Navigating Your Dashboard

Log into account.kp.org using your existing login credentials.

On the broker dashboard, there are three sections relevant to self-service capabilities. The first section is Quote and Enroll new clients. You can get a small business quote or enroll a small business by clicking the corresponding link. The second section is Review Your Renewals and upcoming renewals are listed and grouped by renewal month and year. Click View More to see the group's renewing that month.

Click the group name to access the group's page to make plan changes, generate quotes, or review their renewal packet. Groups can update some of their group information by clicking here.

If you don't see a group in the list, and if you've acquired the group within the past 90 days, it won't be listed in the review your renewals section. Use the search field or view entire book of Business Link to find it. Clicking the view entire book of Business Link will take you to all your groups regardless of where they are in the renewal cycle. Your small business groups will all be listed on the small business tab. Use the search and filter fields to find the group. Click home from any screen to go back to the dashboard.

Scroll down for the third section related to self-service transactions called Recent quote group, Enrollment, and Renewal transactions. This section gives the transaction history for your self-service sell & renew transactions. Each transaction and its corresponding status are listed. You can filter the columns using the drop-down menus. For transactions with the status of action required, there is an action needed from you. Kaiser Permanente has reviewed the transaction and submitted it back to you for additional information. These transactions will have contact information for Kaiser Permanente representative in the instructions field. That representative will contact you to provide support with completing the transaction. A status of pending KP review indicates transactions that have been submitted and are undergoing review for approval. Transactions with an open status mean that it is still in progress and was saved prior to submitting. You can return to the transaction to keep working on it. Fully completed and approved transactions have the status of completed.

You can filter by the created date of the transaction or search for a transaction specific to a particular group by entering the group ID into the search field. Note that open and completed transactions will have a blue ID number you can click and view the transaction, and for open transactions, you can continue working on it. When you click an open transaction, you can save it, go back to the prior step, or go on to the next step towards completing and submitting it.

You can also close the transaction which opens the confirmation dialog box. Clicking close will close the transaction without saving it and return to the dashboard. You can also cancel the transaction which will withdraw the transaction. Clicking cancel opens the confirmation dialog box. If you click yes, you will receive this message on the dashboard. The transaction is no longer listed on the transactional history list.