How to Generate a New Self Service Quick Quote

In this video, we will show you how to generate a Quick Quote so you can compare benefits and generate a quote proposal.

Once you are logged into account.kp.org, you will see your Broker Dashboard.

Click the Prospect Quote to Enroll link located in the lower right corner.

In the Prospect Quote to Enroll screen, click Get a Quick Quote to start a new Quote.

In the Group Details screen, complete all the required fields.

Next, complete the Employer Company Contact information.

Click Next to proceed or Cancel to end the Quick Quote process.

We are ready to add census information for each employee.

There are two preferred methods to do so.

Upload using the census template or by manual entry.

The Census Template is the preferred method for loading employee information because the template's columns and tabs are arranged and formatted to map directly to the data fields in the quoting tool.

Click the Download Census template link.

Open the downloaded template from your computer.

Please note: Do not change the column headers.

Also, do not move the Employer Census Import tab.

Enrollment information must always stay on the first tab.

Enter all employee information in the template.

Refer to the Import Entry Description tab for help with formatting the data.

When done, save the spreadsheet to your computer.

Return to the Add Employees screen.

Click the Upload census button and upload the census template from your computer.

Next, verify that the totals for Employees, Dependents, and Total match the spreadsheet.

Scroll down the screen to review employee information.

You can manually adjust any of the information in the fields, if needed.

At any time throughout the process, you can upload a new Census.

The new Census will overwrite all employee data.

The second method for entering employee information is manual entry.

Click the Add Employee button.

Complete the required fields for each employee.

Click Add Employee for any additional members you want to add.

This is also where you can add dependents and partners.

If you have several employees to enter, or if you need to revisit a Previous screen, be sure to click Save Subscribers to ensure your work is being saved.

Once all employees are added, click Next to continue to the Quote Summary.

From the Quote Summary screen, you can download the All Plans Quote, compare plans and evaluate the details.

Choose the radio button for either Member Level Rates or Composite Rates to modify the view of your downloaded All Plans quote.

Next, download the plans.

There are two options.

The csv option is an Excel file that contains both Member Level and Composite rates, on separate tabs.

The pdf option contains either Member Level or Composite rates, based on which selection you made.

Please note, for large downloads, processing time can be long.

If needed, close out the dialog box to end the export process and download later.

Once the document has downloaded to your computer, open it and review it.

If you do find issues in the document, return to the Quote Summary screen, scroll down, and select Requote this group.

If you do not find any issues in the document, return to the Quote Summary screen to compare plans.

To compare plans, search by plan name or use the filters to narrow results.

You can also scroll through the plan list to locate the desired plan.

Select up to three plans to compare by selecting the check boxes next to your choice, then click the Compare Plans button.

Review the information displayed in the Plan Comparison screen.

When done, click the Go back to Plans and Rates button.

Click the See Rate Details link for any plan.

Note that a review of rate details is only available for one plan at a time.

After completing the review, click the Return to Quote Summary link.

Repeat the review steps as often as required.

To download the quote, from the Quote Summary.