How to Generate a Self Service New Group Enrollment

In this video, we will demonstrate how easy it is to convert your quote and submit a new self-service Group Enrollment.

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.

There are two ways to begin new group enrollment.

First, if you have previously completed a Quick Quote for the group, you can begin at “Your Recent Activity.”

Locate the business name and under Actions, select Convert to Buy.

Click Enter.

Second, if you did not previously complete a Quick Quote, you can begin the enrollment process by clicking the Enroll a New Group box.

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

TIP: If your company has worker’s compensation but does not know the policy number, enter Unknown in the policy number field.

Click Next to continue.

In the Group Eligibility screen, complete the required fields.

From this point onwards, you may click Save for Later if you need to continue the work later.

We will show you how to return to your saved work later in this video.

Click Next to continue.

In the Contacts screen, complete all the required fields.

Click Next.

In the Confirm Agent of Record screen, complete the Broker or Agent details.

Click Next to add employees.

In the Add Employees screen, there are three ways to add employees.

Note that if you have previously completed a Quick Quote, you will see the census information

here, instead of these three options.

The preferred option is to use the Membership Enrollment Spreadsheet.

This option replaces the need for an Employee Enrollment form.

First, download the Enrollment Spreadsheet Template.

Open the spreadsheet from your computer’s download folder.

Enter all the subscriber information needed for enrollment.

Refer to the Instructions tab if you need help.

It is important that you do not move columns and tabs, or rename any of the column headers.

Once you have entered all the details, save the spreadsheet to your computer.

Return to the Add Employees screen and click Upload New Spreadsheet.

Select the saved template from your computer and click Open.

The second way to add employees is through Upload Census.

This option requires completion of the Employee Enrollment application.

Click Download Census Template to begin.

Next, open the template from your computer and enter the general employee information.

Do not make any modifications to the headers or tabs in the spreadsheet.

Save it.

Return to the Add Employees screen and click Upload New Census.

Upload the census from your computer.

Please note: Anytime you upload a new spreadsheet or census, any employee data you have already entered will be overwritten.

The third way to add employees is to manually add them.

This option requires completion of the Employee Enrollment form.

Click the Add Employee button.

Complete the required fields for each employee.

Click Add Employee for each additional employee.

After you have added the employees, verify that the data is correct.

You will see Employee and Dependent totals at the top of the page.

You can make manual corrections to the employee information in these fields if needed.

Click Next to continue to plan selection.

In the Plan Selection screen, select the check marks for up to three plan offerings.

Use the Search field or filters to locate specific plans.

Click Next to continue.

In the Plan Assignments screen, if there are two or more plan offerings, select a medical plan for each employee.

If there is only one plan offering, the system automatically populates the plan assignment.

Click Next.