes.

CO and GA Brokers:

When a subscriber's zip code is outside the service area, a checkbox appears to confirm if the employee works within the service area. When an employee lives and works outside of the service area, they must enroll in a KP Out of Area PPO plan or PPO plan (depending on the region). GA Brokers please contact your Kaiser Permanente sales representative for help.

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	DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
11/11/1988	35	30000	<input checked="" type="checkbox"/> Yes
mm/dd/yyyy		Enter 5-digit zip code	

The employee ZIP Code is invalid or not in our service area. Employees who live and work outside of our service area must enroll in an out of area PPO plan. If you are interested in obtaining a quote including out of area plan rates, contact Kaiser Permanente for help.

CO and GA Brokers: If more than 49% of 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.

Details

* FIRST NAME	MIDDLE INITIAL	* LAST NAME	RELATIONSHIP TYPE
Jane		Doe	Employee
* DATE OF BIRTH mm/dd/yyyy	AGE (AS OF EFFECTIVE DATE)	* ZIP CODE	DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
05/04/1970	53	81407	<input type="checkbox"/> Yes
mm/dd/yyyy		Enter 5-digit zip code	

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

+ Add dependent

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

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

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.

The screenshot shows the 'Plan Selection' interface. At the top, there are two lines of text: 'Groups with 1-5 subscribers may offer a choice of up to 4 HMO, DHMO, HSA and Plus plans, and 1 POS or PPO plan.' and 'Groups with 6 or more subscribers may offer a choice of unlimited HMO, DHMO, HSA and Plus plans, and up to 2 POS or PPO plans.' Below this is a note: '"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.'

On the left side, there is a 'SEARCH' section with a text input field and a magnifying glass icon. Below it is a 'PRODUCT TYPE' section with checkboxes for HMO, DHMO, DHMO Select, DHMO Plus, HSA, HSA Plus, 3T POS, 3T POS Deductible, PPO, HMO Select, and HSA Select. Further down is a 'METAL TIERS' section with checkboxes for Platinum, Gold, Silver, and Bronze. At the bottom left is a 'NETWORK' section with checkboxes for Standard and Select, and an 'Apply Filters' button.

On the right side, there are three sections of plans: 'HMO', 'DHMO', and 'DHMO Select'. Each section has a list of plans with checkboxes. In the 'HMO' section, 'KP CO Platinum 0/10 RX Copay' is selected. In the 'DHMO' section, 'KP CO Gold 500/25' is selected. In the 'DHMO Select' section, 'KP Select CO Bronze 7000/60 RX Copay' is selected.

Numbered callouts are present: '1' points to the top text, '2' points to the search field, and '3' points to the 'KP CO Gold 500/25' checkbox.

4. Click **Next** to continue.

This screenshot shows the bottom portion of the plan selection screen. It features a section titled 'Plus Deductible' with a list of plans and checkboxes: 'KP Gold 1000/20/30/S10 KP Plus', 'KP Gold 2500/0/30/S10 KP Plus', 'KP Silver 2700/35/50/S10 KP Plus', and 'KP Silver 3700/35/50/S10 KP Plus'. Below this list is a note: 'The Dual Choice PPO plans are fully underwritten by Kaiser Permanente Insurance Company (KPIC), a subsidiary of Kaiser Foundation Health Plan (KFHP), Inc.'

At the bottom left, there are 'Cancel' and 'Save for later' links. At the bottom right, there are 'Previous' and 'Next' buttons. The 'Next' button is highlighted with an orange border.

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 displays the 'Plan Assignments' interface. At the top, a header reads 'Plan Assignments'. Below it, a instruction states: 'Please choose plans for each employee listed below. When plan assignments are complete, select Next.' The interface is divided into two main sections. The top section contains a search bar labeled 'SEARCH EMPLOYEES' with a magnifying glass icon and a 'SORT EMPLOYEES' dropdown menu. The bottom section shows a list of employees, with the first one, 'Employee: Michael Clarke', highlighted. Below the employee name, a table lists their details: FIRST NAME (Michael), LAST NAME (Clarke), DATE OF BIRTH (11/11/1951), AGE AT EFFECTIVE DATE (71), and ZIP CODE (30033). Below the table, there is a dropdown menu labeled '*SELECT A MEDICAL PLAN' with the text 'Select a medical plan...' and two options: 'KP Platinum Q/Q/20/S10' and 'KP Gold Q/Q/30/S10'. The second employee, 'Employee: Alta Border', is partially visible at the bottom.

3. 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).

Note: Member-Level is the default Medical Rating Type.

Note for Hawaii Brokers: You will not complete the contribution details. When enrolling a HI group with composite rating, contact your HI sales representative.

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).
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: KP
QQ Co
Effective Date: 2023-02-01
Zip Code: 30012
County: Rockdale
Employee Count: 5
Member Count: 9
Rating Type: Member Level

TOTAL EMPLOYEE PREMIUM




\$5,956.37

TOTAL DEPENDENT PREMIUM



\$1,481.44

TOTAL MONTHLY PREMIUM



\$7,437.81

Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	MEDICAL PLAN	MEDICAL RATE	EMPLOYEE AND DEPENDENT TOTAL
1.	Employee	71	KP GOLD Q/Q/SQ/SIO	\$1,435.96	\$1,435.96
2.	Employee	65	KP GOLD Q/Q/SQ/SIO	\$1,435.96	\$1,435.96
3.	Employee	64	KP GOLD Q/Q/SQ/SIO	\$1,435.96	\$1,435.96
4.	Employee	55	KP GOLD Q/Q/SQ/SIO	\$1,067.40	
	Spouse	51		\$892.69	\$1,960.09
5.	Employee	54	KP GOLD Q/Q/SQ/SIO	\$581.09	
	Spouse	56		\$588.75	
	Child	12		\$0.00	
	Child	5		\$0.00	
					\$1,169.84

Total Employee Premium \$5,956.37
Total Dependent Premium \$1,481.44
Total Monthly Premium \$7,437.81

Your Kaiser Permanente Portfolio

Employer offering (placeholder text)

MEDICAL PLANS

KP Gold Q/Q/SQ/SIO

Cancel Save for later

Previous Next

Required Documents

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. **Hawaii Brokers:** You will only submit the Broker Record of Authorization form online. Your sales representative will follow up to discuss next steps within 48 hours of submitting this online enrollment.
 - a. **Membership Enrollment Spreadsheet/Employee Enrollment Form (GA and CO):** If you did not upload a Membership Enrollment Spreadsheet at the 'Add Employee' screen, upload either the Membership Enrollment Spreadsheet or the Employee Enrollment Form here.
 - b. **New Group Broker of Record Authorization (GA, HI and CO):** This replaces the signed new group application and grants authority from your customer to act on their behalf. Download and have your client complete it.
 - c. **PGA (Online Account Services) form (GA and CO):** 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/Employee Enrollment Form**
If you did not upload a Membership Enrollment Spreadsheet at the "Add Employee" page, upload it here, download the Employee Enrollment form, and have all enrolling employees from your company complete, sign and date.
- 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 Service) form**
Complete all required fields of the PGA (Online Account Services) form and obtain the signature from the client.
- 4. First month's payment**
To Complete enrollment, we need the first month's payment. Download and complete the Electronic Check Transfer (EFT) form or provide a copy of a Binder check.

Upload Documents

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

[Upload Files](#) Or drop files

Files Uploaded

Broker Authorization Form.pdf [Delete document](#)

[Cancel](#) [Save for later](#) [Previous](#) [Next](#)

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 the Email or Phone for the person whom KP should contact if there are any questions about the submission. If you are an authorized delegate, complete this section with your contact information.
1. Click **Submit** to process your New Group Enrollment. Download the completed application in the next screen.

Attestation

Authorized Agent/Broker of Record Signature

IMPORTANT INFORMATION - PLEASE READ CAREFULLY

This is an application for coverage only. No contract for coverage will exist until Kaiser Foundation Health Plan of Colorado (KFHPCO), 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/BROKER OF RECORD FOR KAISER PERMANENTE

To be completed by broker. To the best of my knowledge and belief, 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 Kaiser Foundation Health Plan, or KPIC. I've 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

Jane Doe

* 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.

Draw Signature Type Signature

Save Clear

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

email@email.com (123) 456-7890

*Preferred contact method

☒ Email ☐ Phone

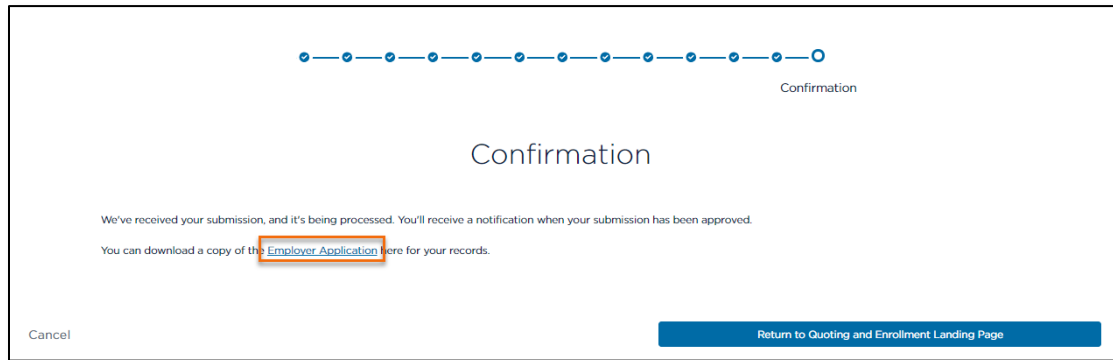
COMMENTS

Cancel Save for later Previous Submit

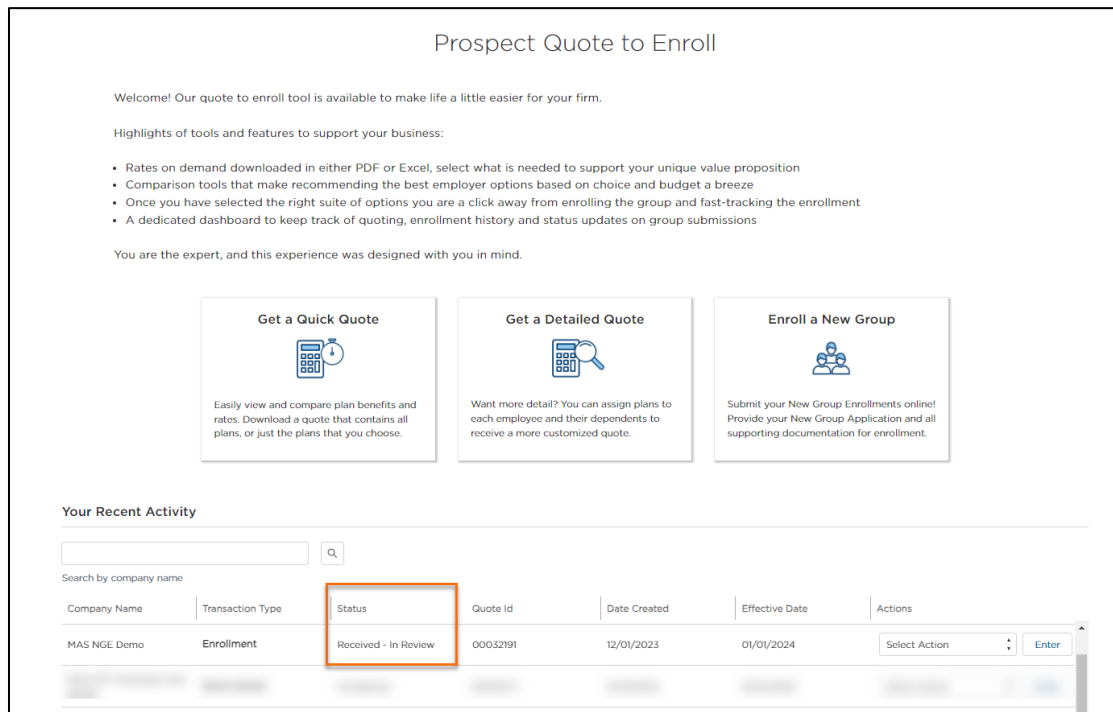
Confirmation

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.



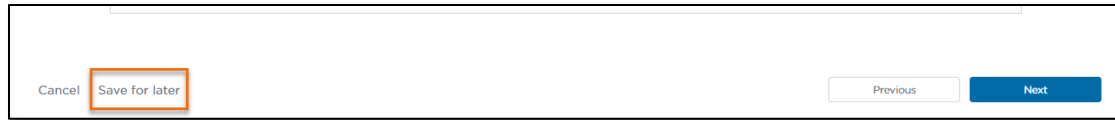
3. From the landing page, scroll down to **Your Recent Activity**.
4. Review the **Status** column. The new application shows a status of 'Received- In Review'. Once KP has completed the application, the status will update to "Completed" and the Welcome Letter will be sent to the 'Agent of Record' and group 'Contract Signer'.



Save, Edit or Cancel the Enrollment

Save your work for later

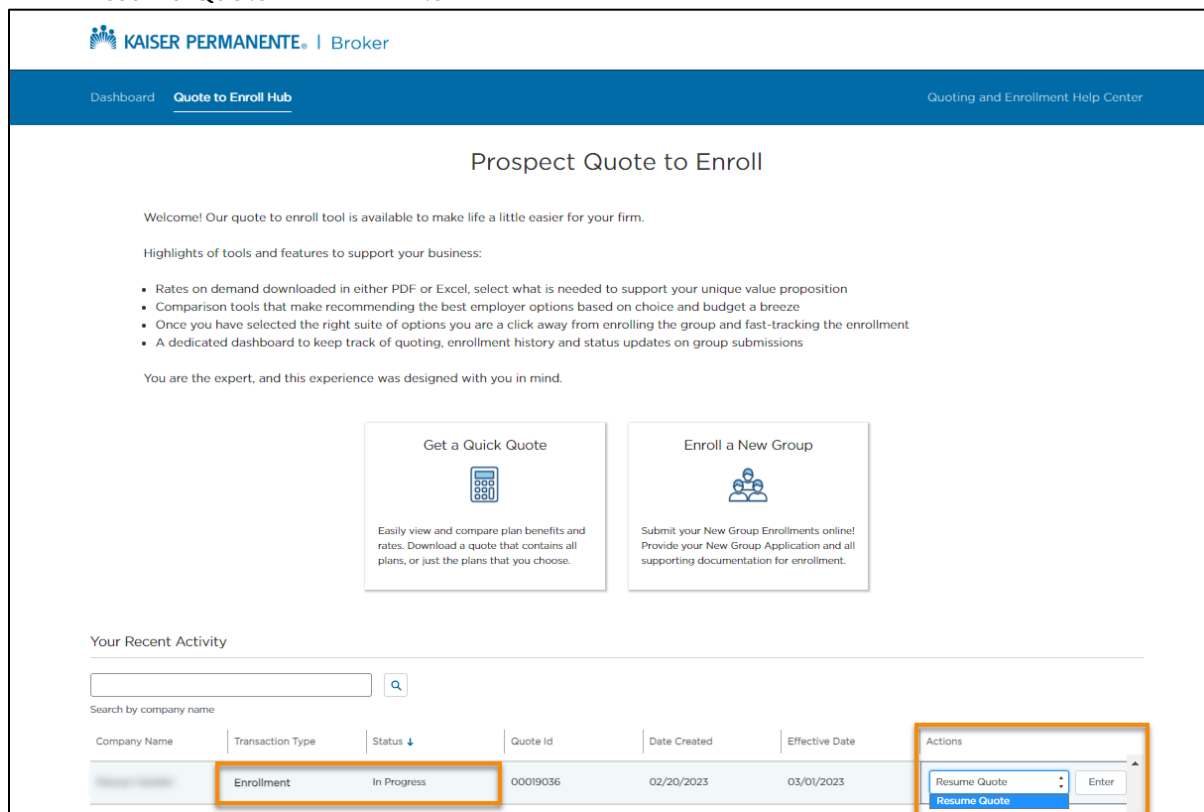
1. Each time you click Next during New Group Enrollment, your work is saved. If you are part way through a screen and need to step away, click **Save for later** to save your progress.



2. To return to where you left off, go 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.

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

5. Select **Resume Quote** and click **Enter**.

A screenshot of the Kaiser Permanente 'Prospect Quote to Enroll' dashboard. The page has a blue header with the Kaiser Permanente logo and 'Broker' text. Below the header is a navigation bar with 'Dashboard' and 'Quote to Enroll Hub' (the latter is underlined). On the right of the navigation bar is a link to 'Quoting and Enrollment Help Center'. The main content area is titled 'Prospect Quote to Enroll'. It includes a welcome message, a list of tool highlights, and two main action cards: 'Get a Quick Quote' and 'Enroll a New Group'. Below these is a section titled 'Your Recent Activity' with a search bar. A table follows, showing activity for a company named 'Enrollment' with status 'In Progress'. The table has columns for Company Name, Transaction Type, Status, Quote Id, Date Created, and Effective Date. The 'Enrollment' row is highlighted with an orange box. To the right of the table, an 'Actions' dropdown menu is open, showing 'Resume Quote' as the selected option, with an 'Enter' button next to it. The 'Resume Quote' option and the 'Enter' button are also highlighted with an orange box.

Edit previously completed screens

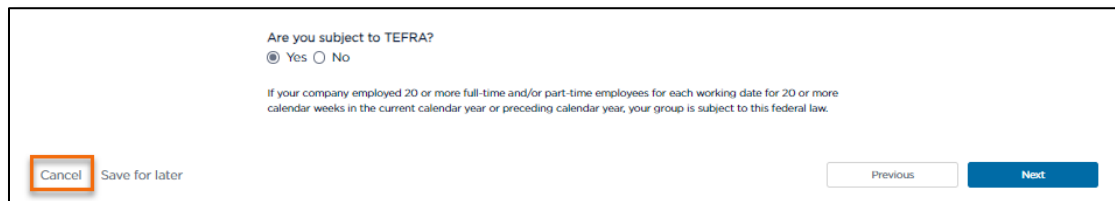
1. Edit previous screens by clicking the **Previous** button at the bottom of the screen. Allow the previous screen to fully load. Continue this process until you get to the page where you need to make a correction.
2. To return to the most current page, click **Next** and allow the next page to load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



A screenshot of a form's footer area. On the left, there are two links: "Cancel" and "Save for later". On the right, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with an orange border.

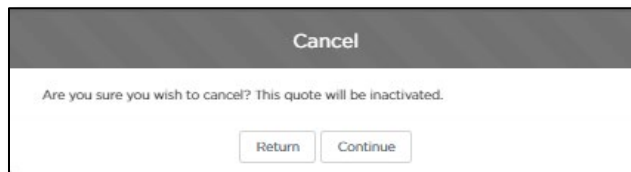
Cancel the New Group Enrollment

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



A screenshot of a form titled "Are you subject to TEFRA?". It has radio buttons for "Yes" (selected) and "No". Below this is a paragraph of text: "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." At the bottom left, there is a "Cancel" button highlighted with an orange border, and a "Save for later" link. At the bottom right, there are "Previous" and "Next" buttons.

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



A screenshot of a "Cancel" confirmation dialog. The title bar says "Cancel". The main text asks: "Are you sure you wish to cancel? This quote will be inactivated." At the bottom, there are two buttons: "Return" and "Continue".