



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

## Table of Contents

Where to Locate the Broker Self-Service Tools .....	2
Generate a Quick Quote .....	3
Begin a New Quote .....	3
Group Details .....	4
Add Employees .....	5
Quote Summary .....	10
Requote or Enroll the Group .....	17
Generate a Detailed Quote .....	18
Begin a Detailed Quote .....	18
Group Details .....	19
Add Employees .....	20
Plan Selection .....	26
Plan Assignments .....	27
Rating Type .....	28
Detailed Quote Summary .....	28
Cancel, Save or Edit a Quote .....	30
Cancel a Quote .....	30
Save Quick Quote Subscribers for Later .....	30
Save a Detailed Quote for Later .....	31
Edit a Quote .....	32
Convert a Quick Quote to a Detailed Quote .....	33
Convert a Quick Quote beginning from the 'Prospect Quote to Enroll' page .....	33
Convert a Quick Quote beginning from the 'Quote Summary' screen .....	33
Requote .....	34
Requote the Group .....	34

## Overview

This document describes the steps for generating a 'Quick Quote' and a 'Detailed Quote'. These self-service tools are available to KP Brokers through the broker portal, [account.kp.org](https://account.kp.org).

**Audience:** Brokers

**Time to Complete:** 20 Min

**Line of Business:** Small Group

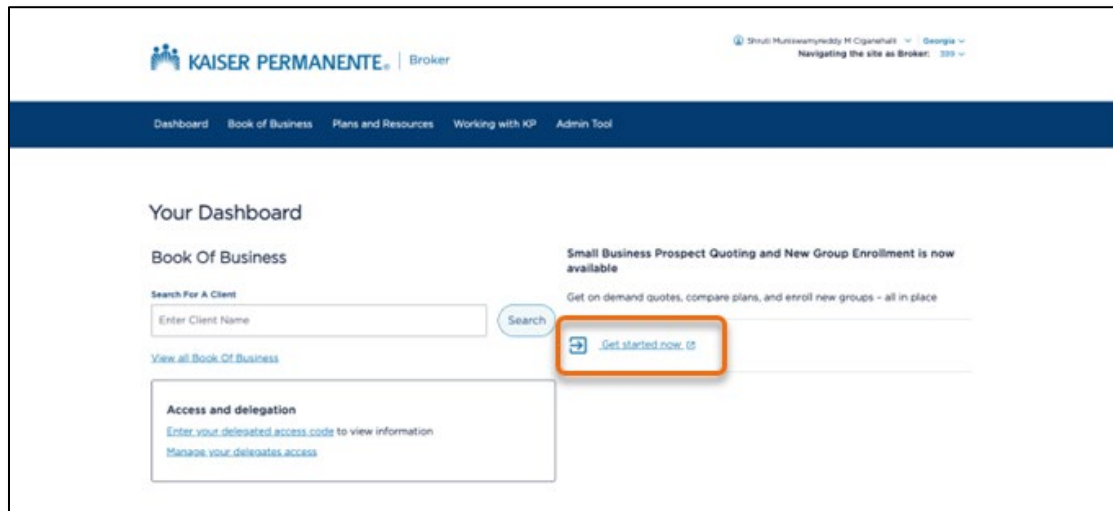
**Region:** GA/CO/HI

**Sales Connect Version:** Release 17.1

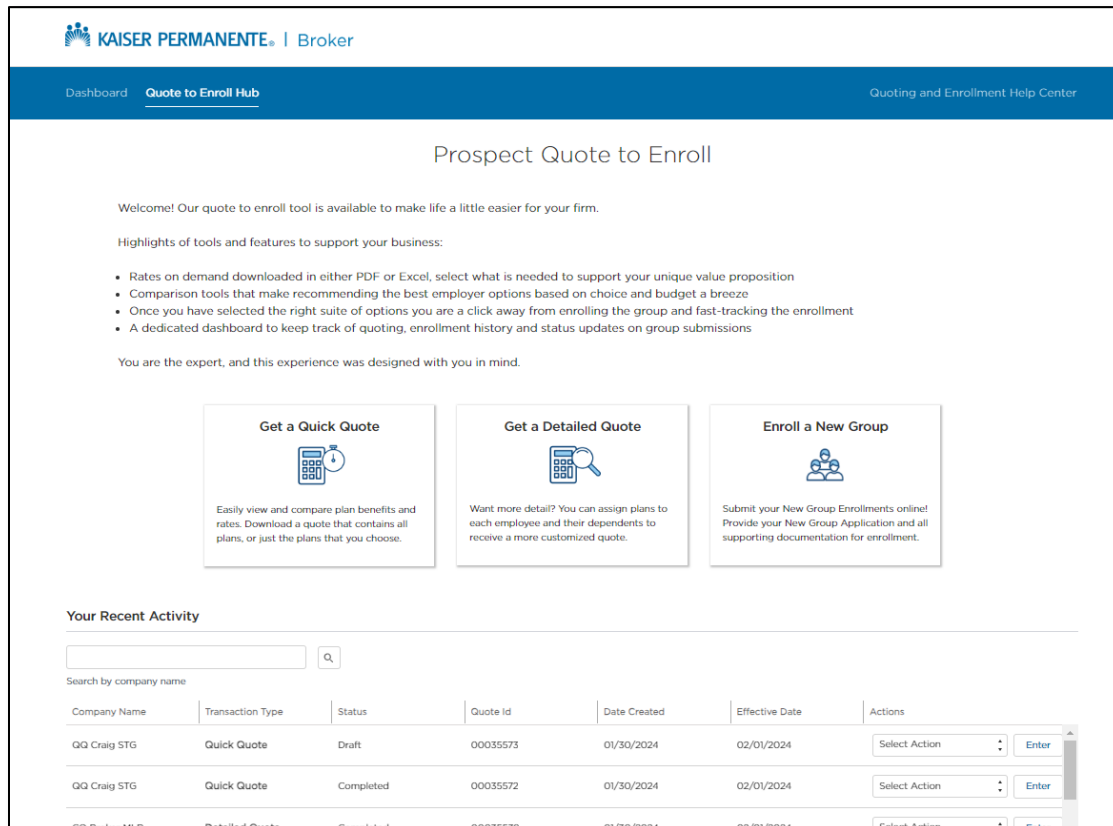
# Where to Locate the Broker Self-Service Tools

1. Login to [account.kp.org](https://account.kp.org).
2. From your Dashboard page, look for the **Prospect Quote to Enroll** section in the lower right corner.
3. Click the link to **Get started now**.

**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 New Quote

- To begin a new quote, click **Get a Quick Quote** then complete the following screens.

 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
QQ Craig STG	Quick Quote	Draft	00035573	01/30/2024	02/01/2024	Select Action <input type="button" value="Enter"/>
QQ Craig STG	Quick Quote	Completed	00035572	01/30/2024	02/01/2024	Select Action <input type="button" value="Enter"/>
CO Broker MLE	Detailed Quote	Completed	00035539	01/30/2024	02/01/2024	Select Action <input type="button" value="Enter"/>

## Group Details

1. Complete all required fields(\*) on the 'Group Details' screen. Note the following:
  - If you cover multiple regions, enter a **Physical Address Zip** and **County** for the service area that matches your log in. Rates are based on the zip code and county.
  - **Hawaii Brokers:** Please complete the **Employer Company Contact** section. Although it is not required, this helps connect the Broker and Group to the proper Hawaii support team.
2. Click **Next** to proceed to the next screen, or click **Cancel** if you wish to discontinue the quote.

### 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.

#### Company Information

\* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING

Georgia

\*LEGAL BUSINESS NAME

QQ Demo

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

Mar 01 2024

Plans and rates are based on the proposed effective date.

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

50

\*HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

7

\*PHYSICAL ADDRESS ZIP

30033

\*COUNTY

DeKalb

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

COMPANY ROLE OR TITLE

EMAIL

PHONE

FAX

Next

Cancel

# Add Employees

There are two preferred methods for entering census information for each employee- 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.

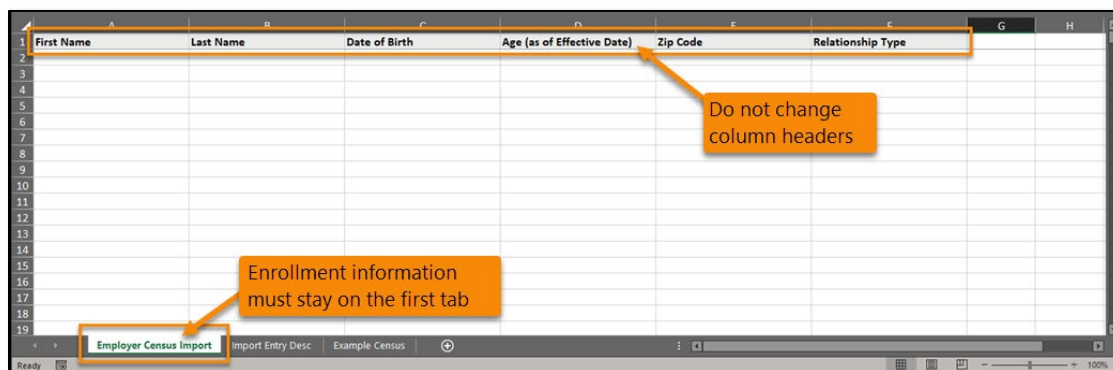
## Upload employees and dependents using the Census Template

The columns and tabs in the census template are arranged and formatted to map directly to the data fields in the quoting tool.

1. In the 'Add Employees', screen, click **Download census template**.

**Note:** If you do not have the zip code for each employee for the Quick Quote, use the group's home office zip code. The zip code is required when you proceed to the New Group Enrollment.

2. On your computer, search your Downloads folder for the excel file **sgBrokerAddSubscribersTemplate**.
3. Open the template in Excel.



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*; however, the subscriber's *Date of Birth* is required when you proceed to the New Group Enrollment.

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

	A	B	C	D	E	F	G	H
1	<b>First Name</b>	<b>Last Name</b>	<b>Date of Birth</b>	<b>Age (as of Effective Date)</b>	<b>Zip Code</b>	<b>Relationship Type</b>		
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								

Refer to this tab for formatting

Employer Census Import   Import Entry Desc   Example Census

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. Verify that the totals for *Employees*, *Dependents* and *Total*, match your spreadsheet.
8. Scroll down the page and verify the employee data.
9. Adjust employee information by typing directly into the fields.
10. **Delete Employee** and **Add Dependent** buttons are also available for your convenience.

EMPLOYEES: 7      DEPENDENTS: 15      TOTAL: 22

Download census template    Upload new census    + Add employee

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

EMPLOYEE 1  
Jason Young      0 Dependents      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

+ Add dependent

EMPLOYEE 2  
Brienne Smith      0 Dependents      Delete Employee 2

**Details**

\*FIRST NAME: Brienne      MIDDLE INITIAL:      \*LAST NAME: Smith      RELATIONSHIP TYPE: Employee

\*DATE OF BIRTH mm/dd/yyyy:      AGE (AS OF EFFECTIVE DATE):      \*ZIP CODE:

**Out of Service Area (Georgia and Colorado only):** When an employee lives outside the service area, a checkbox appears to confirm if the employee works within the service area. If you will be enrolling a group with more than 49% out of area, contact your Kaiser Permanente representative for help.

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

EMPLOYEE 1  
Jason Young      0 Dependents      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: 30000      DOES THE EMPLOYEE WORK IN THE SERVICE AREA? ☒ Yes

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.

+ Add dependent

- Once you have completed adding employees, scroll to the bottom of the page and click **Next** to review the [Quote Summary](#), where you can make quote comparisons and evaluate quote details.

A screenshot of a web form for adding an employee. The form is divided into several sections. The top section contains fields for 'FIRST NAME' (Jane), 'MIDDLE INITIAL' (empty), 'LAST NAME' (Doe), and 'RELATIONSHIP TYPE' (Employee). Below this is a section for 'DATE OF BIRTH' (01/05/1988) with a calendar icon, 'AGE (AS OF EFFECTIVE DATE)' (empty), and 'ZIP CODE' (30016) with a note 'Enter 5-digit zip code'. A '+ Add dependent' button is located below the birth date field. At the bottom right, there are buttons for 'Save Subscribers', '+ Add employee', 'Previous', and 'Next' (highlighted with an orange border). At the bottom left, there are links for 'Cancel' and 'Save for later'.

## Manually add employees

If you prefer to manually enter employees, follow these steps:

- From the 'Add Employees' page, click **Add Employee**.

A screenshot of the 'Add Employees' page. The page has a title 'Add Employees' and a paragraph explaining two ways to add subscribers: manually or by uploading a census. Below the text is a summary table with three columns: 'EMPLOYEES', 'DEPENDENTS', and 'TOTAL', each showing a count of '0'. At the bottom, there are links for 'Download census template', 'Upload census' (with an icon), and '+ Add employee' (highlighted with an orange border).

- Enter the employee information.
- Click **Add Dependent** to add a dependent under the Employee.
- Click **Add Employee** for each additional employee.

A screenshot of the employee information form, similar to the one above. In this version, the '+ Add dependent' button is highlighted with an orange border. At the bottom right, the '+ Add employee' button is also highlighted with an orange border. The 'Next' button is also visible and highlighted with an orange border.



5. When you have completed manually adding employees, click **Next** to generate the quote.

\* FIRST NAME

Jane

MIDDLE INITIAL

\* LAST NAME

Doe

RELATIONSHIP TYPE

Employee

\* DATE OF BIRTH

01/05/1988

mm/dd/yyyy

AGE (AS OF EFFECTIVE DATE)

\* ZIP CODE

30016

Enter 5-digit zip code

+ Add dependent

Save Subscribers

+ Add employee

Previous

Next

Cancel

Save for later

# Quote Summary

The quote is generated once you arrive at the 'Quote Summary' page. Here you can either download all plans, or compare plans and rates before presenting them to your group.

## 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).

**\*Hawaii Brokers:** Composite Rate calculations are not available for self-service quoting in the Hawaii service area. Contact your sales rep for composite rates.

The screenshot shows the 'Quote Summary' page. At the top, it says 'Your quick quote is now complete and ready to download.' Below this, there's a section titled 'Download All Plans Quote'. To the right of this section, there's a radio button selection: 'Choose: ☒ Member Level Rates ☐ Composite Rates'. Below the radio buttons, there are two buttons: 'Download All Plans Quote (.csv)' and 'Download All Plans Quote (.pdf)'. Below these buttons, there's a section titled 'More Options'. 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, 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)	<a href="#">See Rate Details</a>	\$3,909.01	\$4,951.49	<b>\$8,860.50</b>
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Select)	<a href="#">See Rate Details</a>	\$4,104.35	\$5,198.92	<b>\$9,303.27</b>
<input type="checkbox"/> KP MD Gold Q/20/Vision (Signature)	<a href="#">See Rate Details</a>	\$3,614.41	\$4,578.33	<b>\$8,192.74</b>
<input type="checkbox"/> KP MD Gold Q/20/Vision (Select)	<a href="#">See Rate Details</a>	\$3,795.12	\$4,807.23	<b>\$8,602.35</b>

HMO Plus		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input type="checkbox"/> KP MD Platinum HMO Plus Q/10/Vision (Signature)	<a href="#">See Rate Details</a>	\$4,065.46	\$5,149.70	<b>\$9,215.16</b>
<input type="checkbox"/> KP MD Gold HMO Plus Q/20/Vision (Signature)	<a href="#">See Rate Details</a>	\$3,758.99	\$4,761.50	<b>\$8,520.49</b>

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	<b>\$8,860.50</b>
<input type="checkbox"/> KP MD Platinum Q/10/Vision (Select)		\$671.72	\$1,343.44	\$1,309.85	\$1,981.57	<b>\$9,303.27</b>
<input type="checkbox"/> KP MD Gold Q/20/Vision (Signature)		\$591.53	\$1,183.06	\$1,153.48	\$1,745.01	<b>\$8,192.74</b>
<input type="checkbox"/> KP MD Gold Q/20/Vision (Select)		\$621.11	\$1,242.22	\$1,211.16	\$1,832.27	<b>\$8,602.35</b>

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	

## 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.

1. 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.

Your quick quote is now complete and ready to download.

Generating Document

Gathering complete(s)

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.
4. 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

PPO HDHP/7250/10/S11 - OGA Bronze See Rate Details \$519.60 \$0.00 \$519.60

Download Select Plans Quote (.pdf) Compare Plans

## Compare Select Plans and Rates

If you prefer, you can compare and download specific plans.

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

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"

1

SEARCH  
  
Search by plan name  
  
PRODUCT TYPE  
☐ KP Plans  
☐ KP Virtual Complete Plans  
☐ HDHP Plans  
☐ KP Plus  
☐ Dual Choice PPO  
  
METAL TIERS  
☐ Platinum  
☐ Gold  
☐ Silver  
☐ Bronze  
  

Apply Filters

  
Remove all filters

2

KP Plans		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium	
<input checked="" type="checkbox"/>	KP/0/0/20/511 Platinum	See Rate Details	\$5,939.28	\$7,478.05	\$13,417.31
<input type="checkbox"/>	KP/500/20/20/511 Platinum	See Rate Details	\$5,799.61	\$7,302.21	\$13,101.82
<input type="checkbox"/>	KP/0/0/30/511 Gold	See Rate Details	\$5,514.17	\$6,942.80	\$12,456.97
<input type="checkbox"/>	KP/0/0/40/511 Gold	See Rate Details	\$5,483.80	\$6,904.59	\$12,388.39
<input type="checkbox"/>	KP/1000/20/30/511 Gold	See Rate Details	\$5,398.79	\$6,797.57	\$12,196.36
<input type="checkbox"/>	KP/2000/0/30/511 Gold	See Rate Details	\$5,368.44	\$6,759.36	\$12,127.80
<input type="checkbox"/>	KP/2250/20/30/511 Gold	See Rate Details	\$5,143.72	\$6,476.36	\$11,620.08
<input type="checkbox"/>	KP/2500/0/30/511 Gold	See Rate Details	\$5,283.41	\$6,652.25	\$11,935.66
<input type="checkbox"/>	KP/3500/0/30/511 Gold	See Rate Details	\$5,107.30	\$6,430.52	\$11,537.82
<input type="checkbox"/>	KP/3750/20/30/511 Gold	See Rate Details	\$4,991.91	\$6,285.28	\$11,277.19
<input type="checkbox"/>	KP/4500/0/30/511 Gold	See Rate Details	\$4,943.31	\$6,224.09	\$11,167.40
<input type="checkbox"/>	KP/2700/35/50/511 Silver	See Rate Details	\$4,755.08	\$5,987.06	\$10,742.14
<input type="checkbox"/>	KP/3700/35/50/511 Silver	See Rate Details	\$4,615.39	\$5,811.18	\$10,426.57
<input checked="" type="checkbox"/>	KP/4700/35/50/511 Silver	See Rate Details	\$4,487.87	\$5,650.60	\$10,138.47
<input type="checkbox"/>	KP/5500/0/50/511 Silver	See Rate Details	\$4,688.26	\$5,902.92	\$10,591.18
<input type="checkbox"/>	KP/6000/30/50/511 Silver	See Rate Details	\$4,366.40	\$5,497.69	\$9,864.09



3

Download Select Plans Quote (.pdf)

Compare Plans

KP Virtual Complete Plans	Total	Total	*Total Monthly
---------------------------	-------	-------	----------------

4. The 'Plan Comparison' page opens. Review the details.

 KAISER PERMANENTE®  HPI HEALTH PLAN INSTITUTE

Author: SK | V3 | Publish Date: 2/20/24 | Page 13

5. Scroll to the bottom and click **Go back to Plans and Rates**.

Plan Comparison		
Plan Name	KP/4700/35/50/S11 Silver	KP/0/0/20/S11 Platinum
*Monthly Premium	\$10,138.47/mo	\$13,417.31/mo
Deductible	\$4,700 Ind; \$9,400 Fam	\$0 Ind; \$0 Fam
Out Of Pocket Max	\$9,100 Ind; \$18,200 Fam	\$2,500 Ind; \$5,000 Fam
Primary Care Visits	\$50	\$20
Emergency Visits	35% After DED	\$350
Inpatient Hospitalization	35% After DED	\$500 Copay Per Day
Prescriptions		
Generic	\$20	\$10
Brand	\$50	\$40
Non-Preferred	\$80	\$60
Specialty	35%	25%

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

[Go back to Plans and Rates](#)

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

## View and Download Rate Details

When viewing the 'Quote Summary' by **Member Level Rates**, you have the option to review and download rate details for any plan.

1. Click the **See Rate Details** link for any plan.

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"				
		<a href="#">Download Select Plans Quote (.pdf)</a>	<a href="#">Compare Plans</a>	
SEARCH				
Search by plan name				
PRODUCT TYPE				
<input type="checkbox"/> KP Plans				
<input type="checkbox"/> KP Virtual Complete Plans				
<input type="checkbox"/> HDHP Plans				
<input type="checkbox"/> KP Plus				
<input type="checkbox"/> Dual Choice PPO				
METAL TIERS				
<input type="checkbox"/> Platinum				
<input type="checkbox"/> Gold				
<input type="checkbox"/> Silver				
<input type="checkbox"/> Bronze				
<a href="#">Apply Filters</a>				
KP Plans		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/> KP/0/0/20/S11 Platinum	<a href="#">See Rate Details</a>	\$5,939.28	\$7,478.03	\$13,417.31
<input type="checkbox"/> KP/500/20/20/S11 Platinum	<a href="#">See Rate Details</a>	\$5,799.61	\$7,502.21	\$13,101.82
<input type="checkbox"/> KP/0/0/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,514.17	\$6,942.80	\$12,456.97
<input type="checkbox"/> KP/0/0/40/S11 Gold	<a href="#">See Rate Details</a>	\$5,483.80	\$6,904.59	\$12,388.39
<input type="checkbox"/> KP/1000/20/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,398.79	\$6,797.57	\$12,196.36
<input type="checkbox"/> KP/2000/0/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,368.44	\$6,759.36	\$12,127.80
<input type="checkbox"/> KP/2250/20/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,143.72	\$6,476.36	\$11,620.08
<input type="checkbox"/> KP/2500/0/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,283.41	\$6,652.25	\$11,935.66
<input type="checkbox"/> KP/3500/0/30/S11 Gold	<a href="#">See Rate Details</a>	\$5,107.30	\$6,430.52	\$11,537.82
<input type="checkbox"/> KP/3750/20/30/S11 Gold	<a href="#">See Rate Details</a>	\$4,991.91	\$6,285.28	\$11,277.19

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

## KP/O/O/20/S11 Platinum

**Rate Details**

TOTAL EMPLOYEE PREMIUM	TOTAL DEPENDENT PREMIUM	TOTAL MONTHLY EMPLOYER PREMIUM
<b>\$5,939.28</b>	<b>\$7,478.03</b>	<b>\$13,417.31</b>

[Download Rate Details \(.pdf\)](#)
[Download Rate Details \(.xlsx\)](#)

EMPLOYEE	AGE	RELATIONSHIP	MEMBER RATE	TOTAL FAMILY PREMIUM
1. Jason Young	35	Employee	\$703.48	
				\$703.48
2. Brianne Smith	47	Employee	\$899.79	
				\$899.79
3. Gordon Ramsey	63	Employee	\$1,699.40	
Dependent 1	59	Spouse	\$1,498.49	
				\$3,197.89
4. David Hall	21	Employee	\$575.68	
Dependent 1	20	Spouse	\$558.41	
Dependent 2	7	Child	\$440.39	
Dependent 3	7	Child	\$440.39	
Dependent 4	4	Child	\$440.39	

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

Dependent 3	19	Child	\$541.71	
				\$2,636.61
7. David King	25	Employee	\$577.98	
Dependent 1	19	Spouse	\$541.71	
				\$1,119.69

[Return to Quote Summary](#)

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

## Download Select Plans

After locating the best plans options, download a 'Select Plans' Quote for a more detailed plan comparison to present to your client.

1. Check the box for any number of plans you want to include in the 'Select Plans' Quote.
2. Click **Download Select Plans Quote (.pdf)**

**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](#)

**SEARCH**

[Search](#)

Search by plan name

**PRODUCT TYPE**

☐ HMO  
☐ DHMO  
☐ DHMO Plus  
☐ HSA  
☐ HSA Plus  
☐ ST POS  
☐ ST POS Deductible  
☐ PPO  
☐ HMO Select  
☐ DHMO Select  
☐ HSA Select

**METAL TIERS**

☐ Platinum  
☐ Gold  
☐ Silver  
☐ Bronze

**NETWORK**

☐ Standard  
☐ Select

**HMO**

		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/>	KP CO Platinum 0/10 RX Copay <a href="#">See Rate Details</a>	\$4,776.61	\$6,003.54	<b>\$10,780.15</b>
<input type="checkbox"/>	KP CO Gold 0/20 RX Copay <a href="#">See Rate Details</a>	\$4,284.86	\$5,385.45	<b>\$9,670.31</b>

**DHMO**

		Total Employee Premium	Total Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/>	KP CO Platinum 400/10 <a href="#">See Rate Details</a>	\$4,528.41	\$5,691.58	<b>\$10,219.99</b>
<input type="checkbox"/>	KP CO Gold 500/25 <a href="#">See Rate Details</a>	\$4,094.48	\$5,146.19	<b>\$9,240.67</b>
<input checked="" type="checkbox"/>	KP CO Gold 1500/25 RX Copay <a href="#">See Rate Details</a>	\$3,953.90	\$4,969.49	<b>\$8,923.39</b>
<input type="checkbox"/>	KP CO Gold 2500/10 <a href="#">See Rate Details</a>	\$3,792.68	\$4,766.84	<b>\$8,559.52</b>
<input type="checkbox"/>	KP CO Silver 2800/45 <a href="#">See Rate Details</a>	\$3,383.64	\$4,252.75	<b>\$7,636.39</b>
<input type="checkbox"/>	KP CO Silver 4000/50 RX Copay <a href="#">See Rate Details</a>	\$3,426.27	\$4,306.38	<b>\$7,732.65</b>
<input type="checkbox"/>	KP CO Silver 5000/10 <a href="#">See Rate Details</a>	\$3,127.00	\$3,930.22	<b>\$7,057.22</b>
<input type="checkbox"/>	KP CO Virtual Complete Silver 6300/50 RX Copay <a href="#">See Rate Details</a>	\$3,200.44	\$4,022.48	<b>\$7,222.92</b>
<input type="checkbox"/>	KP CO Bronze 7000/60 RX Copay <a href="#">See Rate Details</a>	\$3,141.34	\$3,948.24	<b>\$7,089.58</b>

3. Open the 'Select Plans' PDF from your computer to review. Scroll through the document to locate the following resource 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 options for the following:

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.

	See Rate Details	\$550.42	\$0.00	\$550.42
<input type="checkbox"/> PPO HDHP/5000/20/S11 - OOA Silver	See Rate Details	\$500.42	\$0.00	<b>\$500.42</b>
<input type="checkbox"/> PPO HDHP/7250/10/S11 - OOA Bronze	See Rate Details	\$519.60	\$0.00	<b>\$519.60</b>

[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

# 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(\*). 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, or click **Cancel** if you do not wish to proceed.

### Group Details

#### Company Information

\* indicates required field

REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING  
Colorado

\*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"/>
COMPANY ROLE OR TITLE	EMAIL	
<input type="text"/>	<input type="text"/>	
PHONE	FAX	
<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**.

**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

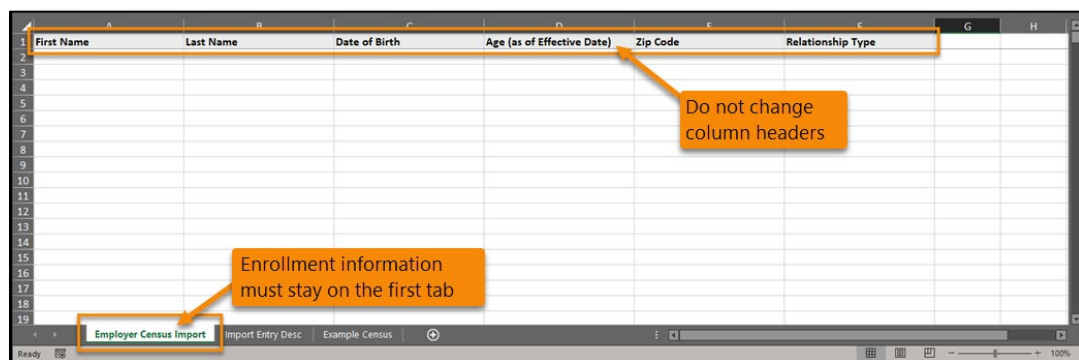
This option provides you the ability to manually enter general Membership information. Selecting this option requires the completion of the Employee Enrollment Application located at the Required Documents page.

[+ Add employee](#)

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

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

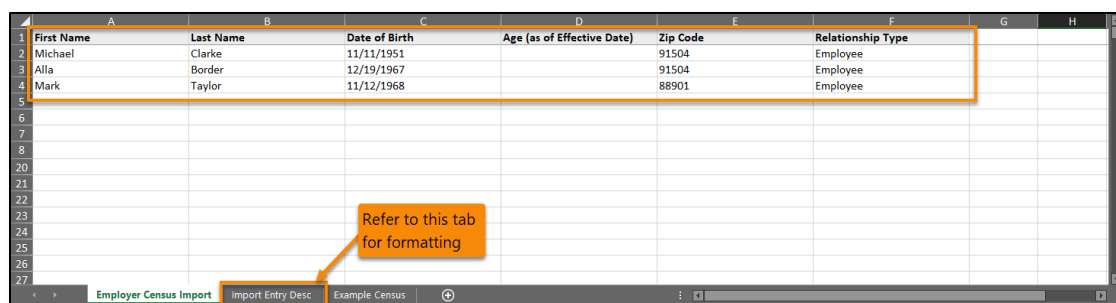
**Note:** Do not change the column headers or tabs in the census template, these map directly to the required fields in the quoting tool.



4. 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.



5. 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 a subscriber lives outside the service area zip code, a checkbox appears to confirm if the employee works within the service area. Out of area Employees only qualify for 'PPO' plans. Employees in the service area only qualify for non-'PPO' plans.

When more than 49% of the subscribers live and work outside of the service area, you will not see a Next button and 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.

The screenshot displays a web form for enrolling an employee and their dependents. The form is divided into two main sections: 'Details' for the employee and 'Dependent 1' for a family member. In the 'Details' section, the employee's first name is 'David', last name is 'King', and relationship type is 'Employee'. The date of birth is '04/08/1970' and the age is '53'. The zip code is '80014'. In the 'Dependent 1' section, the date of birth is also '04/08/1970' and the age is '53'. The relationship type is 'Spouse'. There are buttons for '+ Add dependent', '+ Add employee', 'Previous', 'Next', and 'Cancel'. The 'Next' button is highlighted with an orange border. The form also includes a 'Save Subscribers' link and a 'Delete dependent 1' link.

**Details**

\*FIRST NAME: David MIDDLE INITIAL: RELATIONSHIP TYPE: Employee

\*LAST NAME: King

\*DATE OF BIRTH mm/dd/yyyy: 04/08/1970 AGE (AS OF EFFECTIVE DATE): 53 \*ZIP CODE: 80014

mm/dd/yyyy Enter 5-digit zip code

**Dependent 1**

\*DATE OF BIRTH mm/dd/yyyy: 04/08/1970 AGE (AS OF EFFECTIVE DATE): 53 \*RELATIONSHIP TYPE: Spouse

mm/dd/yyyy Delete dependent 1

+ Add dependent

Save Subscribers + Add employee

Previous Next

Cancel



## To manually enter employees

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 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](#)

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.

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

EMPLOYEE 1 Delete Employee 1

Jane Doe 0 Dependents

**Details**

*FIRST NAME Jane	MIDDLE INITIAL 	*LAST NAME Doe	RELATIONSHIP TYPE Employee
*DATE OF BIRTH mm/dd/yyyy 08/09/1965	AGE (AS OF EFFECTIVE DATE) 	*ZIP CODE 21401	

mm/dd/yyyy Enter 5-digit zip code

[+ Add dependent](#)

Save Subscribers [+ Add employee](#)

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

# Plan Selection

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

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

The screenshot shows the 'Plan Selection' interface. On the left, a sidebar contains a search bar and filter sections for Product Type, Metal Tiers, and Network. A red circle with the number '1' highlights the filter sections. The main area on the right lists plans under three categories: HMO, HMO Select, and DHMO. A red circle with the number '2' highlights the first plan in the HMO list, 'KP CO Platinum Q/10 RX Copay', which has a checked checkbox.

**Plan Selection**

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.  
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.  
"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.

**SEARCH**

Search by plan name

**PRODUCT TYPE**

- ☐ HMO
- ☐ HMO Select
- ☐ DHMO
- ☐ DHMO Select
- ☐ DHMO Plus
- ☐ POS HMO
- ☐ HSA
- ☐ HSA Select
- ☐ PPO
- ☐ POS DHMO
- ☐ HSA Plus
- ☐ Virtual Complete
- ☐ Virtual Complete Select
- ☐ POS DPHSA

**METAL TIERS**

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

**NETWORK**

- ☐ Standard
- ☐ Select

**HMO**

- ☒ KP CO Platinum Q/10 RX Copay
- ☐ KP CO Gold Q/20 RX Copay

**HMO Select**

- ☐ KP Select CO Platinum Q/10 RX Copay
- ☐ KP Select CO Gold Q/20 RX Copay

**DHMO**

- ☒ KP CO Platinum 400/10
- ☐ KP CO Gold 500/25
- ☐ KP CO Gold 1500/25 RX Copay
- ☐ KP CO Gold 2500/10
- ☒ KP CO Silver 2800/45
- ☐ KP CO Silver 4000/50 RX Copay
- ☐ KP CO Silver 5000/10
- ☐ KP CO Bronze 7000/60 RX Copay

**DHMO Select**

- ☐ KP Select CO Platinum 400/10
- ☐ KP Select CO Gold 500/25

3. Click **Next**.

# Plan Assignments

1. Assign a medical plan to each employee using the drop down menu.

The screenshot shows the 'Plan Assignments' page. At the top, there is a progress bar with four steps, the third of which is highlighted. Below the title 'Plan Assignments', a message states: 'Please choose plans for each employee listed below. When plan assignments are complete, select Next.' There are two search boxes: 'SEARCH EMPLOYEES' and 'SORT EMPLOYEES'. Below the search boxes, it says '7 of 7 employees'. A note specifies: '"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.' The first employee, Jason Young, is listed with details: FIRST NAME: Jason, LAST NAME: Young, DATE OF BIRTH: 02/05/2000, AGE AT EFFECTIVE DATE: 23, ZIP CODE: 80014. A dropdown menu for 'SELECT A MEDICAL PLAN' is open, showing options: 'Select a medical plan...', 'KP CO Platinum 0/10 RX Copay', 'KP CO Platinum 400/10', 'KP CO Gold 3T POS 1500/30', and 'KP CO Silver 2800/45'. The second employee, Brianne Smith, is partially visible below.

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

The screenshot shows the 'Plan Assignments' page for the second employee, Gordon Ramsey. His details are: FIRST NAME: Gordon, LAST NAME: Ramsey, DATE OF BIRTH: 03/30/1965, AGE AT EFFECTIVE DATE: 58, ZIP CODE: 80014. The 'SELECT A MEDICAL PLAN' dropdown menu is open, showing the selected option: 'KP CO Platinum 400/10'. Below the dropdown, a button labeled 'View Gordon's covered dependents' is highlighted with an orange box. Below this button, the dependent information is shown: 'Dependent 1', RELATIONSHIP: Spouse, DATE OF BIRTH: 01/01/1969.

3. Click **Next** to continue.

## Rating Type

Select the rating type for the Detailed Quote.

1. Click **Member Level** or **Composite\***.  
\* Composite rating is only available when there are 2 or more subscribers for each medical plan offered.
2. Click **Next** to generate the Detailed Quote.

### 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

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

## Detailed Quote Summary

1. Scroll down the page to review the Quote Summary.
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 2024 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: **DQ Demo**  
Effective Date: **02/01/2024**  
Zip Code: **80014**  
County: **Arapahoe**  
Employee Count: **7**  
Member Count: **22**  
Rating Type: **Composite**

TOTAL MONTHLY MEDICAL PREMIUM



**\$12,957.32**

**Medical Rate Details** [Expand All](#) | [Collapse All](#)

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	TIER	MEDICAL PLAN	EMPLOYEE AND DEPENDENT TOTAL
✓ 1. Gordon Ramsey	Employee	58	EMPLOYEE + SPOUSE	KP CO Platinum 400/10	
	Spouse	55			
					<b>\$1,912.52</b>
✓ 2. David Hall	Employee	53	EMPLOYEE + FAMILY	KP CO Platinum 400/10	
	Spouse	43			
	Child	6			
	Child	6			
	Child	6			
	Child	6			
					<b>\$2,725.34</b>
✓ 3. David King	Employee	53	EMPLOYEE + SPOUSE	KP CO Platinum 400/10	
	Spouse	53			

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 enrollment using the data you already entered for the quote. For complete steps, refer to job aid [.02: Generate New Self Service Group Enrollment](#).
  - **Requote this Group:** If you need to make changes to the quote, you can requote using the data you already entered. Refer to the [Requote](#) section of this document.



## 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.

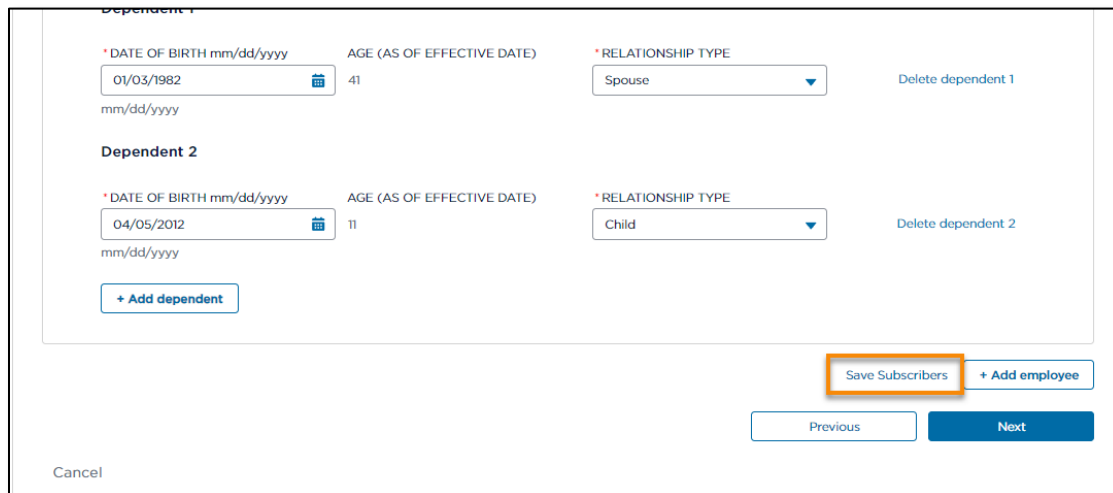


A screenshot of a form with fields for PHONE and FAX. A blue 'Next' button is on the right. A 'Cancel' button in the bottom left corner is highlighted with an orange rectangle.

### Save Quick Quote Subscribers for Later

Quick Quotes 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 Quick Quote 'Add Employees' screen, click **Save Subscribers**.



A screenshot of the 'Add Employees' screen. It shows two dependent sections with birth dates, ages, and relationship types. At the bottom, the 'Save Subscribers' button is highlighted with an orange rectangle. Other buttons include '+ 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.
6. Select **Resume Quote**.

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

Get a Quick Quote

Get a Detailed Quote

Enroll a New Group

Your Recent Activity

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 Detailed Quote 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

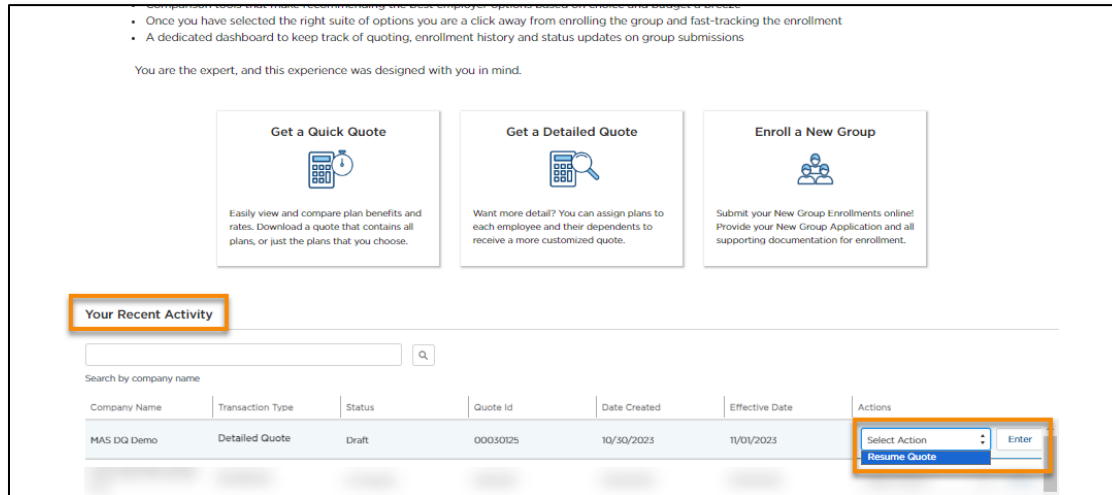
\* DATE OF BIRTH mm/dd/yyyy 04/05/2012 AGE (AS OF EFFECTIVE DATE) 11 \* RELATIONSHIP TYPE Child Delete dependent 2

+ Add dependent

Save Subscribers + Add employee Previous Next

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.

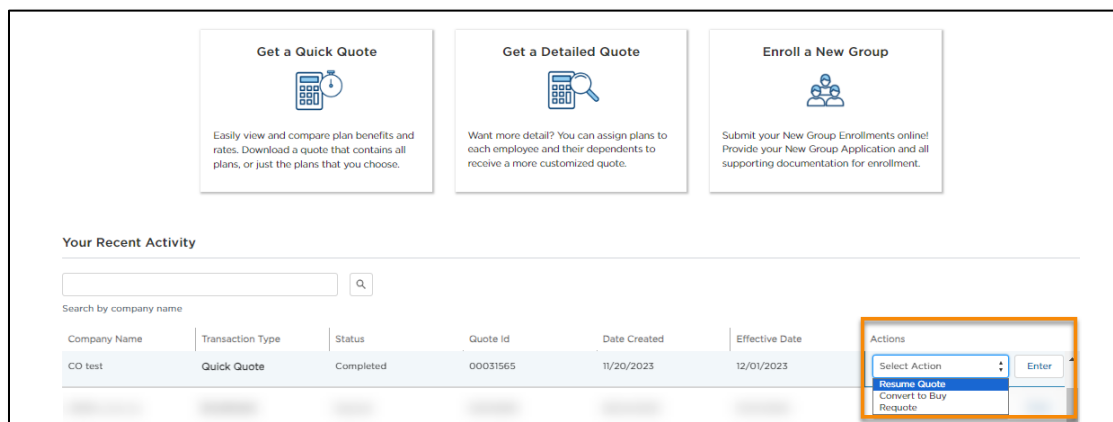


## Convert a Quick Quote to a Detailed Quote

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 a Quick Quote beginning from the 'Prospect Quote to Enroll' page

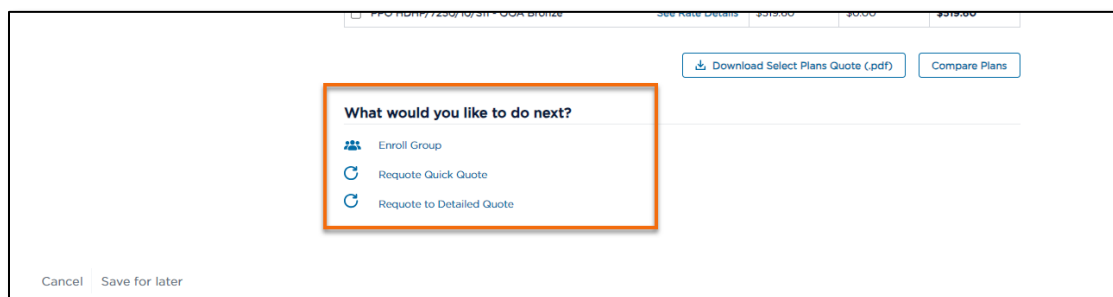
1. Go to the **Prospect Quote to Enroll** page.
2. Search for the Group Name/Quick Quote under 'Your Recent Activity'.
3. Click the Actions menu and select **Resume Quote**.
4. Click **Enter**.



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

### Convert a Quick Quote 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**.



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/0/0/20/511 - OOA Platinum	<a href="#">See Rate Details</a>	\$777.90	\$0.00	<b>\$777.90</b>
<input type="checkbox"/> PPO/1000/20/30/511 - OOA Gold	<a href="#">See Rate Details</a>	\$700.62	\$0.00	<b>\$700.62</b>
<input type="checkbox"/> PPO/2500/10/30/511 - OOA Gold	<a href="#">See Rate Details</a>	\$652.57	\$0.00	<b>\$652.57</b>
<input type="checkbox"/> PPO/3850/30/50/511 - OOA Silver	<a href="#">See Rate Details</a>	\$582.79	\$0.00	<b>\$582.79</b>
<input type="checkbox"/> PPO/4850/30/50/511 - OOA Silver	<a href="#">See Rate Details</a>	\$565.24	\$0.00	<b>\$565.24</b>
<input type="checkbox"/> PPO HDHP/3800/20/511 - OOA Silver	<a href="#">See Rate Details</a>	\$580.69	\$0.00	<b>\$580.69</b>
<input type="checkbox"/> PPO HDHP/5000/20/511 - OOA Silver	<a href="#">See Rate Details</a>	\$550.47	\$0.00	<b>\$550.47</b>
<input type="checkbox"/> PPO 6500/20/60/511 - OOA Bronze	<a href="#">See Rate Details</a>	\$500.42	\$0.00	<b>\$500.42</b>
<input type="checkbox"/> PPO HDHP/7250/10/511 - OOA Bronze	<a href="#">See Rate Details</a>	\$519.60	\$0.00	<b>\$519.60</b>

[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>

4. After Requote is selected, the system will begin a new Quick Quote with the group information you previously entered.
5. 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 plan details. The total monthly premium is \$12,957.32. Below this is a section titled 'Your Kaiser Permanente Portfolio' which contains a table of medical plans and their rates.

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 border. 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 has a blue header with 'Dashboard' and 'Quote to Enroll Hub' tabs. The main content area is titled 'Prospect Quote to Enroll' and contains a welcome message and a list of highlights. Below this are three cards: 'Get a Quick Quote', 'Get a Detailed Quote', and 'Enroll a New Group'. At the bottom, there is a section titled 'Your Recent Activity' with a search bar and a table of recent activity.

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

The 'Requote' button in the Actions column is highlighted with an orange border. At the bottom right, there is an 'Enter' button.

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.