



01: Generate a Self-Service Quick Quote or Detailed Quote

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Overview

This document describes the steps for generating a 'Quick Quote' or a 'Detailed Quote'. These quoting tools are available to KP Brokers through the broker portal, account.kp.org.

Audience: Brokers

Time to Complete: 20 Min

Line of Business: Small Group

Region: MAS

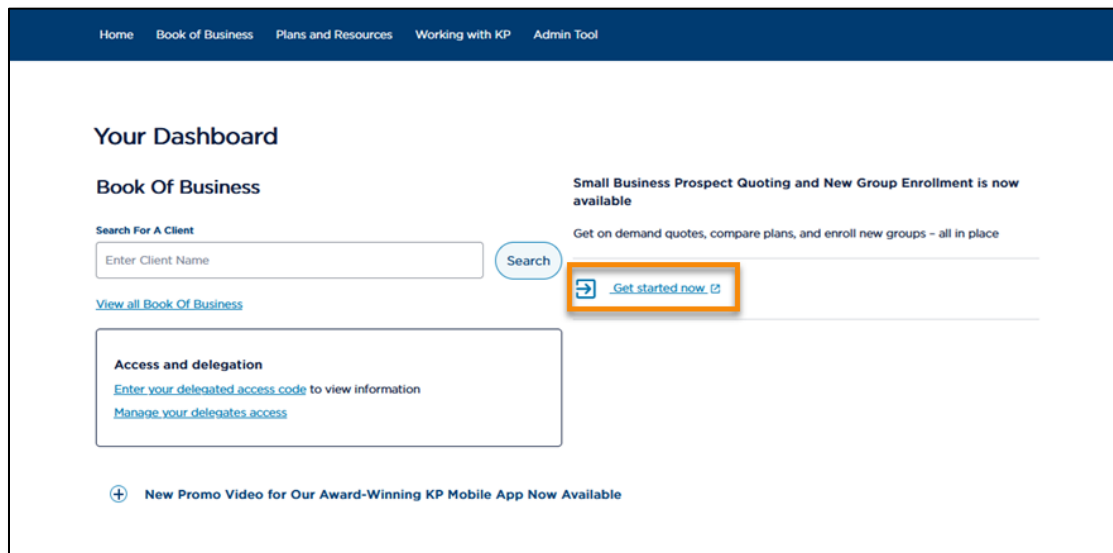
Sales Connect Version: Release 17.1

Where to Locate the Broker Self-Service Tools

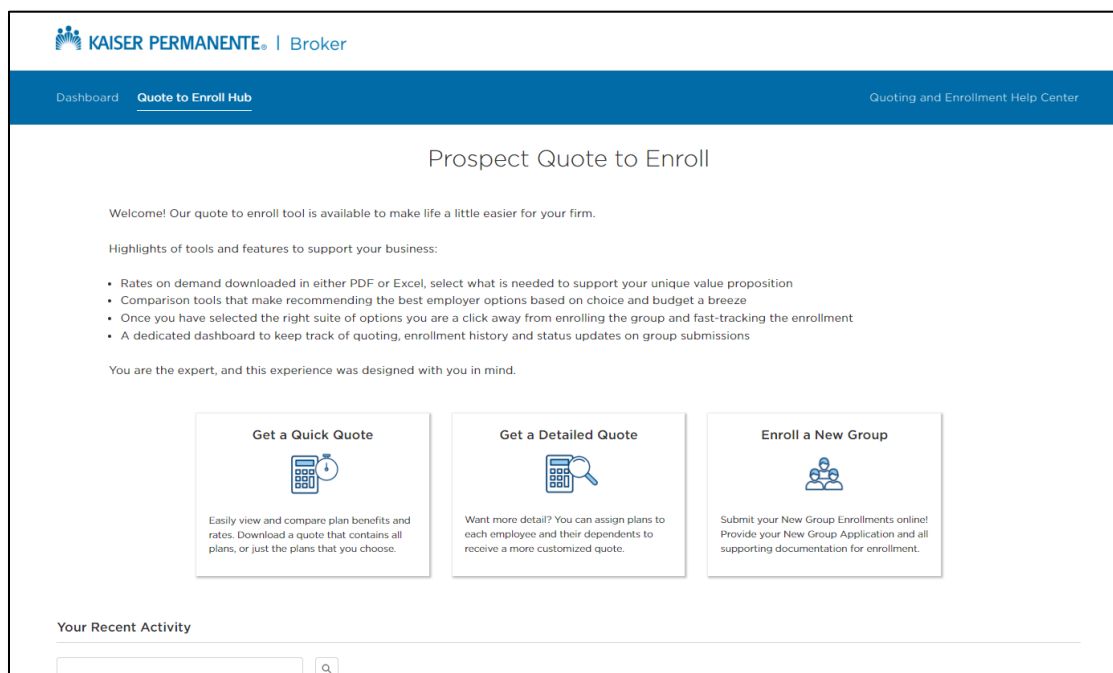
The broker self-service tools are accessed from the 'Prospect Quote to Enroll' page in your account.kp.org Dashboard. To get there, follow these steps:

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.

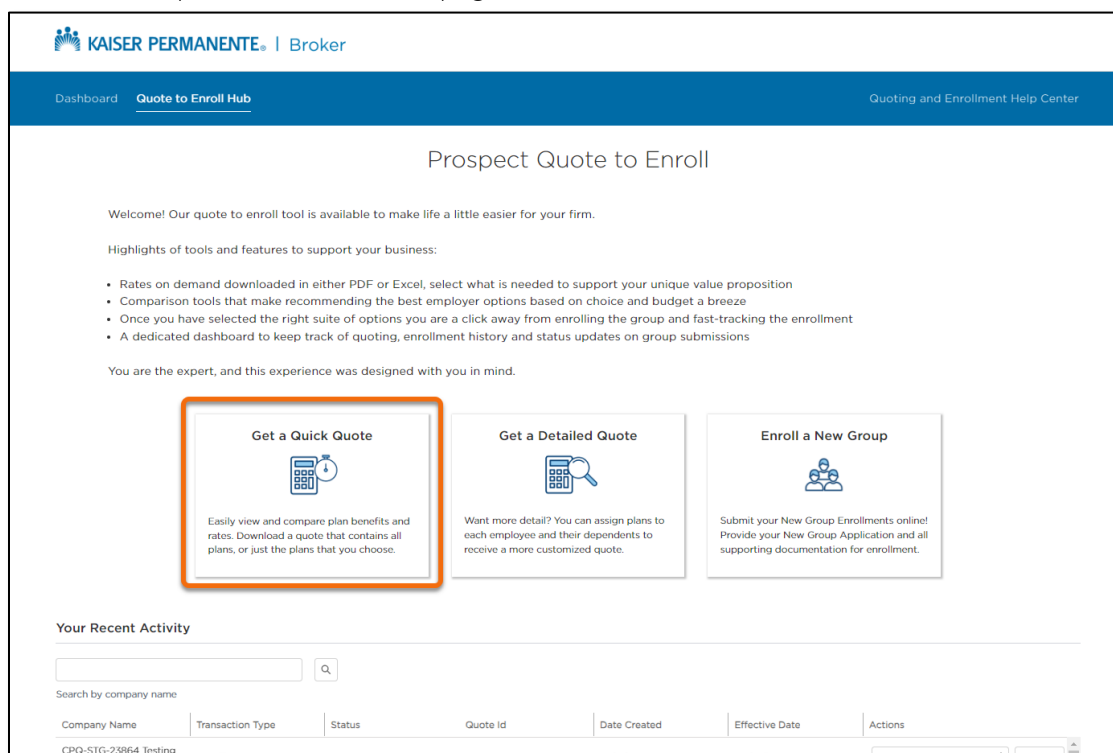


Generate a Quick Quote

Quick Quote is a fast and simple quoting tool that assumes all members are on the same plan. For a more tailored quote with medical and dental plan assignments, see [Generate a Detailed Quote](#).

Begin a Quick Quote

1. From the 'Prospect Quote to Enroll' page, click **Get a Quick Quote**.



Group Details

In the 'Group Details' screen, enter basic information about the group you are preparing the quote for.

1. Complete all required fields(*).

Note the following:

- a. **On Exchange (SHOP) or Off Exchange:**

- i. To quote for SHOP plans and rates, select 'On Exchange'. The workflow is the same as 'Off Exchange' with the following exceptions:

- Composite Rates are not available.
- Dental rates are not available.
- "Click to buy" for New Group Enrollment is not available. For assistance with New Group Enrollment, contact mas-small-group-new-business@kp.org

- ii. Off Exchange is not available in DC.

- b. **Physical Address Zip:** Rates are based on the group's zip code and county. Be sure to enter a zip code for the service area that matches your log in.

2. Click **Next** to continue to the 'Add Employees' screen.

Group Details

Company Information

* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING
Mid-Atlantic States

*THIS GROUP IS QUOTING
☒ Off Exchange ☐ On Exchange

*LEGAL BUSINESS NAME

The legal company name is the name as stated on your local business license, quarterly wage and tax report, corporate or partnership documents.

*QUOTE EFFECTIVE DATE

Plans and rates are based on the proposed effective date.

TOTAL NUMBER OF EMPLOYEES (FULL-TIME AND PART-TIME)

*HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

*PHYSICAL ADDRESS ZIP *COUNTY

Rates are based on the group's ZIP Code and county.

*Are any employees eligible for Medicare or on Medicare, either through age or disability?
☐ Yes ☒ No

Employer Company Contact

FIRST NAME	MIDDLE INITIAL	LAST NAME
<input type="text"/>	<input type="text"/>	<input type="text"/>

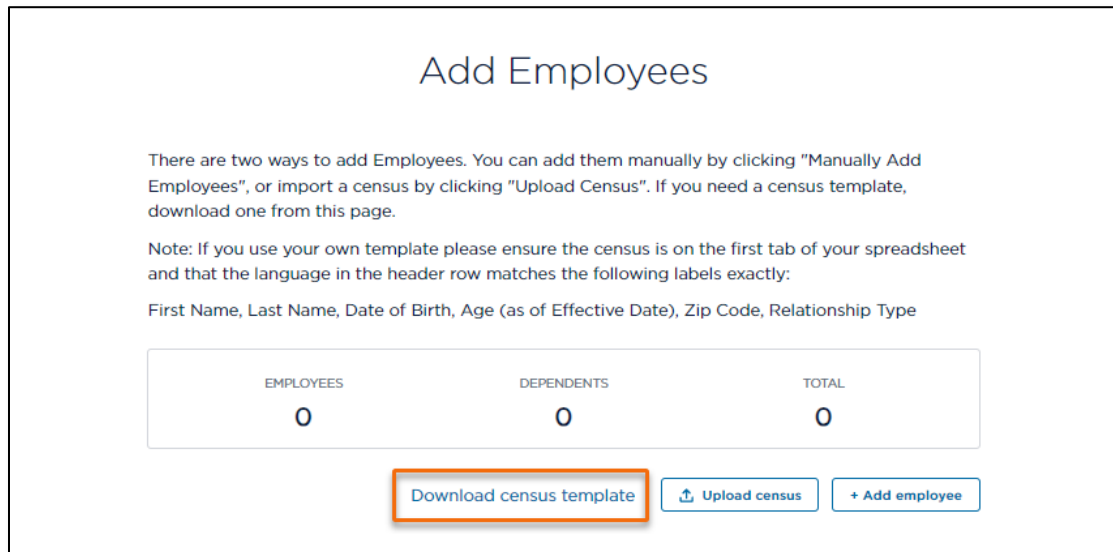
Add Employees

Use the 'Add Employees' screen to add subscribers. 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: If you use your own census template, please ensure the census is on the first tab of your spreadsheet and that the headers match the census template shown below.

Upload employees and dependents using the Census Template

1. Click **Download census template**.



Add Employees

There are two ways to add Employees. You can add them manually by clicking "Manually Add Employees", or import a census by clicking "Upload Census". If you need a census template, download one from this page.

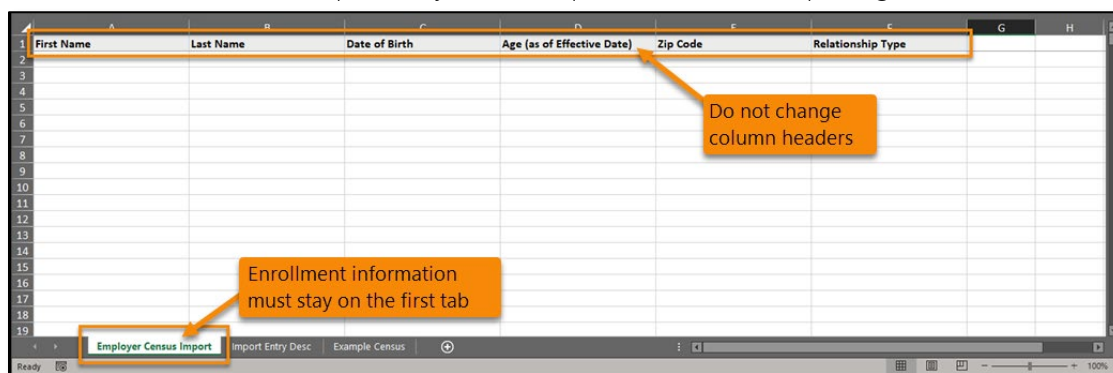
Note: If you use your own template please ensure the census is on the first tab of your spreadsheet and that the language in the header row matches the following labels exactly:

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

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

[Download census template](#) [Upload census](#) [+ Add employee](#)

2. On your computer, search your Downloads folder for the file **sgBrokerAddSubscribersTemplate**.
3. Open the template in Excel and review the column headers. Do not change the column headers or the order of the tabs- these map directly to the required fields in the quoting tool.



Do not change the column headers or tabs in the census template, as they will map directly to the required fields in the quoting tool when the completed spreadsheet is uploaded.

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: You may enter either *Date of Birth* or *Age at Effective Date* for Quick Quoting; however, the subscriber's *Date of Birth* is required when completing a Detailed Quote or New Group Enrollment

Note: You may use the group's home zip code for Quick Quoting; however, you will need the employee zip when you proceed to the New Group Enrollment.

1	A	B	C	D	E	F	G	H
	First Name	Last Name	Date of Birth	Age (as of Effective Date)	Zip Code	Relationship Type		
2	Michael	Clarke	11/11/1951		91504	Employee		
3	Alla	Border	12/19/1967		91504	Employee		
4	Mark	Taylor	11/12/1968		88901	Employee		
5								
6								
7								
8								
20								
21								
22								
23								
24								
25								
26								
27								

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

Add Employees

There are two ways to add Employees. You can add them manually by clicking "Manually Add Employees", or import a census by clicking "Upload Census". If you need a census template, download one from this page.

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

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

[Download census template](#) [Upload census](#) [+ Add employee](#)



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

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

EMPLOYEES	DEPENDENTS	TOTAL
7	15	22

8. Scroll down the page to verify or edit the employee data. Edit employee/dependent information by typing into the fields, or use the **Delete Employee** and **Add Dependent** buttons, as needed.

Expand All | Collapse All Download census details | Delete all employees

EMPLOYEE 1
Jason Young 0 Dependents Delete Employee 1

Details

* FIRST NAME MIDDLE INITIAL * LAST NAME RELATIONSHIP TYPE
Jason Employee

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * ZIP CODE
11/11/1990 34 21404
mm/dd/yyyy Enter 5-digit zip code

+ Add dependent

EMPLOYEE 2
Brienne Smith 0 Dependents Delete Employee 2

Out of Service Area: When an employee's zip code is outside the service area, a checkbox appears to confirm if the employee works within the service area.

EMPLOYEE 1
Jason Young 0 Dependents Delete Employee 1

Details

* FIRST NAME MIDDLE INITIAL * LAST NAME RELATIONSHIP TYPE
Jason Employee

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * ZIP CODE
11/11/1988 35 80014
mm/dd/yyyy Enter 5-digit zip code

DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
☐ Yes

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

9. Scroll to the bottom of the page and click **Next** to generate the Quote.

To manually enter employees

1. From the 'Add Employees' screen, click **Add Employee**.
2. Type employee information into the fields.
3. Click **Add Dependent** to add a dependent under the Employee.
4. Click **Add Employee** for each additional employee.
5. When you have completed manually adding employees, click **Next** to generate the quote.

Add Employees

There are two ways to add Employees. You can add them manually by clicking "Manually Add Employees", or import a census by clicking "Upload Census". If you need a census template, download one from this page.

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

EMPLOYEES	DEPENDENTS	TOTAL
1	0	1

[Download census template](#) [Upload new census](#) [+ Add employee](#)

Expand All | Collapse All

Download census details | Delete all employees

EMPLOYEE 1
Jane Doe
0 Dependents
Delete Employee 1

Details

*FIRST NAME
Jane

MIDDLE INITIAL

*LAST NAME
Doe

RELATIONSHIP TYPE
Employee

*DATE OF BIRTH mm/dd/yyyy
08/09/1965
mm/dd/yyyy

AGE (AS OF EFFECTIVE DATE)

*ZIP CODE
21401
Enter 5-digit zip code

[+ Add dependent](#)

Save Subscribers

[+ Add employee](#)

Previous

Next

Quote Summary

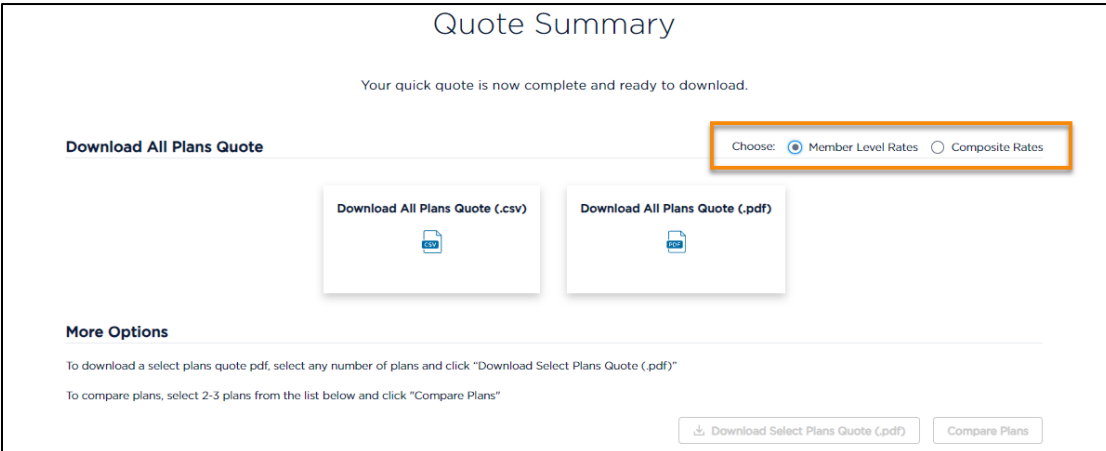
The quote is generated once you arrive at the 'Quote Summary' screen. Here you can review details for all plans, or you can select specific plans.

Note: 'On Exchange' plan offering does not fully align with 'Off Exchange' plan offering. Keep in mind that the rates you see on your screen are based on information you've entered and the selections you've made while quoting.

Select how to view rate information

1. Click the radio button for either **Member Level Rates** (MLR) or **Composite Rates***. This selection determines how information is presented on the screen (see examples below).

Note: Composite Rates are not available when quoting for 'On Exchange'.



The screenshot displays the 'Quote Summary' interface. At the top, it states 'Your quick quote is now complete and ready to download.' Below this, there is a section titled 'Download All Plans Quote'. To the right of this section, there is a 'Choose:' label with two radio buttons: 'Member Level Rates' (which is selected) and 'Composite Rates'. Below the 'Download All Plans Quote' section, there are two buttons: 'Download All Plans Quote (.csv)' and 'Download All Plans Quote (.pdf)'. Further down, there is a 'More Options' section. It contains two instructions: 'To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"' and 'To compare plans, select 2-3 plans from the list below and click "Compare Plans"'. At the bottom right of the 'More Options' section, there are two buttons: 'Download Select Plans Quote (.pdf)' and 'Compare Plans'.

a. Example with *Member Level Rates* button selected:

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote

Choose: ☒ Member Level Rates ☐ Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

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

[View Dental Plans](#)

SEARCH

Search by plan name

PRODUCT TYPE

- ☐ HMO
- ☐ HMO Plus
- ☐ DHMO
- ☐ DHMO Plus
- ☐ HSA
- ☐ Added Choice Deductible
- ☐ Virtual Complete
- ☐ Flexible Choice
- ☐ Flexible Choice Deductible
- ☐ Flexible Choice HSA
- ☐ Virtual Forward

HMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Signature)	See Rate Details	\$3,909.01	\$4,951.49	\$8,860.50
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Select)	See Rate Details	\$4,104.35	\$5,198.92	\$9,303.27
<input type="checkbox"/> KP MD Gold Q/20/Vision (Signature)	See Rate Details	\$3,614.41	\$4,578.33	\$8,192.74
<input type="checkbox"/> KP MD Gold Q/20/Vision (Select)	See Rate Details	\$3,795.12	\$4,807.23	\$8,602.35
HMO Plus		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum HMO Plus Q/10/Vision (Signature)	See Rate Details	\$4,065.46	\$5,149.70	\$9,215.16
<input type="checkbox"/> KP MD Gold HMO Plus Q/20/Vision (Signature)	See Rate Details	\$3,758.99	\$4,761.50	\$8,520.49

b. Example with *Composite Rates* button selected:

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote

Choose: ☐ Member Level Rates ☒ Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Composite premium rating calculation is not available with a dental plan option.

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

[View Dental Plans](#)

SEARCH

Search by plan name

PRODUCT TYPE

- ☐ HMO
- ☐ HMO Plus
- ☐ DHMO
- ☐ DHMO Plus
- ☐ HSA
- ☐ Added Choice Deductible
- ☐ Virtual Complete
- ☐ Flexible Choice
- ☐ Flexible Choice Deductible
- ☐ Flexible Choice HSA
- ☐ Virtual Forward

HMO	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of employees at the rate:</i>					
	2 employees	2 employees	1 employee	2 employees	
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Signature)	\$639.75	\$1,279.50	\$1,247.51	\$1,887.26	\$8,860.50
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Select)	\$671.72	\$1,343.44	\$1,309.85	\$1,981.57	\$9,303.27
<input type="checkbox"/> KP MD Gold Q/20/Vision (Signature)	\$591.53	\$1,183.06	\$1,153.48	\$1,745.01	\$8,192.74
<input type="checkbox"/> KP MD Gold Q/20/Vision (Select)	\$621.11	\$1,242.22	\$1,211.16	\$1,832.27	\$8,602.35
HMO Plus	Employee Tier	Employee + Spouse Tier	Employee + Children Tier	Employee + Family Tier	*Total Monthly Employer Premium
<i>Number of employees at the rate:</i>					
	2 employees	2 employees	1 employee	2 employees	

c. Example of 'On Exchange' quote (*Composite Rates* button not available)

Quote Summary

Your quick quote is now complete and ready to download.

Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2023 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.

Download All Plans Quote

Choose: ☒ Member Level Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Composite premium rating calculation requires at least 2 subscribers.

Download Select Plans Quote (.pdf)

Compare Plans

SEARCH

Search by plan name

PRODUCT TYPE

☐ HMO

☐ HMO Plus

☐ Added Choice

☐ DHMO

☐ Added Choice Deductible

☐ DHMO Plus

☐ HSA

☐ Virtual Complete

☐ Virtual Forward

METAL TIERS

HMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP DC Platinum Q/10/Vision (Signature)	See Rate Details	\$3,833.85	\$4,989.24	\$8,823.09
<input type="checkbox"/> KP DC Platinum Q/10/Vision (Select)	See Rate Details	\$4,025.61	\$5,238.81	\$9,264.42
<input type="checkbox"/> KP DC Standard Platinum Q/20/10%/Vision	See Rate Details	\$3,774.32	\$4,911.77	\$8,686.09
<input type="checkbox"/> KP DC Gold Q/20/Vision (Signature)	See Rate Details	\$3,524.98	\$4,587.29	\$8,112.27
<input type="checkbox"/> KP DC Gold Q/20/Vision (Select)	See Rate Details	\$3,701.19	\$4,816.55	\$8,517.74
HMO Plus		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium

Download the 'All Plans' Quote

The 'All Plans' Quote contains Member Level or Composite Rates based on the selections you have made in the quoting process.

- There are two buttons to **Download All Plans Quote** to your computer. Download as PDF and/or CSV.

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote

Choose: ☒ Member Level Rates ☐ Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Download Select Plans Quote (.pdf)

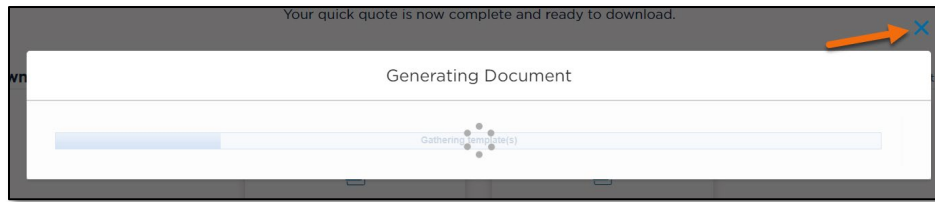
Compare Plans

[View Dental Plans](#)

SEARCH


HMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
-----	--	------------------------	-------------------------	---------------------------------

2. Once the 'All Plans' document has downloaded to your computer, click the "X" in the upper right corner of the dialogue box to close it out.



3. After the PDF or CSV document has download to your computer, open it to review.
 - a. Look for resource links located inside the documents for in-depth plan, rate and benefit comparisons, and restrictions.
 - b. When dental options are available, you can view Dental Rider Rates within the documents.

Example of Dental Plans at the end of the 'All Plans' PDF download:


KAISER PERMANENTE®

MAS Test
 Proposed Effective Date: Mar 01, 2024
 Zip Code: 21401 Rate Area: Anne Arundel

Enrollment Options

Displayed below are enrollment plan options for Adult Dental Riders that include the Total Monthly Premium if your entire census is enrolled in each plan option.

Dental Rider Rates

For more information about plan benefits and restrictions, refer to the plan highlight information at kp.org/dental.mas.

Dental Rider	Age Band	Per Member Per Month Rate	Total Premium
KP Smile SG Dental EPO	Adult Rate (19+ years old)	\$20.77	\$228.47
Total Monthly Employer Premium			\$228.47
KP Smile SG Dental EPO w/ Family Ortho	Child Rate (for first 3 children 0-18 years old)	\$3.17	\$34.87
KP Smile SG Dental EPO w/ Family Ortho	Adult Rate (19+ years old)	\$24.42	\$268.62
Total Monthly Employer Premium			\$303.49
KP Smile SG Dental EPO w/Child Ortho	Child Rate (for first 3 children 0-18 years old)	\$3.17	\$34.87
KP Smile SG Dental EPO w/Child Ortho	Adult Rate (19+ years old)	\$20.77	\$228.47
Total Monthly Employer Premium			\$263.34
KP Smile SG Dental PPO Basic	Adult Rate (19+ years old)	\$17.40	\$191.40
Total Monthly Employer Premium			\$191.40

Example of Dental Plans in the 'All Plans' Excel download:

Dental Rider	Age Band	Per Member Per Month Rate	Total Premium
KP Smile SG Dental EPO	Adult Rate (19+ years old)	\$20.77	\$228.47
			\$228.47
KP Smile SG Dental EPO w/ Family Ortho	Child Rate (for first 3 children 0-18 years old)	\$3.17	\$34.87
KP Smile SG Dental EPO w/ Family Ortho	Adult Rate (19+ years old)	\$24.42	\$268.62
			\$303.49
KP Smile SG Dental EPO w/Child Ortho	Child Rate (for first 3 children 0-18 years old)	\$3.17	\$34.87
KP Smile SG Dental EPO w/Child Ortho	Adult Rate (19+ years old)	\$20.77	\$228.47
			\$263.34
KP Smile SG Dental PPO Basic	Adult Rate (19+ years old)	\$17.40	\$191.40
			\$191.40
KP Smile SG Dental PPO Basic w/ Family Ortho	Child Rate (for first 3 children 0-18 years old)	\$3.17	\$34.87
KP Smile SG Dental PPO Basic w/ Family Ortho	Adult Rate (19+ years old)	\$21.06	\$231.66
			\$266.53

- If any issues are found in the All Plans document, scroll to the bottom of the 'Quote Summary' screen and select **Requote Quick Quote**. Refer to the [Requote](#) section later in this document.

What would you like to do next?

- Enroll Group
- Requote Quick Quote
- Requote to Detailed Quote

Cancel Save for later

Compare Select Plans and Rates

Quickly compare 2 or 3 plans, at a high level from the 'Quote Summary' screen.

- If desired, use the **Search** field, or **Filters** to locate specific plans.
- Click the checkbox for up to 3 plans you'd like to compare.
- Click **Compare Plans**.

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote Choose: ☒ Member Level Rates ☐ Composite Rates

[Download All Plans Quote \(.csv\)](#) [Download All Plans Quote \(.pdf\)](#)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

[View Dental Plans](#)

1 SEARCH

Search by plan name

PRODUCT TYPE

- ☐ HMO
- ☐ HMO Plus
- ☐ DHMO
- ☐ DHMO Plus
- ☐ HSA
- ☐ Added Choice Deductible
- ☐ Virtual Complete
- ☐ Flexible Choice
- ☐ Flexible Choice Deductible
- ☐ Flexible Choice HSA
- ☐ Virtual Forward

METAL TIERS

- ☐ Platinum
- ☐ Gold
- ☐ Silver
- ☐ Bronze

NETWORK

- ☐ Signature
- ☐ Select

[Apply Filters](#)

[Remove all filters](#)

2

		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium	
HMO					
<input type="checkbox"/>	KP MD Platinum Q/10/Vision (Signature)	See Rate Details	\$3,909.01	\$4,951.49	\$8,860.50
<input type="checkbox"/>	KP MD Platinum Q/10/Vision (Select)	See Rate Details	\$4,104.35	\$5,198.92	\$9,303.27
<input checked="" type="checkbox"/>	KP MD Gold Q/20/Vision (Signature)	See Rate Details	\$3,614.41	\$4,578.33	\$8,192.74
<input type="checkbox"/>	KP MD Gold Q/20/Vision (Select)	See Rate Details	\$3,795.12	\$4,807.23	\$8,602.35
HMO Plus					
<input type="checkbox"/>	KP MD Platinum HMO Plus Q/10/Vision (Signature)	See Rate Details	\$4,065.46	\$5,149.70	\$9,215.16
<input type="checkbox"/>	KP MD Gold HMO Plus Q/20/Vision (Signature)	See Rate Details	\$3,758.99	\$4,761.50	\$8,520.49
DHMO					
<input type="checkbox"/>	KP MD Platinum 500/20/Vision (Signature)	See Rate Details	\$3,753.78	\$4,754.84	\$8,508.62
<input type="checkbox"/>	KP MD Platinum 500/20/Vision (Select)	See Rate Details	\$3,941.35	\$4,992.47	\$8,933.82
<input checked="" type="checkbox"/>	KP MD Gold 500/20/Vision (Signature)	See Rate Details	\$3,459.36	\$4,381.95	\$7,841.31
<input type="checkbox"/>	KP MD Gold 500/20/Vision (Select)	See Rate Details	\$3,632.21	\$4,600.88	\$8,233.09
<input type="checkbox"/>	KP MD Gold 1000/20/Vision (Signature)	See Rate Details	\$3,325.11	\$4,211.88	\$7,536.99
<input type="checkbox"/>	KP MD Gold 1000/20/Vision (Select)	See Rate Details	\$3,491.28	\$4,422.35	\$7,913.63
<input type="checkbox"/>	KP MD Gold 1500/20/Vision (Signature)	See Rate Details	\$3,260.23	\$4,129.69	\$7,389.92
<input checked="" type="checkbox"/>	KP MD Gold 1500/20/Vision (Select)	See Rate Details	\$3,423.13	\$4,336.06	\$7,759.19

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

- The 'Plan Comparison' page opens. Review the details.
- Scroll to the bottom and click **Go back to Plans and Rates**.

Plan Comparison			
Plan Name *Monthly Premium	KP MD Gold 1500/20/Vision (Select) \$7,759.19/mo	KP MD Gold 500/20/Vision (Signature) \$7,841.31/mo	KP MD Gold 0/20/Vision (Signature) \$8,192.74/mo
Deductible	E = \$1,500 Ind; \$3,000 Fam	E = \$500 Ind; \$1,000 Fam	\$0
Out Of Pocket Max	E = \$8,000 Ind; \$16,000 Fam	E = \$7,750 Ind; \$15,500 Fam	E = \$7,750 Ind; \$15,500 Fam
Primary Care Visits	\$20 (Copay Waived For Children Under Age 5)	\$20 (Copay Waived For Children Under Age 5)	\$20 (Copay Waived For Children Under Age 5)
Emergency Visits	\$350 After Deductible (Waived If Admitted)	\$300 (Waived If Admitted)	\$300 (Waived If Admitted)
Inpatient Hospitalization	\$500 Per Admission After Deductible	\$500 Per Admission After Deductible	\$500 Per Admission
Prescriptions			
Generic	\$10	\$10	\$10
Brand	\$50 After \$150 Rx Deductible	\$50	\$50
Non-Preferred	\$100 After \$150 Rx Deductible	\$100	\$100
Specialty	50% Up To \$150 After \$150 Rx Deductible	50% Up To \$150	50% Up To \$150

*Total Monthly Premium assuming all employees + dependents are enrolled on the plan

[Go back to Plans and Rates](#)

- Repeat steps 1-5 as needed to identify a suitable recommendation for the group.

View and download Rate Details

When viewing the 'Quote Summary' with **Member Level Rates** selected, you can view and download rate details for any of the plans.

- Click **See Rate Details** for any plan.

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote

Choose:
☒ Member Level Rates
☐ Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

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

[View Dental Plans](#)

SEARCH

Search by plan name

PRODUCT TYPE
☐ HMO

HMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum 0/10/Vision (Signature)	See Rate Details	\$3,909.01	\$4,951.49	\$8,860.50
<input type="checkbox"/> KP MD Platinum 0/10/Vision (Select)	See Rate Details	\$4,104.35	\$5,198.92	\$9,303.27
<input type="checkbox"/> KP MD Gold 0/20/Vision (Signature)	See Rate Details	\$3,614.41	\$4,578.33	\$8,192.74

- 2. Review the 'Rate Details' screen.
- 3. Click **Download Rate Details** as PDF or Excel, if desired.

Member Rate Details

KP MD Platinum 0/10/Vision (Signature)

Rate Details

Download Rate Details (.pdf)

Download Rate Details (.xlsx)

TOTAL EMPLOYEE PREMIUM

TOTAL DEPENDENT PREMIUM

TOTAL MONTHLY EMPLOYER PREMIUM

\$3,909.01

\$4,951.49

\$8,860.50

EMPLOYEE	AGE	RELATIONSHIP	MEMBER RATE	TOTAL FAMILY PREMIUM
1. Jason Young	34	Employee	\$463.75	
				\$463.75
2. Brianne Smith	47	Employee	\$597.07	
				\$597.07
3. Gordon Ramsey	63	Employee	\$1,127.66	
Dependent 1	59	Spouse	\$994.35	
				\$2,122.01
4. David Hall	21	Employee	\$382.00	
Dependent 1	20	Spouse	\$370.54	

- 4. After reviewing Rate Details, go to the bottom of the page and click **Return to Quote Summary**.

				\$2,174.50
7. David King	24	Employee	\$485.38	
Dependent 1	19	Spouse	\$456.75	
				\$942.13

Return to Quote Summary

Cancel

- 5. Repeat steps 1-3 to view additional rate details.

View Dental Plans

Dental plans are included in the 'All Plans' download (p. 11) and 'Select Plans' download (p. 18), when available. You can also view available Dental Plans from the 'Quote Summary' screen.

1. Click **View Dental Plans**.

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

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

[View Dental Plans](#)

SEARCH

Search by plan name

PRODUCT TYPE

☐ HMO
 ☐ HMO Plus
 ☐ DHMO
 ☐ DHMO Plus
 ☐ HSA
 ☐ Added Choice Deductible
 ☐ Virtual Complete
 ☐ Flexible Choice
 ☐ Flexible Choice Deductible
 ☐ Flexible Choice HSA
 ☐ Virtual Forward

METAL TIERS

☐ Platinum
 ☐ Gold
 ☐ Silver
 ☐ Bronze

HMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum Q/1Q/Vision (Signature)	See Rate Details	\$5,909.01	\$4,951.49	\$8,860.50
<input type="checkbox"/> KP MD Platinum Q/1Q/Vision (Select)	See Rate Details	\$4,104.35	\$5,198.92	\$9,303.27
<input type="checkbox"/> KP MD Gold Q/2Q/Vision (Signature)	See Rate Details	\$3,614.41	\$4,578.33	\$8,192.74
<input type="checkbox"/> KP MD Gold Q/2Q/Vision (Select)	See Rate Details	\$3,795.12	\$4,807.23	\$8,602.35

HMO Plus		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum HMO Plus Q/1Q/Vision (Signature)	See Rate Details	\$4,065.46	\$5,149.70	\$9,215.16
<input type="checkbox"/> KP MD Gold HMO Plus Q/2Q/Vision (Signature)	See Rate Details	\$3,758.99	\$4,761.50	\$8,520.49

DHMO		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum 50Q/2Q/Vision (Signature)	See Rate Details	\$3,753.78	\$4,754.84	\$8,508.62

2. After reviewing the 'Dental Plans' screen, click **Return to Quote Summary**.

[Return to Quote Summary](#)

Dental Plans

Groups that intend to request the composite premium rating calculation may not select a dental enhancement.

Enrollment plan options for dental plans includes the Total Monthly Premium if your entire census is enrolled in each plan option they qualify for.

Child-Only Cosmetic Ortho	Per Member Per Month Rate		Total Monthly Employer Premium
	Adult rate (19+)	Child rate (0-18)	
KP OrthoPlus EPO (Child-Only)	N/A	\$3.17	\$34.87
KP OrthoPlus PPO (Child-Only)	N/A	\$3.17	\$34.87

Adult Dental and Child Cosmetic Ortho	Per Member Per Month Rate		Total Monthly Employer Premium
	Adult rate (19+)	Child rate (0-18)	
KP Smile SG Dental EPO w/Child Ortho	\$20.77	\$3.17	\$263.34
KP Smile SG Dental PPO Basic w/ Child Ortho	\$17.40	\$3.17	\$226.27
KP Smile SG Dental PPO w/Child Ortho	\$25.80	\$3.17	\$318.67
KP Smile SG Dental PPO High w/Child Ortho	\$30.03	\$3.17	\$365.20
KP Smile SG Dental POS w/ Child Ortho	\$27.12	\$3.17	\$333.19

Download Select Plans

After locating the plan options that work best for your group, create a 'Select Plans' Quote.

1. Check the box for any plans that you would like to include in the 'Select Plans' Quote.
2. Click **Download Select Plans Quote (.pdf)** to download the select plans to your computer.

Quote Summary

Your quick quote is now complete and ready to download.

Download All Plans Quote Choose: ☒ Member Level Rates ☐ Composite Rates

Download All Plans Quote (.csv)

Download All Plans Quote (.pdf)

More Options

To download a select plans quote pdf, select any number of plans and click "Download Select Plans Quote (.pdf)"

To compare plans, select 2-3 plans from the list below and click "Compare Plans"

Download Select Plans Quote (.pdf)

Compare Plans

[View Dental Plans](#)

SEARCH

Search by plan name

PRODUCT TYPE

☐ HMO

☐ HMO Plus

☐ DHMO

☐ DHMO Plus

☐ HSA

☐ Added Choice Deductible

☐ Virtual Complete

☐ Flexible Choice

☐ Flexible Choice Deductible

☐ Flexible Choice HSA

☐ Virtual Forward

METAL TIERS

☐ Platinum

☐ Gold

☐ Silver

☐ Bronze

NETWORK

☐ Signature

☐ Select

Apply Filters

Remove all filters

		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
HMO				
<input type="checkbox"/>	KP MD Platinum Q/10/Vision (Signature)	See Rate Details	\$3,909.01	\$4,951.49
<input type="checkbox"/>	KP MD Platinum Q/10/Vision (Select)	See Rate Details	\$4,104.35	\$5,198.92
<input checked="" type="checkbox"/>	KP MD Gold Q/20/Vision (Signature)	See Rate Details	\$3,614.41	\$4,578.53
<input type="checkbox"/>	KP MD Gold Q/20/Vision (Select)	See Rate Details	\$3,795.12	\$4,807.23
HMO Plus				
<input type="checkbox"/>	KP MD Platinum HMO Plus Q/10/Vision (Signature)	See Rate Details	\$4,065.46	\$5,149.70
<input type="checkbox"/>	KP MD Gold HMO Plus Q/20/Vision (Signature)	See Rate Details	\$3,758.99	\$4,761.50
DHMO				
<input type="checkbox"/>	KP MD Platinum 500/20/Vision (Signature)	See Rate Details	\$3,753.78	\$4,754.84
<input type="checkbox"/>	KP MD Platinum 500/20/Vision (Select)	See Rate Details	\$3,941.35	\$4,992.47
<input checked="" type="checkbox"/>	KP MD Gold 500/20/Vision (Signature)	See Rate Details	\$3,459.36	\$4,381.95
<input type="checkbox"/>	KP MD Gold 500/20/Vision (Select)	See Rate Details	\$3,632.21	\$4,600.88
<input type="checkbox"/>	KP MD Gold 1000/20/Vision (Signature)	See Rate Details	\$3,325.11	\$4,211.88
<input type="checkbox"/>	KP MD Gold 1000/20/Vision (Select)	See Rate Details	\$3,491.28	\$4,422.35
<input type="checkbox"/>	KP MD Gold 1500/20/Vision (Signature)	See Rate Details	\$3,260.23	\$4,129.69
<input checked="" type="checkbox"/>	KP MD Gold 1500/20/Vision (Select)	See Rate Details	\$3,423.13	\$4,336.06
<input type="checkbox"/>	KP MD Silver DHMO 1800/40/Vision (Signature)	See Rate Details	\$2,973.80	\$3,766.90

3. Open the 'Select Plans' PDF from your computer to review. Scroll through the document to locate the following resources/links: **Member Level Age-Band Rate**; **Plan Guide Brochure**; **Summary of Benefits (SBC)**.

Requote or Enroll the Group

At the bottom of the 'Quote Summary' page, you will notice a section called 'What would you like to do next?'. In this section, you can:

1. **Enroll Group**- Click here to convert the quote to an enrollment. Refer to the job aid 02: Generate New Self Service Group Enrollment.
2. **Requote Quick Quote**- Refer to [Requote](#) section later in this document.
3. **Requote to Detailed Quote**- Refer to [Convert a Quick Quote to a Detailed Quote](#) section below.

Virtual Forward		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Silver Virtual Forward 3000 (Signature)	See Rate Details	\$340.72	\$0.00	\$340.72

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

What would you like to do next?

- Enroll Group
- Requote Quick Quote
- Requote to Detailed Quote

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

Note: Groups that have selected "On Exchange" will need to contact KP for help with New Group Enrollment. Please email mas-small-group-new-business@kp.org.

Virtual Forward		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Silver Virtual Forward 3000	See Rate Details	\$3,784.41	\$4,057.41	\$7,841.82

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

What would you like to do next?

- Requote Quick Quote
- Requote to Detailed Quote
- For assistance with New Group Enrollment, please contact: mas-small-group-new-business@kp.org

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

Generate a Detailed Quote

Detailed Quote offers a high level of accuracy by tailoring medical plans to individual members. If you're looking for a fast and simple quoting option, please see [Generate a Quick Quote](#).

Begin a Detailed Quote

There are two ways to begin a Detailed Quote.

1. If you have already completed a Quick Quote for the group, save time by reusing some of the group information you already entered. Follow the steps in the section titled [Convert a Quick Quote to a Detailed Quote](#).
2. Or, if you have not completed a Quick Quote for the group, click **Get a Detailed Quote** on the 'Prospect Quote to Enroll' page (refer to [Where to Locate the Broker Self-Service Tools](#) for help).

KAISER PERMANENTE | Broker

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.

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
CPQ-STG-23864 Testing Bug	Enrollment	Received - In Review	00029619	10/17/2023	02/01/2024	Select Action <input type="button" value="Enter"/>
CPQ-23807-STG Test	Enrollment	Received - In Review	00029618	10/17/2023	02/01/2024	Select Action <input type="button" value="Enter"/>

Group Details

Use the 'Group Details' screen to enter basic information about the group you are preparing the quote for.

1. Complete all required fields(*). Note the following:
 2. On Exchange (SHOP) or Off Exchange:
 - i. To quote for SHOP plans and rates, select 'On Exchange'. The workflow is the same as 'Off Exchange' with the following exceptions:
 - Composite Rates are not available.
 - Dental rates are not available.
 - "Click to buy" for New Group Enrollment is not available. For assistance with New Group Enrollment, contact mas-small-group-new-business@kp.org
 - ii. Off Exchange is not available in DC.
 - c. **Physical Address Zip:** Rates are based on the group's zip code and county. Be sure to enter a zip code for the service area that matches your log in.
3. Click **Next** to continue to the 'Add Employees' screen.

Group Details

Company Information

* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING
Mid-Atlantic States

*THIS GROUP IS QUOTING
☒ Off Exchange ☐ On Exchange

*LEGAL BUSINESS NAME

The legal company name is the name as stated on your local business license, quarterly wage and tax report, corporate or partnership documents.

*QUOTE EFFECTIVE DATE

Plans and rates are based on the proposed effective date.

TOTAL NUMBER OF EMPLOYEES (FULL-TIME AND PART-TIME)

*HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

*PHYSICAL ADDRESS ZIP

*COUNTY

Rates are based on the group's ZIP Code and county.

*Are any employees eligible for Medicare or on Medicare, either through age or disability?
☐ Yes ☒ No

Employer Company Contact

FIRST NAME	MIDDLE INITIAL	LAST NAME
<input type="text"/>	<input type="text"/>	<input type="text"/>

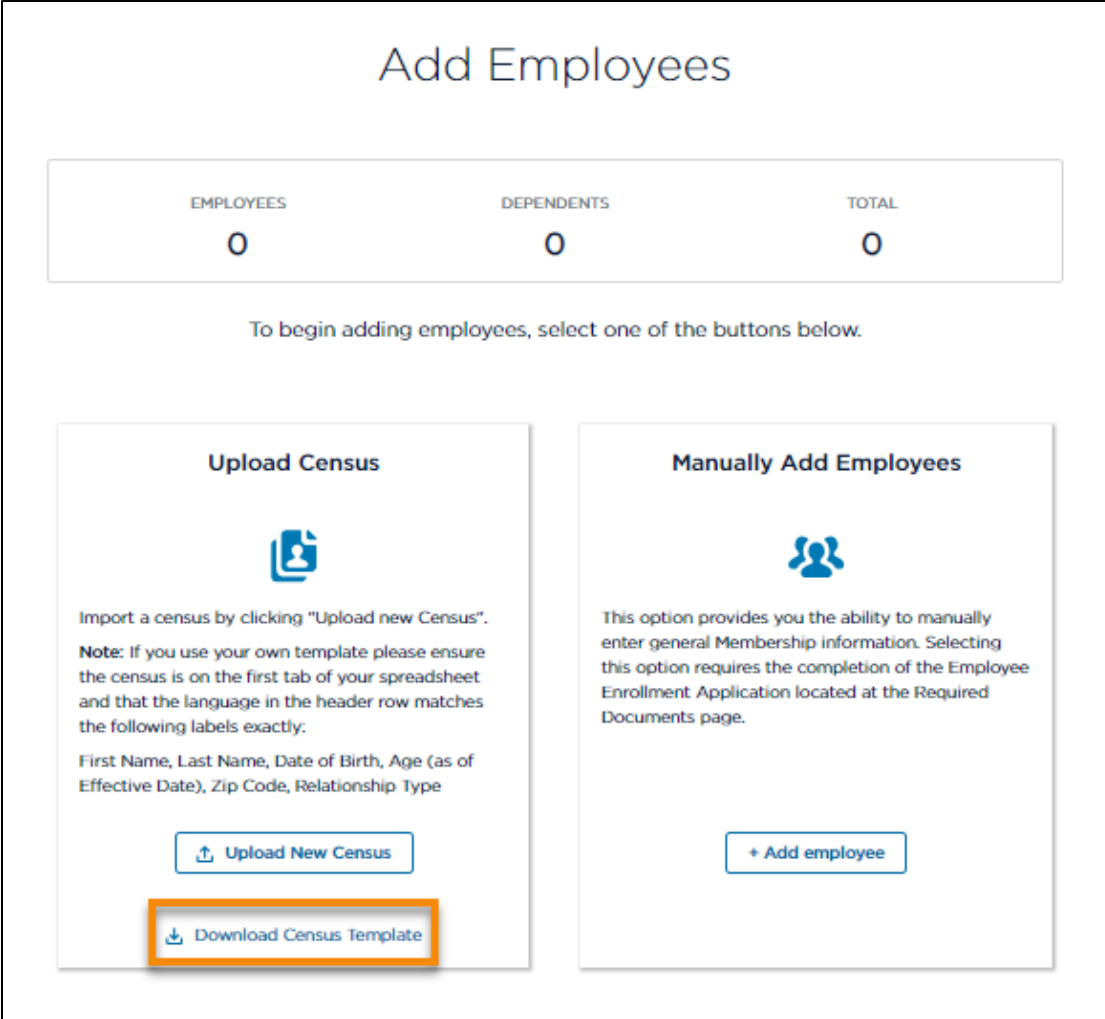
Add Employees

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

Note: If you use your own template, ensure that the census is on the first tab of your spreadsheet and the headers match what is in the census template (see below).

To upload employees/dependents using the Census Template

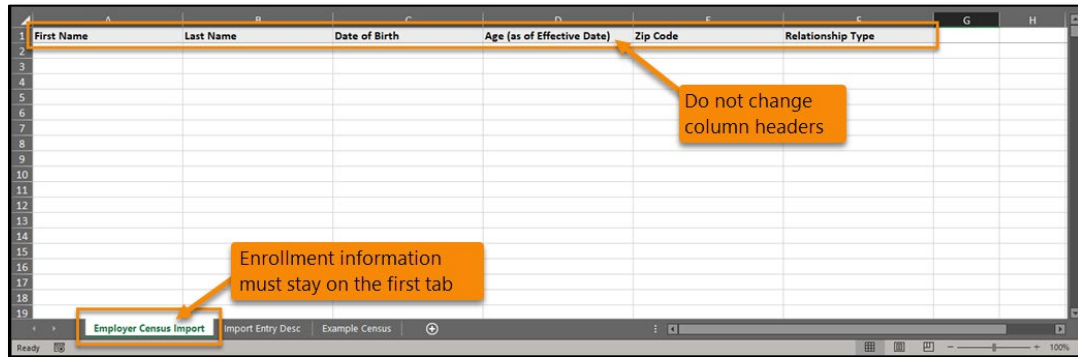
1. Click **Download census template**.



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

- Open the template in Excel and review the column headers.

Note: Do not change the column headers or tabs in the census template, these map directly to the required fields in the quoting tool.

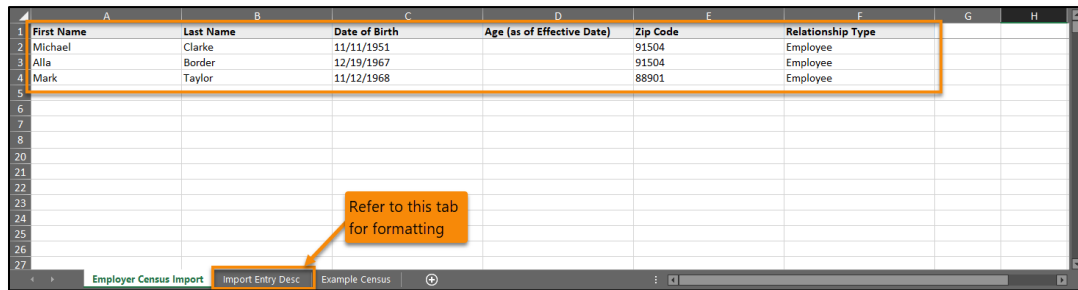


Do not change the column headers or tabs in the census template, as they will map directly to the required fields in the quoting tool when the completed spreadsheet is uploaded.

- Enter employee and dependent information in the template. 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 for a Detailed Quote.

Note: For a more precise Detailed Quote, enter accurate zip codes for individual employees instead of using a collective group zip code.



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


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

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

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


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. Selecting this option requires the completion of the Employee Enrollment Application located at the Required Documents page.

+ Add employee




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

7. Verify that the totals for Employees, Dependents and Total, match your spreadsheet.

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
7	15	22

[Download census template](#)

 Upload New Census

+ Add employee

8. Scroll down the page to verify the employee data. Edit employee information by typing into the fields, or use the **Delete Employee** and **Add Dependent** buttons, as needed.

Expand All | Collapse All Download census details | Delete all employees

EMPLOYEE 1
Jason Young 0 Dependents Delete Employee 1

Details

* FIRST NAME MIDDLE INITIAL * LAST NAME RELATIONSHIP TYPE
Jason Employee

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * ZIP CODE
11/11/1990 34 21404
mm/dd/yyyy Enter 5-digit zip code

+ Add dependent

EMPLOYEE 2
Brienne Smith 0 Dependents Delete Employee 2

Details

* FIRST NAME MIDDLE INITIAL * LAST NAME RELATIONSHIP TYPE
Brienne Employee

Out of Service Area: When an employee lives outside the service area zip code, a checkbox appears to confirm if the employee works within the service area. When more than 49% of the subscribers live outside of the service area, you cannot proceed with the Detailed Quote. Contact Kaiser Permanente for assistance.

FIRST NAME MIDDLE INITIAL LAST NAME RELATIONSHIP TYPE
David King Employee

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * ZIP CODE
12/20/1998 24 80014
mm/dd/yyyy Enter 5-digit zip code

DOES THE EMPLOYEE WORK IN THE SERVICE AREA?
☐ Yes

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

Dependent 1

* DATE OF BIRTH mm/dd/yyyy AGE (AS OF EFFECTIVE DATE) * RELATIONSHIP TYPE
07/01/2004 19 Spouse
mm/dd/yyyy

+ Add dependent Delete dependent 1

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

9. Once you have verified the employee and dependent information, scroll to the bottom of the page and click **Next** to select the medical plans.

To manually enter employees

1. From the 'Add Employees' screen, click **Add Employee**.
2. Type employee information into the fields.
3. Click **Add Dependent** to add a dependent under the Employee.
4. Click **Add Employee** for each additional employee.
5. When you have completed manually adding employees, click **Next** to select medical plans.

Add Employees

There are two ways to add Employees. You can add them manually by clicking "Manually Add Employees", or import a census by clicking "Upload Census". If you need a census template, download one from this page.

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

EMPLOYEES	DEPENDENTS	TOTAL
1	0	1

[Download census template](#) [Upload new census](#) [+ Add employee](#)

Expand All | Collapse All

Download census details | Delete all employees

EMPLOYEE 1
Jane Doe
0 Dependents
Delete Employee 1

Details

*FIRST NAME
Jane

MIDDLE INITIAL

*LAST NAME
Doe

RELATIONSHIP TYPE
Employee

*DATE OF BIRTH mm/dd/yyyy
08/09/1965
mm/dd/yyyy

AGE (AS OF EFFECTIVE DATE)

*ZIP CODE
21401
Enter 5-digit zip code

[+ Add dependent](#)

Save Subscribers

[+ Add employee](#)

Previous

Next

Medical Plan Selection

Use the 'Medical Plan Selection' screen to select the specific plans you will include in the quote.

Note: 'On Exchange' plan offering does not fully align with 'Off Exchange' plan offering. Keep in mind that the rates on your screen may vary based on the information you've provided and the choices you've made while quoting.

1. Use the **Search** and **Filters** to locate specific plans.
2. Select all the plans that you would like to include in the quote.
 - **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.

Medical Plan Selection

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.

SEARCH

Search by plan name

PRODUCT TYPE

- ☐ HMO
- ☐ HMO Plus
- ☐ DHMO
- ☐ DHMO Plus
- ☐ HSA
- ☐ Added Choice Deductible
- ☐ Virtual Complete
- ☐ Flexible Choice
- ☐ Flexible Choice Deductible
- ☐ Flexible Choice HSA
- ☐ Virtual Forward

METAL TIERS

- ☐ Platinum
- ☐ Gold
- ☐ Silver
- ☐ Bronze

NETWORK

- ☐ Signature
- ☐ Select

Apply Filters

Remove all filters

HMO

- ☒ KP MD Platinum 0/10/Vision (Signature)
- ☐ KP MD Platinum 0/10/Vision (Select)
- ☐ KP MD Gold 0/20/Vision (Signature)
- ☐ KP MD Gold 0/20/Vision (Select)

HMO Plus

- ☒ KP MD Platinum HMO Plus 0/10/Vision (Signature)
- ☐ KP MD Gold HMO Plus 0/20/Vision (Signature)

DHMO

- ☐ KP MD Platinum 500/20/Vision (Signature)
- ☐ KP MD Platinum 500/20/Vision (Select)
- ☐ KP MD Gold 500/20/Vision (Signature)
- ☐ KP MD Gold 500/20/Vision (Select)
- ☐ KP MD Gold 1000/20/Vision (Signature)
- ☐ KP MD Gold 1000/20/Vision (Select)
- ☐ KP MD Gold 1500/20/Vision (Signature)

3. Click **Next**.

Dental Plan Selection

1. Select a Dental Plan option, or click Next to opt out of dental coverage.

Notes:

- 'Dental Plan Selection' is not available for 'On Exchange'.
 - Groups that intend to request the composite premium rating calculation may not select a dental enhancement.
2. Click **Next** to continue.

The screenshot shows the 'Dental Plan Selection' interface. At the top, it states: 'Groups may select 1 family cosmetic orthodontic and 1 child cosmetic orthodontic plan.' Below this is a search bar labeled 'SEARCH' with a magnifying glass icon and the text 'Search by plan name'. To the right, under the heading 'Adult Traditional Dental', there is a list of options with checkboxes: 'HMO Adult Dental Rider - Age 19 or Older', 'POS 2nd Level Adult Dental Rider - Age 19 or Older', 'PPO 1 Adult Dental Rider - Age 19 or Older' (which is selected with a blue checkmark), and 'PPO 3 Adult Dental Rider - Age 19 or Older'. Below the list, it says 'Click next to opt out of dental coverage'. At the bottom, it states 'Dental benefits are underwritten by KFHP-MAS and administered by Liberty Dental Plan.' and 'Groups that intend to request the composite premium rating calculation may not select a dental enhancement.'

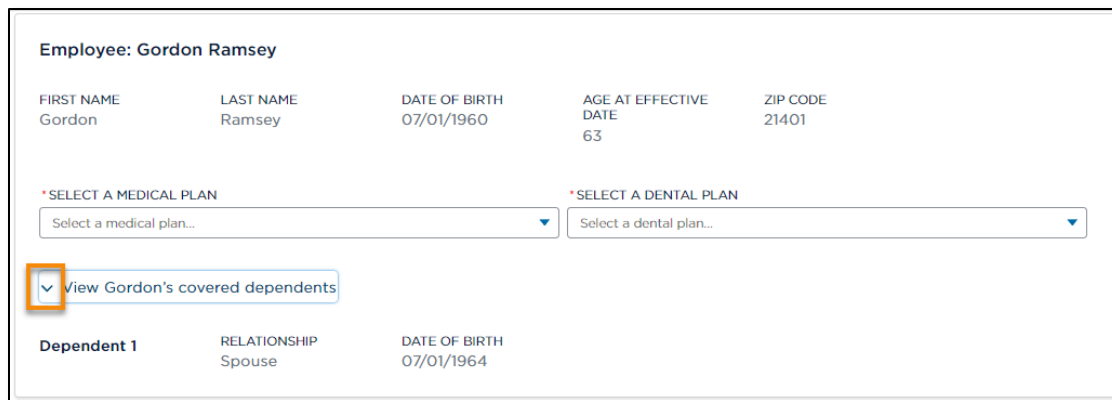
Plan Assignments

1. Assign medical and dental plans to each employee using the drop down menus.

Note: You can *waive* dental plans for individual employees using the drop down menu.

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 instructions: 'To offer a dental plan option, at least 50% of the medical plan participants must enroll in dental.', 'To offer a dental plan option with ortho, at least 5 members must enroll in dental.', and 'EPO dental plans are not available to employees enrolling in a POS medical plan.' There is a search bar labeled 'SEARCH EMPLOYEES' with a magnifying glass icon and the text 'Search by employee's first or last name'. To the right, there is a 'SORT EMPLOYEES' dropdown menu with the text 'Select a sort option...'. Below this, it says '7 of 7 employees'. The main section is titled 'Employee: Jason Young' and contains a table with the following information: FIRST NAME (Jason), LAST NAME (Young), DATE OF BIRTH (11/11/1988), AGE AT EFFECTIVE DATE (34), and ZIP CODE (21401). Below the table, there are two dropdown menus. The first is labeled '* SELECT A MEDICAL PLAN' and has 'KP MD Platinum HMO Plus 0/10/Vision (Signature)' selected. The second is labeled '* SELECT A DENTAL PLAN' and has 'PPO 1 Adult Dental Rider - Age 19 or Older' selected. Below the second dropdown menu, there is a 'Waive Dental Plan' option.

2. Click the caret to view any dependents covered under the employee.



Employee: Gordon Ramsey

FIRST NAME	LAST NAME	DATE OF BIRTH	AGE AT EFFECTIVE DATE	ZIP CODE
Gordon	Ramsey	07/01/1960	63	21401

*SELECT A MEDICAL PLAN
Select a medical plan...

*SELECT A DENTAL PLAN
Select a dental plan...

☒ View Gordon's covered dependents

Dependent 1	RELATIONSHIP	DATE OF BIRTH
	Spouse	07/01/1964

3. Click **Next** to continue.

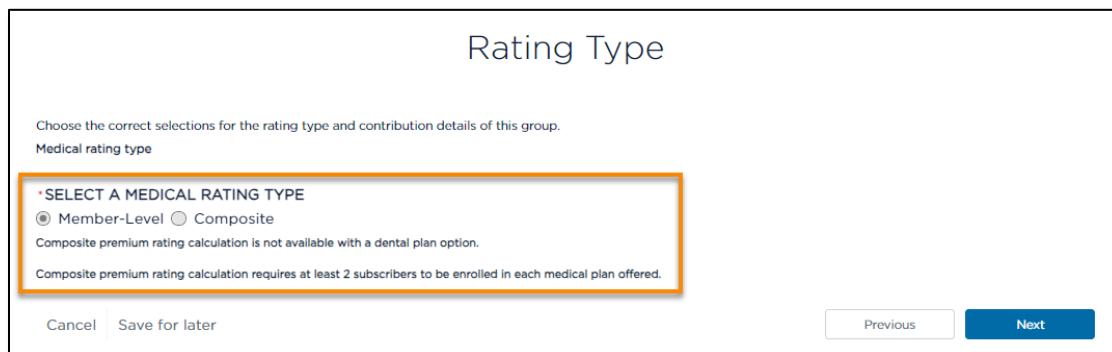
Rating Type

Select the rating type for the Detailed Quote.

1. Click Member Level or Composite*.

* Composite rating is not available in the following circumstances:

- When quoting 'On Exchange'.
- When a dental option is offered.
- There are not at least 2 subscribers for each medical plan offered.



Rating Type

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

Composite premium rating calculation is not available with a dental plan option.

Composite premium rating calculation requires at least 2 subscribers to be enrolled in each medical plan offered.

Cancel Save for later

Previous Next

2. Click **Next** to generate the Detailed Quote.

Detailed Quote Summary

1. Scroll down the page to review the medical and dental rate summary.

Note: Dental rates are not available when quoting 'On Exchange'.

2. Click **Download Detailed Quote** as PDF or Excel.

Detailed Quote Summary


Your detailed quote is now complete and ready to download.
Rates are based on the information entered in the quoting process.

Medical rates shown are those that have been filed and are under review. Rates are subject to change. New KP Plus plans for 2023 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.

[Download Detailed Quote \(.xlsx\)](#) [Download Detailed Quote \(.pdf\)](#)


Company Name: **MAS DQ -On Exchange**
Effective Date: **11/01/2023**
Zip Code: **20001**
County: **District Of Columbia**
Employee Count: **7**
Member Count: **22**
Rating Type: **Member Level**

TOTAL EMPLOYEE
MEDICAL PREMIUM




\$2,982.01

TOTAL DEPENDENT
MEDICAL PREMIUM



\$3,880.66

TOTAL MONTHLY
MEDICAL PREMIUM





\$6,862.67

TOTAL MONTHLY PREMIUM : \$6,862.67

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	63	KP DC Gold Virtual Complete 2000 (Signature)	\$845.19	
	Spouse	59		\$782.80	
					\$1,627.99
2. Brianne Smith	Employee	47	KP DC Gold Virtual Complete 2000 (Signature)	\$494.10	
					\$494.10
3. Mike Hill	Employee	47	KP DC Gold Virtual Complete 2000 (Signature)	\$494.10	
	Child	25		\$281.73	
	Child	23		\$281.73	
	Child	18		\$253.44	
					\$1,311.00
4. Jason Young	Employee	34	KP DC Gold Virtual Complete 2000 (Signature)	\$331.72	
					\$331.72
5. David King	Employee	24	KP DC Gold Virtual Complete 2000 (Signature)	\$281.73	
	Spouse	19		\$253.44	
					\$535.17
			KP DC Gold Virtual Complete 2000		

 KAISER PERMANENTE® 

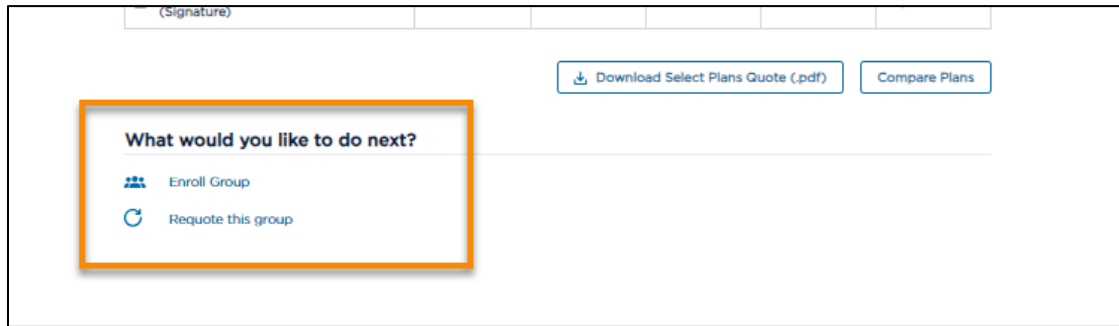
Author: SK

V3

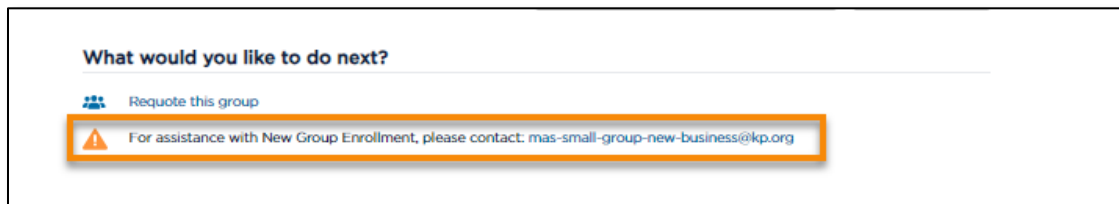
Publish Date: 2/15/2024

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3. At the bottom of the screen, there is a section called **What would you like to do next?** In this section, you can:
- **Enroll Group***: This “click to buy” option begins a new group application using the data you already entered for the quote. For complete steps, refer to job aid 02: Generate Self-Service New Group Enrollment.
 - **Requote this Group**: If you need to makes changes to the quote, you can requote using the data you already entered. Refer to the [Requote](#) section of this document.



***Note:** ‘Click to buy’ is not available for ‘On Exchange’ quotes. For these groups, please email mas-small-group-new-business@kp.org for help with New Group Enrollment.



Cancel, Save or Edit a Quote

Cancel a Quote

You can abandon a quote you've started.

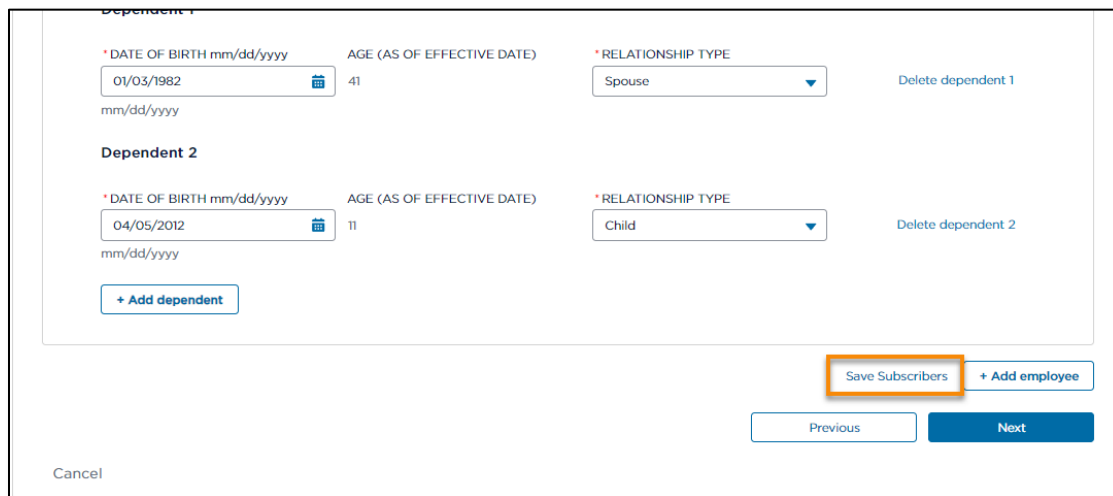
1. From any of the screens in the quote, click **Cancel** in the lower left corner of the screen.
2. Any data you've entered will not be saved.

A screenshot of a web form. At the top, there are two empty input fields. Below them are two more input fields labeled 'PHONE' and 'FAX'. In the bottom left corner, there is a button labeled 'Cancel' which is highlighted with an orange border. In the bottom right corner, there is a blue button labeled 'Next'.

Save Quick Quote Subscribers for Later

Quick Quoting consists of three screens and each time you click 'Next' the system saves your work. But what if you are mid-way through adding subscribers in the 'Add Employees' screen and need to step away? Follow these steps to save your data and then you can return to where you left off later.

1. From the 'Add Employees' screen, click **Save Subscribers**.

A screenshot of the 'Add Employees' screen. It shows two dependent sections. 'Dependent 1' has a date of birth of 01/03/1982, age 41, and relationship 'Spouse'. 'Dependent 2' has a date of birth of 04/05/2012, age 11, and relationship 'Child'. At the bottom, there is a button labeled 'Save Subscribers' which is highlighted with an orange border. Other buttons include '+ Add dependent', '+ Add employee', 'Previous', 'Next', and 'Cancel'.

2. To return to where you left off, go to the 'Prospect Quote to Enroll' page.
3. Scroll down to **Your Recent Activity**.
4. Look for the quote you wish to resume. In the Status column, it appears as a 'Draft'.
5. Click the **Actions** drop down menu for the quote you wish to resume.
6. Select **Resume Quote**.

- Click the **Enter** button to return to where you left off.

Get a Quick Quote

Get a Detailed Quote

Enroll a New Group

Your Recent Activity

mas

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
21928 MAS Broker	Quick Quote	Draft	00025743	08/23/2023	09/01/2023	<div> <div>Select Action</div> <div>Resume Quote</div> </div> <div>Enter</div>

Save a Detailed Quote for Later

Each time you click 'Next' during a Detailed Quote the system saves your work. But what if you are mid-way through a screen and need to step away? Follow these steps to save your incomplete screen and then pick up where you left off later.

- If you are halfway through a screen and need to step away, click **Save for Later** on the bottom left side of the screen.

The employer retains sole discretion whether to open and contribute, and how much to contribute, to a Health Savings Account (HSA) account for employees who enroll in certain plans.

Cancel Save for later

Previous Next

Note: 'Save for Later' is not available on the 'Group Details' and 'Add Employees' screens.

- On the 'Add Employee' screen click **Save Subscribers** if you need to step away while entering subscribers.

Dependent 1

* DATE OF BIRTH mm/dd/yyyy 01/03/1982

AGE (AS OF EFFECTIVE DATE) 41

* RELATIONSHIP TYPE Spouse

Delete dependent 1

Dependent 2

* DATE OF BIRTH mm/dd/yyyy 04/05/2012

AGE (AS OF EFFECTIVE DATE) 11

* RELATIONSHIP TYPE Child

Delete dependent 2

+ Add dependent

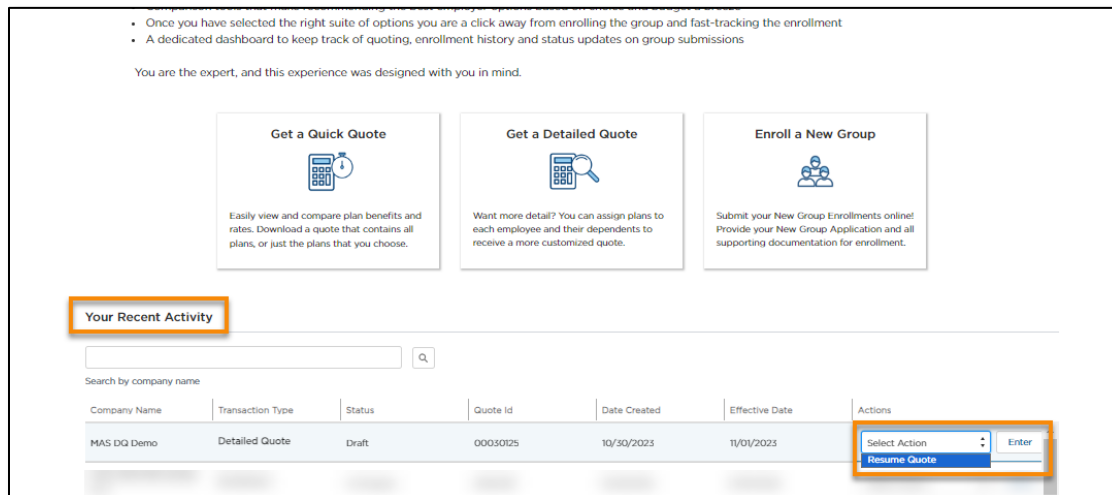
Save Subscribers + Add employee

Previous Next

Cancel

To return to where you left off, go to the 'Prospect Quote to Enroll' page.

1. Scroll down to **Your Recent Activity**.
2. Click the **Actions** drop down menu for the quote you wish to resume.
3. Select **Resume Quote**.
4. Click the **Enter** button to return to where you left off.



Edit a Quote

You cannot modify a Quick Quote or Detailed Quote after it has been generated. To change an existing quote, you will need to complete a Requote. Refer to the [Requote](#) section of this document.

Convert a Quick Quote to a Detailed Quote

If you completed a Quick Quote but need a more detailed quote with employee plan assignments, you can convert the Quick Quote into a Detailed Quote.

Convert beginning from the Prospect Quote to Enroll page

1. Go to the 'Prospect Quote to Enroll' page.
2. Search for the Group Name/Quick Quote under 'Your Recent Activity'.
3. Click the Actions menu and select **Resume Quote**.
4. Click **Enter**.

The screenshot shows the 'Your Recent Activity' section of a web application. At the top, there are three cards: 'Get a Quick Quote', 'Get a Detailed Quote', and 'Enroll a New Group'. Below these is a search bar labeled 'Search by company name'. Underneath the search bar is a table with the following columns: Company Name, Transaction Type, Status, Quote Id, Date Created, and Effective Date. The table contains one row with the following data: Company Name: CO test, Transaction Type: Quick Quote, Status: Completed, Quote Id: 00031565, Date Created: 11/20/2023, Effective Date: 12/01/2023. To the right of the table is an 'Actions' dropdown menu. The dropdown is open, showing the following options: Select Action, Resume Quote (highlighted), Convert to Buy, and Requote. An 'Enter' button is visible next to the dropdown.

5. Go to the final screen of the Quick Quote (the 'Quote Summary' screen) and continue with the steps below.

Convert beginning from the Quote Summary screen:

1. The last screen of the Quick Quote is the 'Quote Summary' screen. Scroll to the bottom of the 'Quote Summary' screen.
2. Select **Requote to Detailed Quote**.

The screenshot shows a dialog box titled 'What would you like to do next?'. The dialog box has three options: 'Enroll Group', 'Requote this group', and 'Requote to Detailed Quote' (highlighted). At the bottom of the dialog box are two buttons: 'Cancel' and 'Save for later'. In the background, there are two buttons: 'Download Select Plans Quote (.pdf)' and 'Compare Plans'.

3. Some of the group details and employee data that you entered in the Quick Quote will pre-populate in the Detailed Quote. Validate all pre-populated data and follow the steps for [Generate a Detailed Quote](#).

Requote

Requote the Group

When a Quick Quote or Detailed Quote requires changes in rating factors (group zip code, census and effective date), you will need to requote. Requoting creates a separate Quote ID, but carries over the group information from the previous quote. Adjust group information, rating criteria and census data as needed.

If you completed a Quick Quote but need a more detailed quote with employee plan assignments, see the section [Convert a Quick Quote to a Detailed Quote](#).

Requote a Quick Quote

1. There are two ways to begin a requote for a Quick Quote. Select one of the following:
 - a. From the last screen of the Quick Quote (the 'Quote Summary' screen), scroll down the page and select **Requote Quick Quote**.

Dual Choice PPO OOA		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> PPO/0/0/20/5/11 - OOA Platinum	See Rate Details	\$777.90	\$0.00	\$777.90
<input type="checkbox"/> PPO/1000/20/30/5/11 - OOA Gold	See Rate Details	\$700.62	\$0.00	\$700.62
<input type="checkbox"/> PPO/2500/10/30/5/11 - OOA Gold	See Rate Details	\$652.57	\$0.00	\$652.57
<input type="checkbox"/> PPO/3850/30/50/5/11 - OOA Silver	See Rate Details	\$582.79	\$0.00	\$582.79
<input type="checkbox"/> PPO/4850/30/50/5/11 - OOA Silver	See Rate Details	\$565.24	\$0.00	\$565.24
<input type="checkbox"/> PPO HDHP/3800/20/5/11 - OOA Silver	See Rate Details	\$580.69	\$0.00	\$580.69
<input type="checkbox"/> PPO HDHP/5000/20/5/11 - OOA Silver	See Rate Details	\$550.47	\$0.00	\$550.47
<input type="checkbox"/> PPO 6500/20/60/5/11 - OOA Bronze	See Rate Details	\$500.42	\$0.00	\$500.42
<input type="checkbox"/> PPO HDHP/7250/10/5/11 - OOA Bronze	See Rate Details	\$519.60	\$0.00	\$519.60

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

What would you like to do next?

- Enroll Group
- Requote Quick Quote**
- Requote to Detailed Quote

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

- b. Or, from the 'Prospect Quote to Enroll' page, look for the Quick Quote you'd like to requote. Select **Requote** from the **Actions** drop down menu. Click **Enter**.

KAISER PERMANENTE | Broker

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.

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
CO QQ	Quick Quote	Completed	00035388	01/29/2024	02/01/2024	<div><div>Select Action</div><div><div>Resume Quote</div><div>Convert to Buy</div><div>Requote</div></div><div>Enter</div></div>

2. After Requote is selected, the system will begin a new Quick Quote with the group information you previously entered.
3. Follow the steps for [Generate a Quick Quote](#), making adjustments, as needed.



In some cases, not all previously entered data is carried over into the new quote. Validate that all data that has copied over into the new quote.

Requote a Detailed Quote

1. There are two ways to begin a requote for a Detailed Quote. Select one of the following:
 - a. From the last screen of the Detailed Quote (the 'Detailed Quote Summary' screen), scroll down and select **Requote this group**.

The screenshot shows the 'Detailed Quote Summary' screen. At the top, there is a table with columns for employee information and rates. The total monthly premium is \$12,957.32. Below this is the 'Your Kaiser Permanente Portfolio' section, which contains a table of medical plans with their respective rates for different employee categories.

MEDICAL PLANS	EMPLOYEE RATE	EMPLOYEE + SPOUSE RATE	EMPLOYEE + CHILDREN RATE	EMPLOYEE + FAMILY RATE
KP CO Platinum 0/10 RX Copay	\$1,014.57	\$2,029.14	\$1,876.95	\$2,891.52
KP CO Platinum 400/10	\$956.26	\$1,912.52	\$1,769.08	\$2,725.34
KP CO Gold 3T POS 1500/30	\$1,034.97	\$2,069.94	\$1,914.69	\$2,949.66
KP CO Silver 2800/45	\$722.72	\$1,445.44	\$1,337.03	\$2,059.75

Below the table is a section titled 'What would you like to do next?' with two options: 'Enroll Group' and 'Requote this group'. The 'Requote this group' option is highlighted with an orange box. At the bottom, there are 'Cancel' and 'Save for later' buttons.

- b. Or, from the 'Prospect Quote to Enroll' page, look for the Detailed Quote you'd like to requote. Select **Requote** from the **Actions** drop down menu. Click **Enter**.

The screenshot shows the 'Prospect Quote to Enroll' page. It includes a welcome message and highlights of tools and features to support the business. Below this is a section titled 'Your Recent Activity' with a search bar and a table of recent activity. The table has columns for Company Name, Transaction Type, Status, Quote Id, Date Created, and Effective Date. The 'Actions' column contains a dropdown menu with options: 'Select Action', 'Resume Quote', 'Convert to Buy', and 'Requote'. The 'Requote' option is highlighted with an orange box.

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
CO Demo	Detailed Quote	Completed	00035532	01/29/2024	02/01/2024	Select Action Resume Quote Convert to Buy Requote

2. After Requote is selected, the system will begin a new Detailed Quote with the group information you previously entered.
3. Follow the steps for [Generate a Detailed Quote](#), making adjustments, as needed.



In some cases, not all previously entered data is carried over into the new quote. Validate that all data that has copied over into the new quote.