Enrolling a Small Business

From the dashboard, click "enroll a small business". Please note that the information on the screens mimics the current paper enrollment form. This video will feature required fields but fill in as many optional fields as you can. If there is a question mark by a field, click it for more information about the field. On the group detail screen, fill in the business name, address, and phone number. Select the type of business and enter the In business since date.

Enter the 9-digit federal tax ID number and enter your 6 digits NAICS. If you don't know the NAICS code, click the magnifying glass to look it up. If you have workers comp or if it is pending, select the option and select the carrier from the pull-down menu. If you select other, then another field opens where you will enter the carrier's name. Enter the policy number, "unknown" or "pending" are acceptable entries in this field if the company is exempt from providing workers comp you will need to enter the reason. Answer the other medical coverage questions, and other fields will open. If you selected yes, select or enter the responses. Select whether the company files a combined tax return with another company. Enter the total number of employees, eligible employees, and enrolling employees. Designate the number of hours needed to be eligible for coverage and whether dependent coverage will be offered.

If the company has 2 to 19 employees select who will administer the active group billing. If the company has more than 20 employees, select who will administer the federal COBRA billing if it is a TPA. Also, select who will administer the active group billing. Select whether the company is subject to ERISA. Click next.

On the contact's screen designate the contract signer. Enter the e-mail address and correspondence preference. Click Add Contact so that the signer is listed, and their information can be added. There can only be one contract signer when enrolling in a small business, the contact cannot be removed. If you are using a TPA, there will be a section where you can add the TPA contact information. If you are not using a TPA, the contract signer will be listed as the billing contact. You can change that to another person if needed. Click Add Contact. The billing contact is now listed and can be edited.

Add an interested party if applicable. Select the delivery preference for the contract and renewals. Click next. On the broker slash agent information page. Find the agent who is the owner of this account and click select agent. You can change the agent with the change link. Click next.

To add subscribers, there are three options available to use for enrollment. Click either the Membership enrollment spreadsheet or quick subscriber upload link and upload an Excel spreadsheet or click

manually add subscribers and enter their information in the boxes. Detailed instructions for these options are available on the adding subscriber's video. When the subscribers are added, click next.

On the plan selection screen, you can compare and add plans. Click compare plan benefits from the list of available plans. Select up to three plans to compare by putting a checkmark in the box to the left of the plan name. Click View comparison. A window opens with information for these plans, such as deductibles, copayments, and coinsurance amounts for common services and prescription drug costs.

If you find a plan you want to add, scroll to the bottom and put a checkmark by select plan. Click add to the portfolio. You will see a confirmation and the new plan is now in the portfolio list. To add plans, click add medical plans, select them and click add plans to portfolio. If you don't want to add them, click undo add plans. You'll see a confirmation message.

If you're adding a dental plan, click this link and repeat the process. Click next.

On the plan assignment screen, if more than one medical plan is offered, select each member's plan from the pull-down menu. Click next. On the rating type and contribution tab the rating type will be member level. Select specifics for employer contributions and other fields will open based on your selections. Click next.

On the review rates tab, you can see rating and contribution information and group-level premiums for the specified plans.

Premiums for each subscriber are listed and you can see an overview as well as detailed information by clicking the medical or dental tabs. Click next.

On the required documents screen, the documents that must be uploaded are listed. You can download the forms from this link. Download the new group broker of record authorization form, and if listed, the Employer Spreadsheet Disclosure. Fill out the broker information and then have the contract signer sign the forms. Upload the signed documents.

With the other required documentation, upload the documents listed by either dragging and dropping into the designated space or by clicking select files and browsing to the file location. The document name will be listed and select the document type from the Pull-down menu. Enter any relevant comments. Click attach. If you don't click this button, the documents will not be sent with the transaction. Make sure all required documents are listed in the documents uploaded list. You can

download to remove documents using the links to the right. Click next. On the attestation page review the attestation, then fill out your name and title, provide your signature, and click Accept Signature.

Please include the name and contact information of the person in charge of this transaction, as well as any comments. Click submit. You will see a confirmation message. Click close.

You can see the new enrollment in the transaction history. It will not yet have a group ID.

You will also receive an e-mail that your submission is being processed.

If additional information is needed, you will receive this notification and a Kaiser Permanente representative will contact you to assist with the transaction.

When your enrollment has been approved, you will receive an e-mail and welcome letter. The letter contains information about being an enrolled group and the plan portfolio with rates and contributions.