02: Generate New Self Service Group Enrollment

Table of Contents

Overview

This document will guide you in generating a New Group Enrollment through the Broker Self Service Portal.

Audience: Brokers

Time to Complete: 20 Min

Line of Business: Small Group

Region: Enterprise/GA

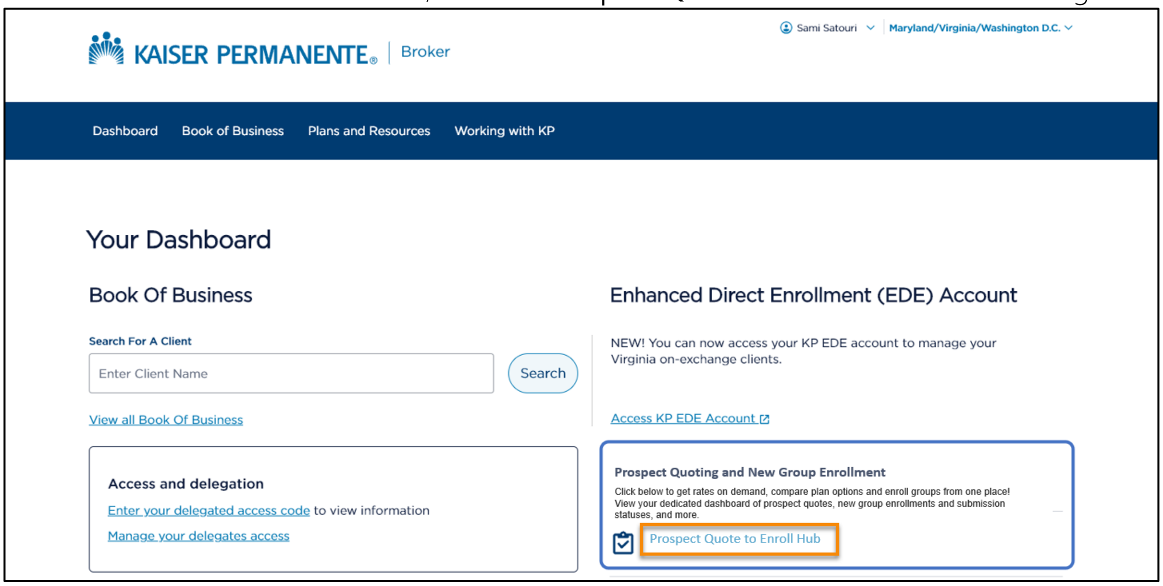
Sales Connect Version: GA Release 9.2

Access the CPQ Quoting Tool

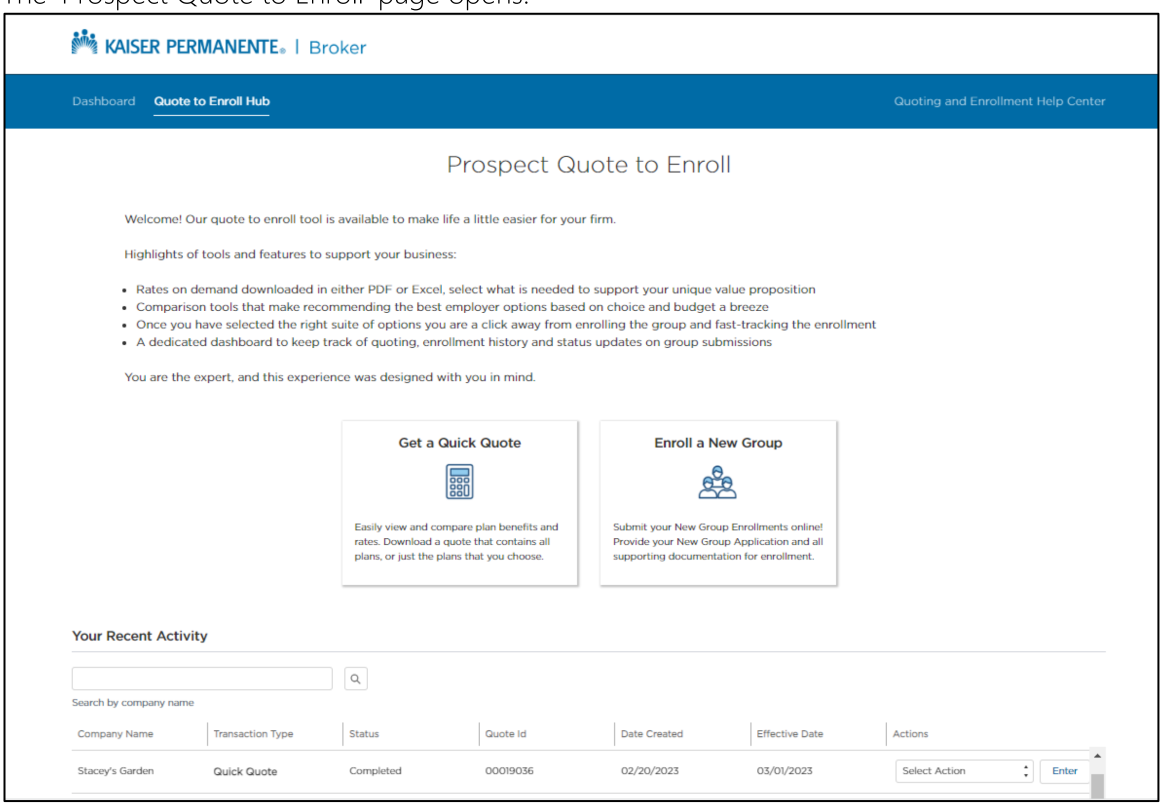
To move forward with a Buy decision and move to a New Group Enrollment go to 'Prospect Quote to Enroll'.

Open Prospect Quoting and New Group Enrollment

1. From the Broker Self Service Portal, click the **Prospect Quote to Enroll** link in the lower right corner.



2. The 'Prospect Quote to Enroll' page opens.

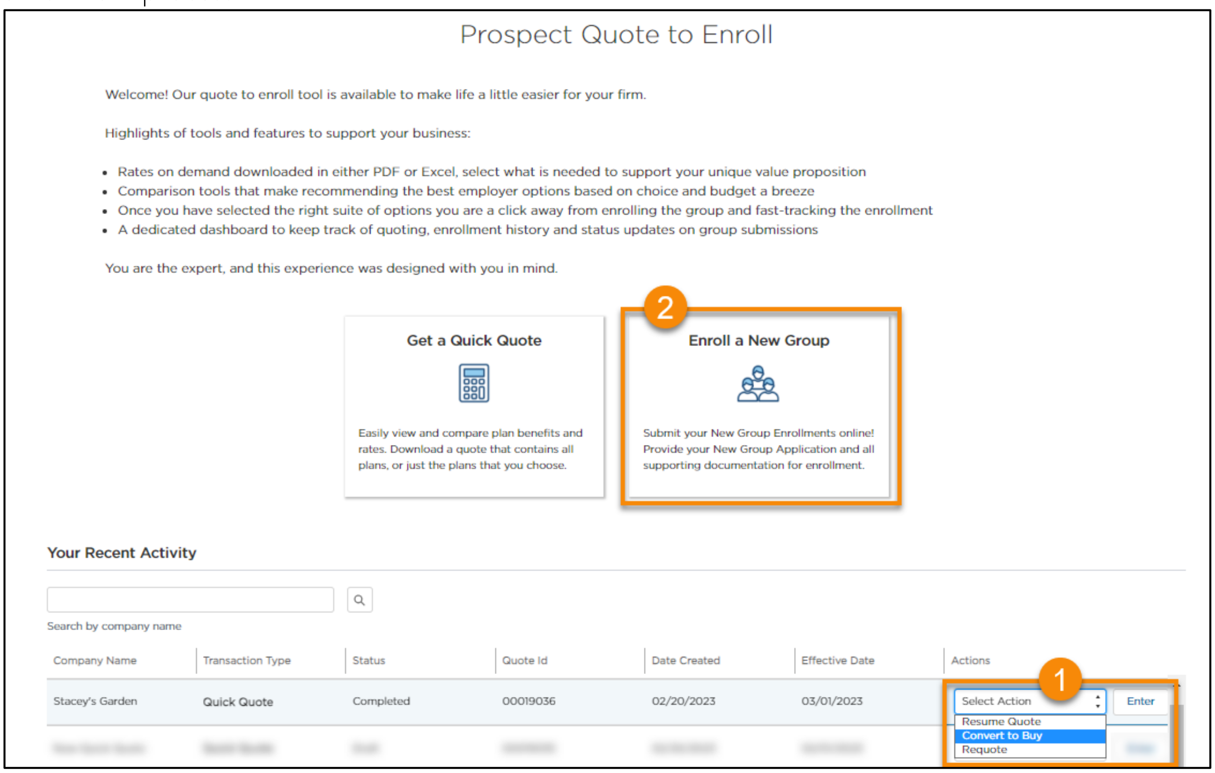


New Group Enrollment

Begin New Group Enrollment

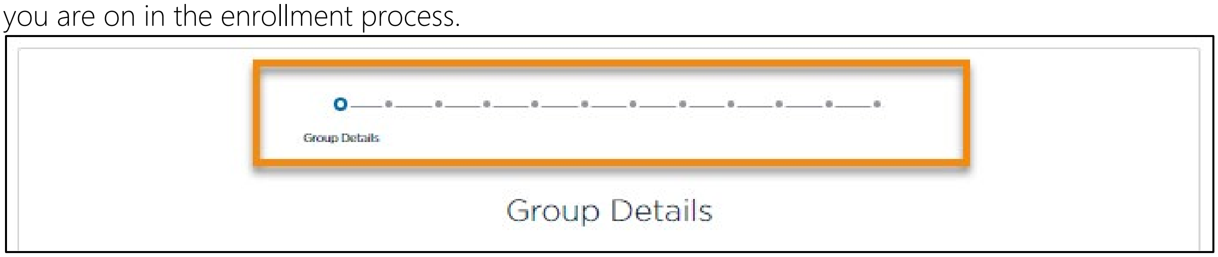
There are two ways you can begin new group enrollment:

1. If you previously completed a Quick Quote for the group, begin at 'Your Recent Activity'.
   a. Find the Quote in the 'Your Recent Activity' table.
   b. Under the Actions drop down, click **Convert to Buy.**
   c. Click **Enter**.
2. If you did not previously complete a Quick Quote for the group, click **Enroll a New Group** to begin the enrollment process.

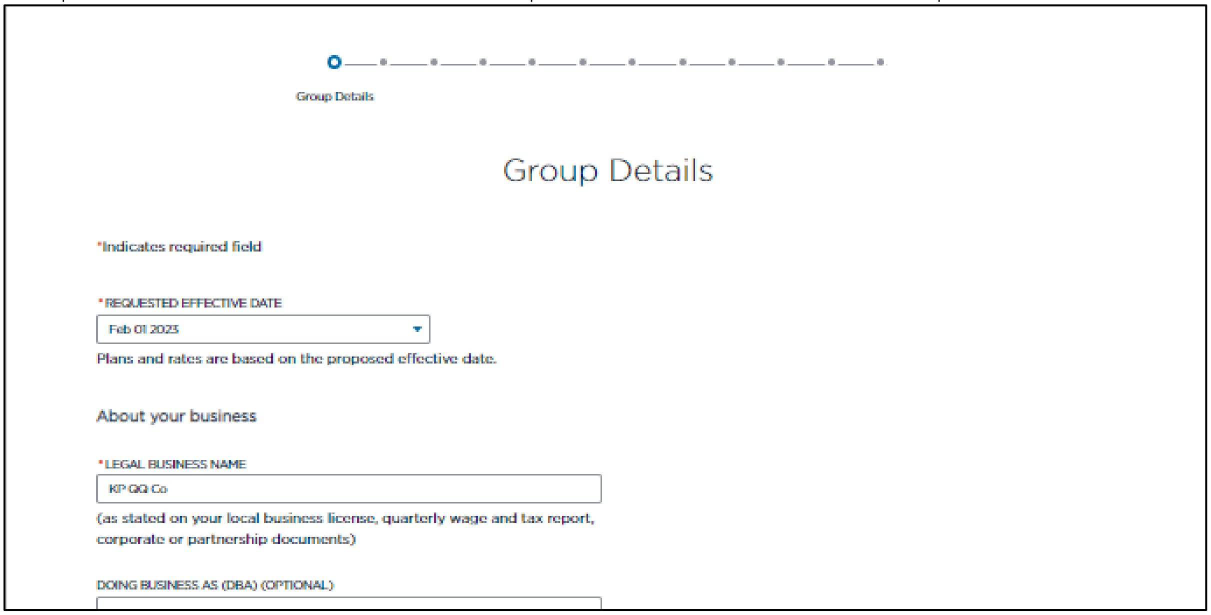


Complete the Group Details

1. When the enrollment process begins, you'll notice a graphic at the top of each page that shows which step you are on in the enrollment process.

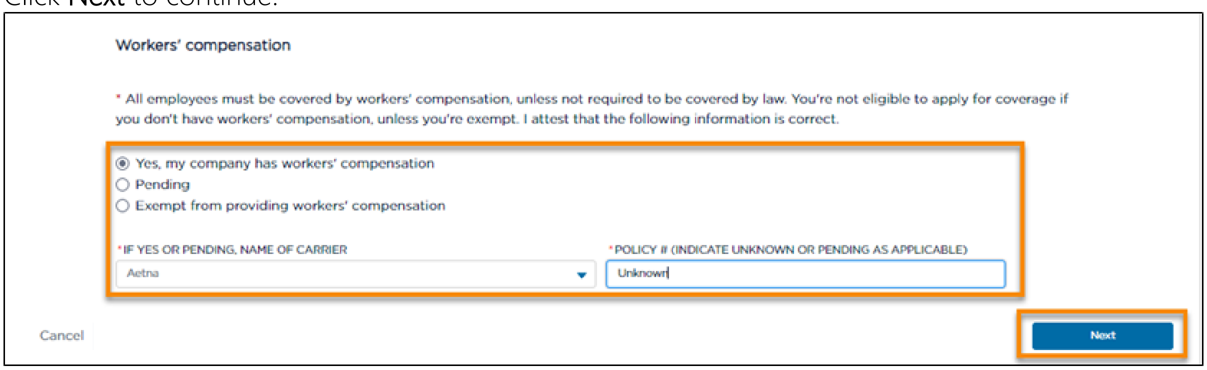


2. Complete or validate the fields in the 'Group Details' screen (* indicates a required field).



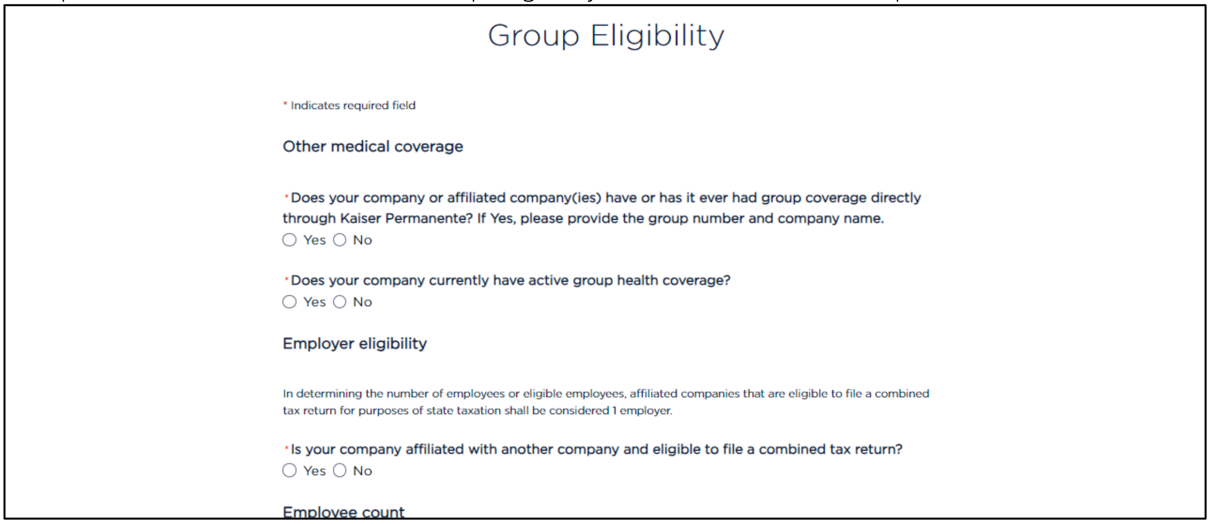
Tip: If you select 'yes, my company has worker's compensation' but don't know the policy #, you can enter 'Unknown' in the policy # field.

3. Click **Next** to continue.

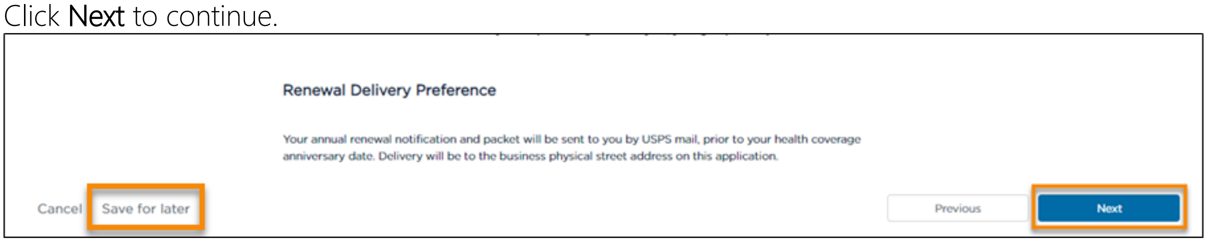


Enter Group Eligibility

1. Complete the information in the 'Group Eligibility' screen (*indicates a required field).

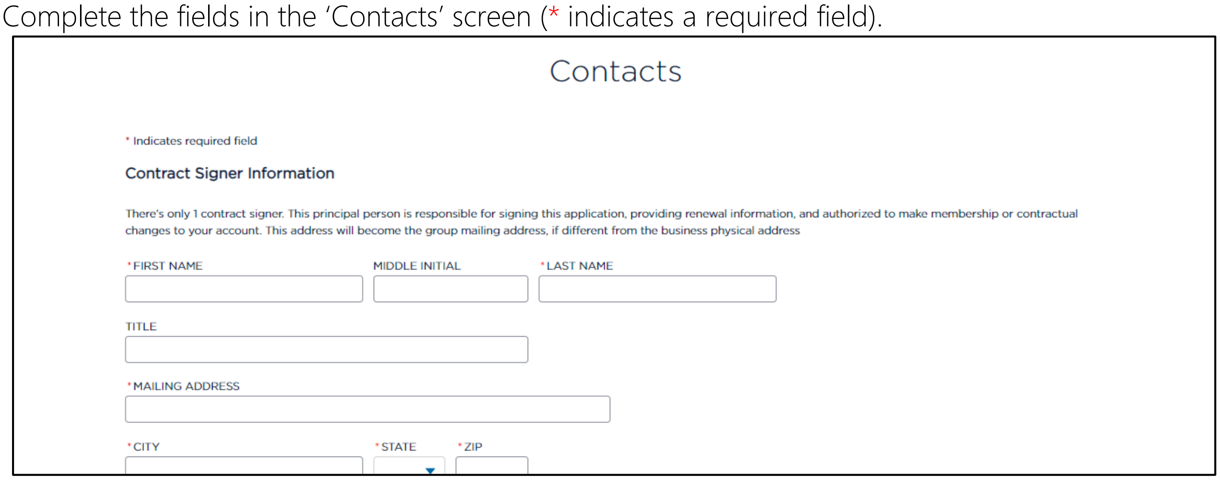


2. From this point on during the enrollment process, you may click **Save for later** if you need to step away. Refer to the section below, *Save and Edit the Enrollment* for details.
3. Click **Next** to continue.

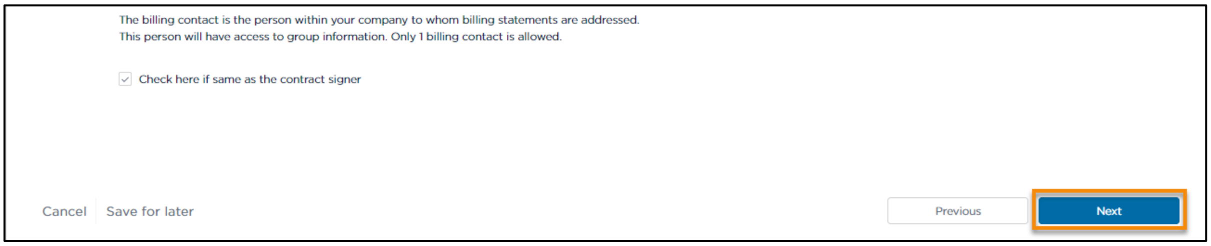


Enter Contacts Details

1. Complete the fields in the 'Contacts' screen (* indicates a required field).

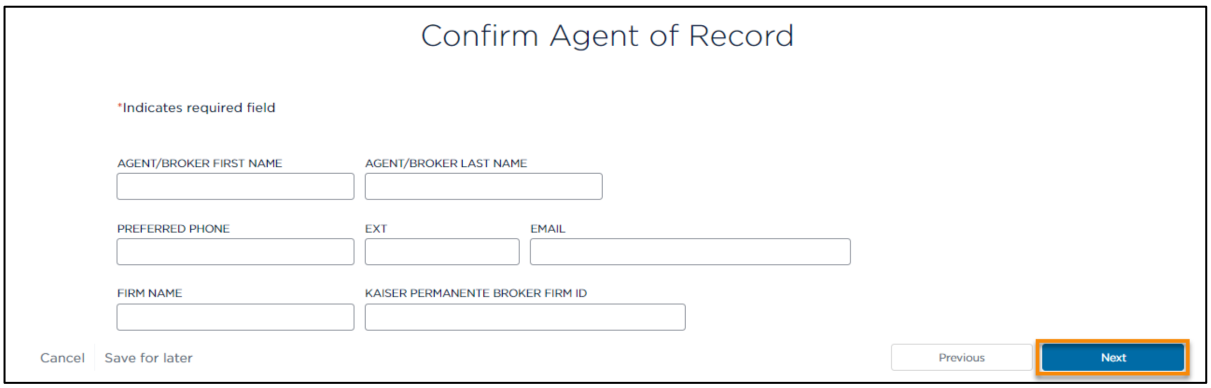


2. Click **Next**.



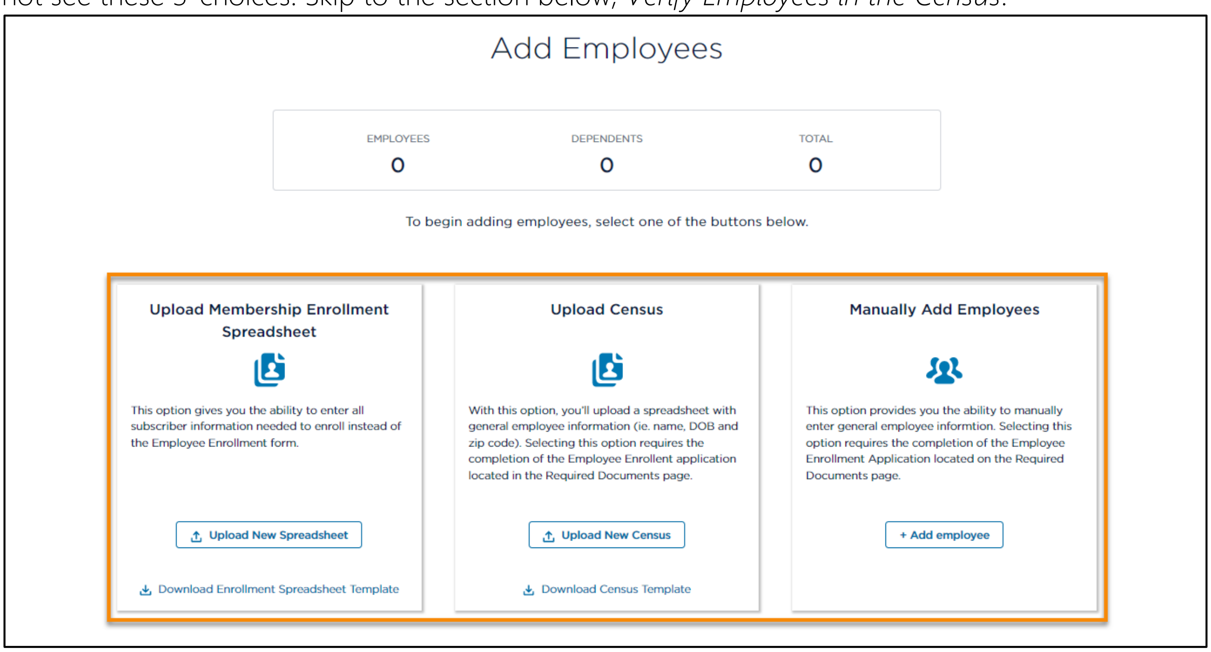
Confirm Agent of Record

1. Complete the Broker or Agent details in the 'Confirm Agent of Record' screen.
2. Click **Next.**



Add Employees

1. In the 'Add Employees' screen, there are 3 options to begin adding employees:
   Note: If you previously completed a Quick Quote, the census information will be pre-populated, and you will not see these 3-choices. Skip to the section below, *Verify Employees in the Census*.



a. *Upload Membership Enrollment Spreadsheet* –Use this option in lieu of the Employee Enrollment form.

   i. Download the Enrollment Spreadsheet Template.

   ii. Enter all subscriber information needed for enrollment and save to your computer.

   iii. Click Upload New Spreadsheet to upload the spreadsheet from your computer.

b. *Upload Census* – This option requires completion of the Employee Enrollment application.

   i. Download the Census Template.

   ii. Enter general employee information into the spreadsheet and save it to your computer.

   iii. Click Upload New Census to upload the census from your computer.

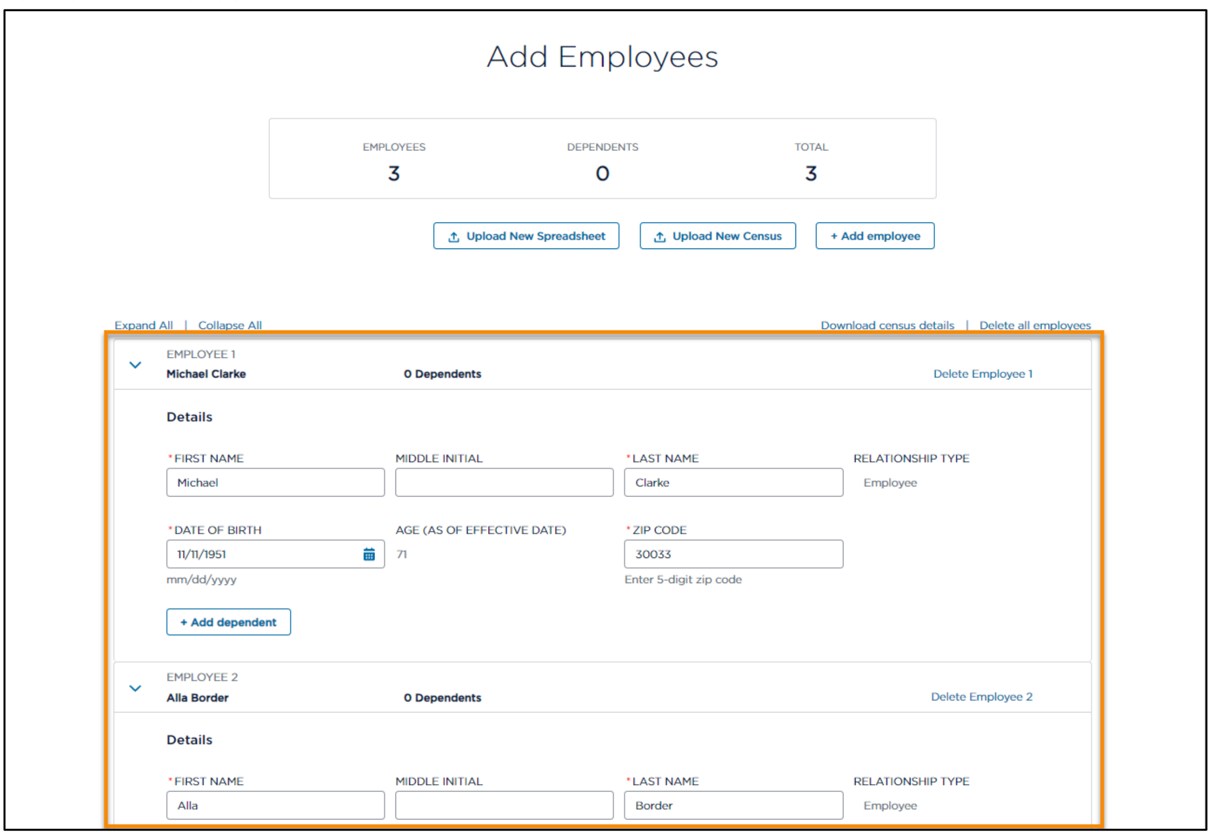
   iv. The Employee Enrollment application is located in the Required Documents screen at the end of the Enrollment process. See the *Required Documents* section below.

c. *Manually Add Employees* – Use this option to manually enter all employees. This requires completion of the Employee Enrollment form.

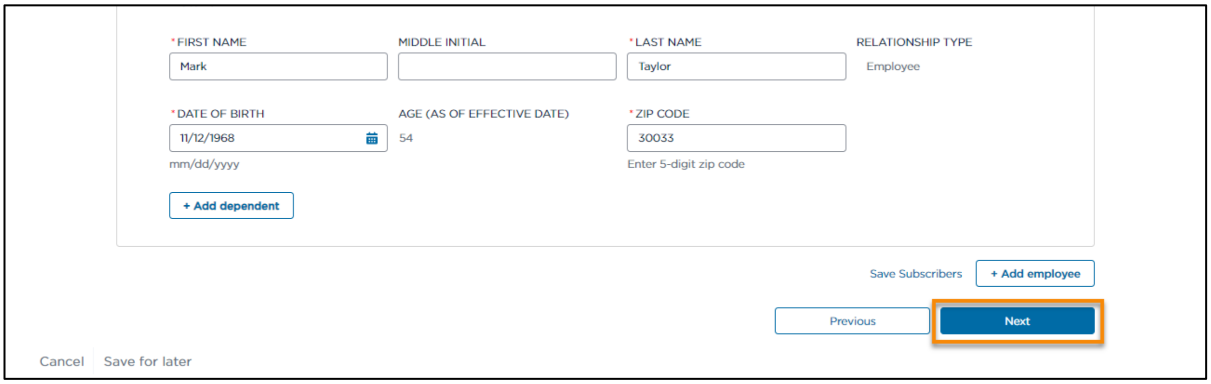
Important: At any time throughout the process, you can upload a new Census. The new Census will overwrite all employee data.

Verify Employees in the Census

1. After you have added employees, verify that the data is correct in the 'Add Employees' screen. Make manual corrections if needed.

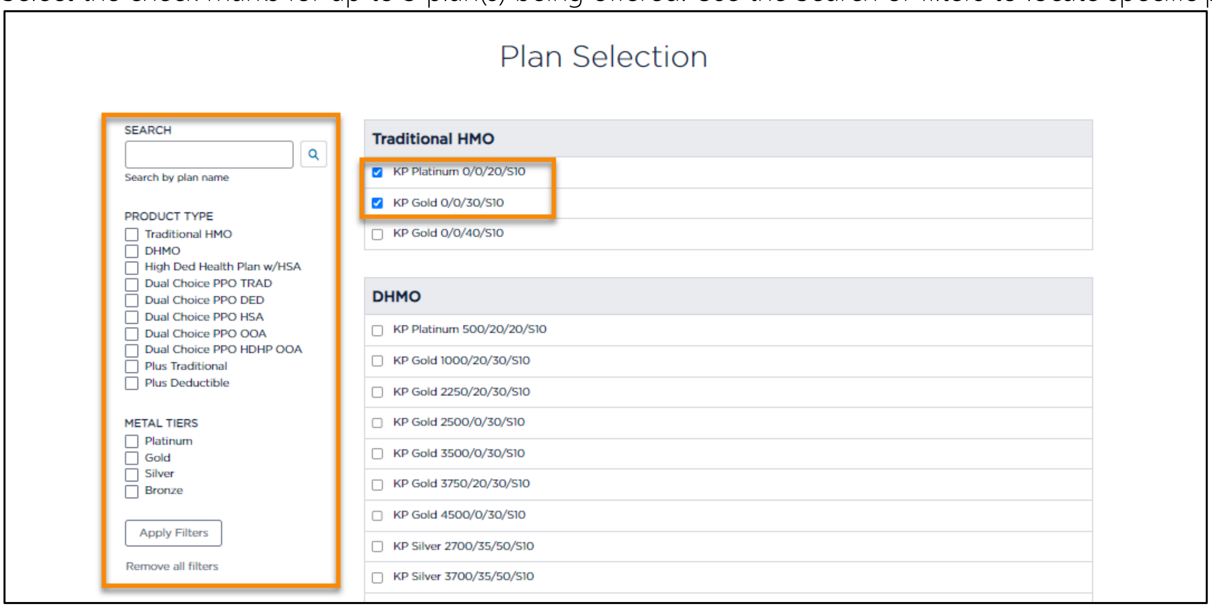


2. Click **Next** to continue.

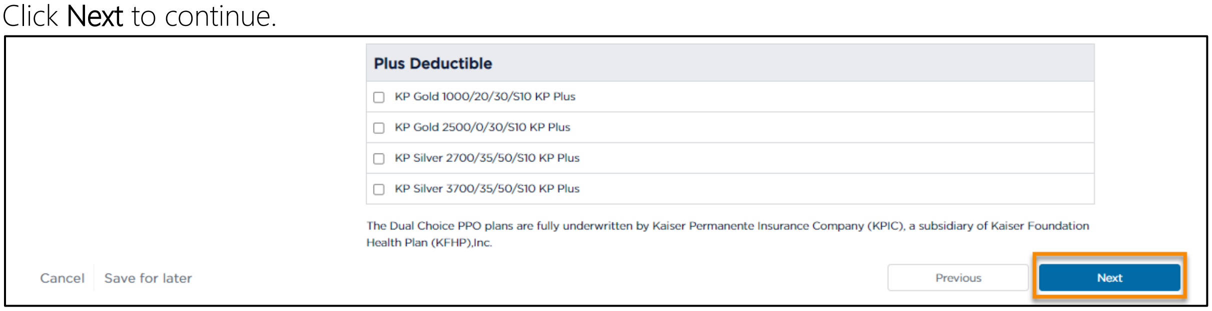


Plan Selection

1. Select the check marks for up to 3 plan(s) being offered. Use the Search or filters to locate specific plans.



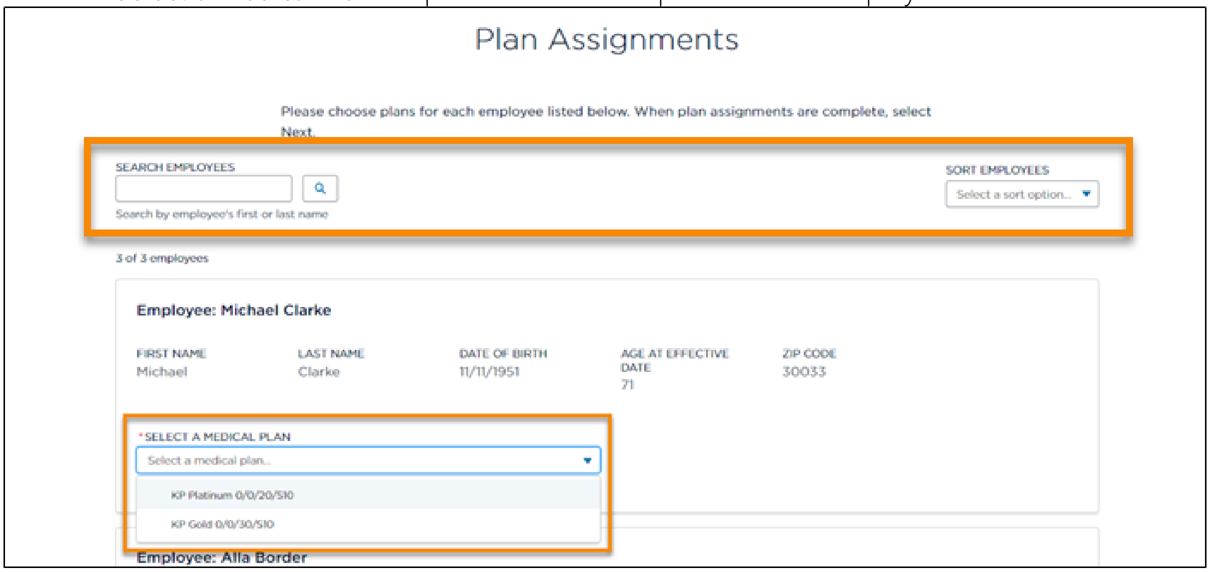
2. Click **Next** to continue.



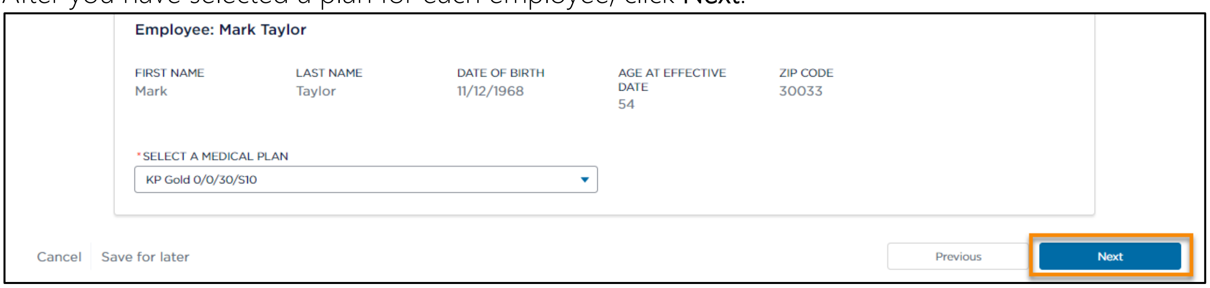
Plan Assignments

If offering two or more plans, you will need to assign a plan for each employee in the 'Plan Assignments' screen.
Note: If offering only one plan, the system automatically populates the plan assignment.

1. You can **Search** and **Sort** for employees.
2. Click the **Select a Medical Plan** drop down to select a plan for each employee.

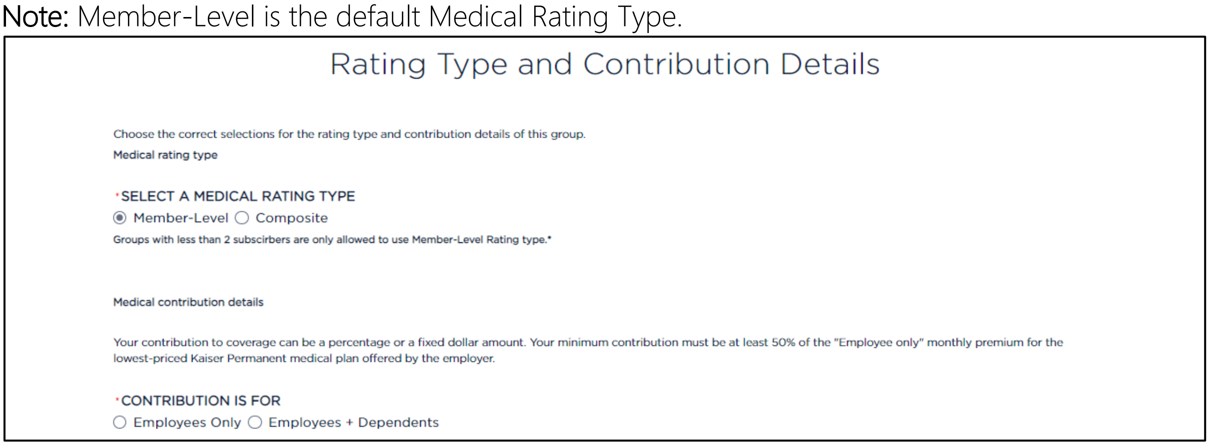


3. After you have selected a plan for each employee, click **Next**.



Rating Type and Contribution Details

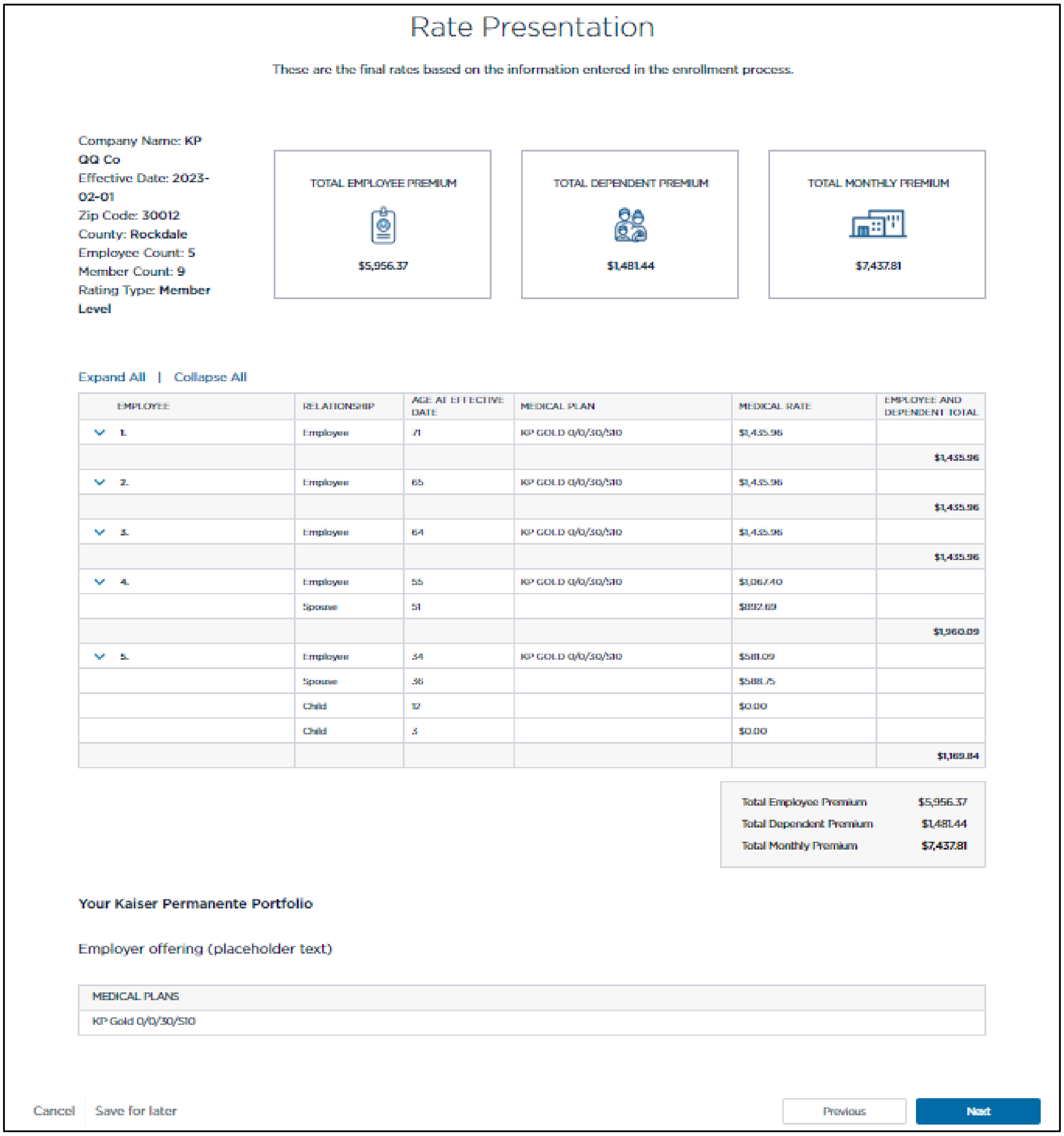
1. Complete 'Rating Type and Contribution Details' (* indicates a required field).
   Note: Member-Level is the default Medical Rating Type.



2. Click **Next**.

Rate Presentation

1. Review the final rates in the 'Rate Presentation' (* indicates a required field).
2. If the information in this screen is not correct, click Previous to go back and make edits. If everything on this screen is correct, click **Next**.



Rate Presentation

These are the final rates based on the information entered in the enrollment process.

Company Name: **KP QQ Co**
Effective Date: **2023-02-01**
Zip Code: **30012**
County: **Rockdale**
Employee Count: **5**
Member Count: **9**
Rating Type: **Member Level**

TOTAL EMPLOYEE PREMIUM	TOTAL DEPENDENT PREMIUM	TOTAL MONTHLY PREMIUM
$5,956.37	$1,481.44	$7,437.81

Expand All | Collapse All

EMPLOYEE	RELATIONSHIP	AGE AT EFFECTIVE DATE	MEDICAL PLAN	MEDICAL RATE	EMPLOYEE AND DEPENDENT TOTAL
1.	Employee	71	KP GOLD 0/0/30/510	$1,435.96	
					$1,435.96
2.	Employee	65	KP GOLD 0/0/30/510	$1,435.96	
					$1,435.96
3.	Employee	64	KP GOLD 0/0/30/510	$1,435.96	
					$1,435.96
4.	Employee	55	KP GOLD 0/0/30/510	$1,067.40	
	Spouse	51		$892.69	
					$1,960.09
5.	Employee	34	KP GOLD 0/0/30/510	$581.09	
	Spouse	36		$588.75	
	Child	12		$0.00	
	Child	3		$0.00	
					$1,169.84

Total Employee Premium	$5,956.37
Total Dependent Premium	$1,481.44
Total Monthly Premium	$7,437.81

Your Kaiser Permanente Portfolio

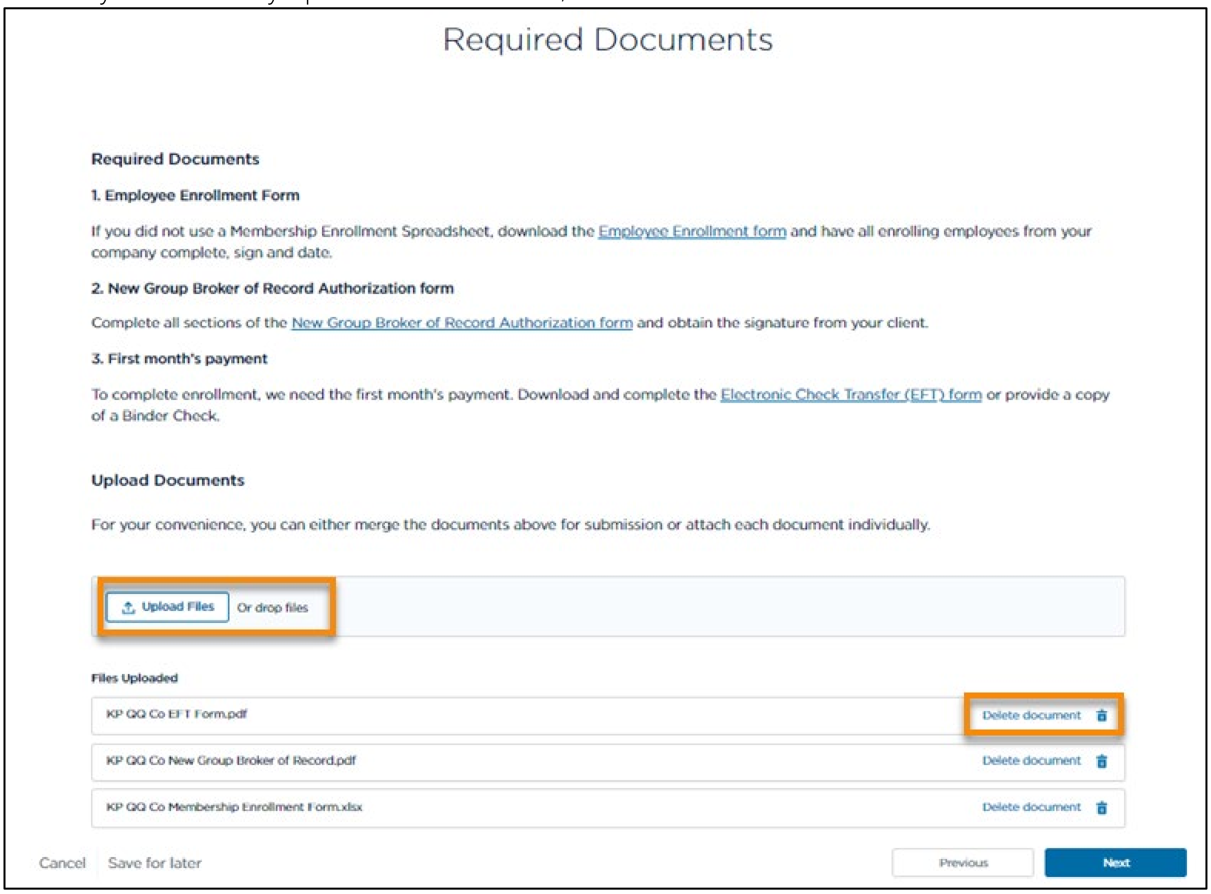
Employer offering (placeholder text)

MEDICAL PLANS
KP Gold 0/0/30/510

Cancel | Save for later | Previous | Next

Required Documents

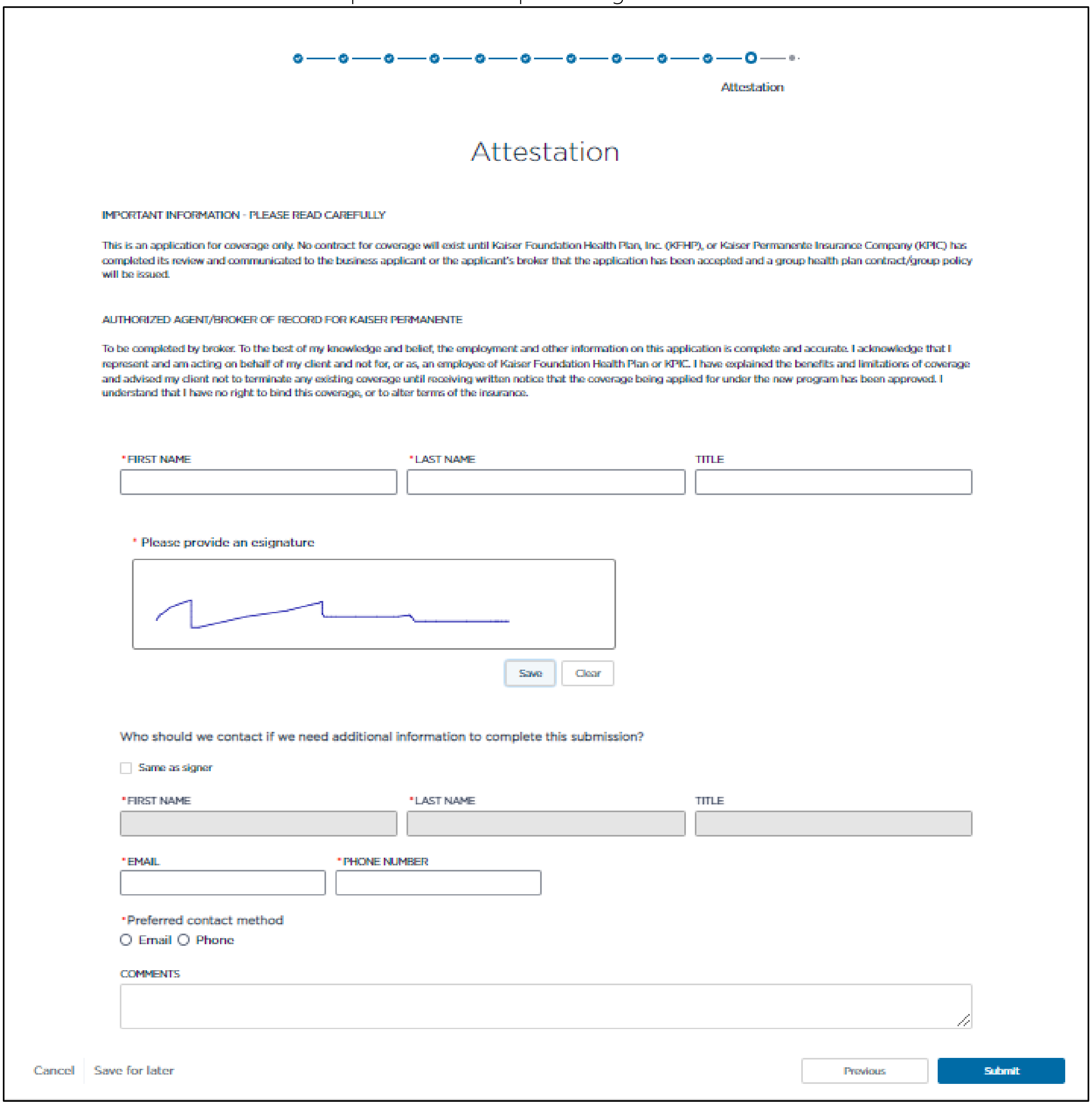
1. Review the list of Required Documents.
   Note: Because you are signing an online application on behalf of your group, download the **New Group Broker of Record Authorization** form and obtain a signature from your group.
2. When ready to upload the required documents, either click **Upload Files** or drag and drop the files to the target zone. You can upload documents individually or as a batch.
   Note: If you mistakenly uploaded a document, click **Delete document** to remove it.



3. When you have finished uploading the required documents, click **Next**.

Attestation

1. Complete the required fields in the Attestation.
   Note: Delegates can sign the attestation.
2. In the Email field, enter the address for the person who will receive the confirmation email for the submission.
3. Click **Submit** to send the New Group Enrollment for processing.



Attestation

Attestation

IMPORTANT INFORMATION - PLEASE READ CAREFULLY

This is an application for coverage only. No contract for coverage will exist until Kaiser Foundation Health Plan, Inc. (KFHP), or Kaiser Permanente Insurance Company (KPIC) has completed its review and communicated to the business applicant or the applicant's broker that the application has been accepted and a group health plan contract/group policy will be issued.

AUTHORIZED AGENT/BROKER OF RECORD FOR KAISER PERMANENTE

To be completed by broker. To the best of my knowledge and belief, the employment and other information on this application is complete and accurate. I acknowledge that I represent and am acting on behalf of my client and not for, or as, an employee of Kaiser Foundation Health Plan or KPIC. I have explained the benefits and limitations of coverage and advised my client not to terminate any existing coverage until receiving written notice that the coverage being applied for under the new program has been approved. I understand that I have no right to bind this coverage, or to alter terms of the insurance.

*FIRST NAME *LAST NAME TITLE

* Please provide an esignature

Save Clear

Who should we contact if we need additional information to complete this submission?

Same as signer

*FIRST NAME *LAST NAME TITLE

*EMAIL *PHONE NUMBER

*Preferred contact method
Email Phone

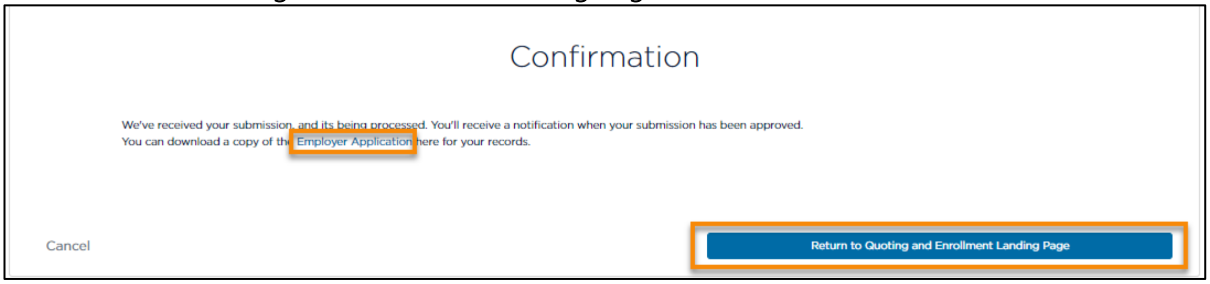
COMMENTS

Cancel Save for later Previous Submit

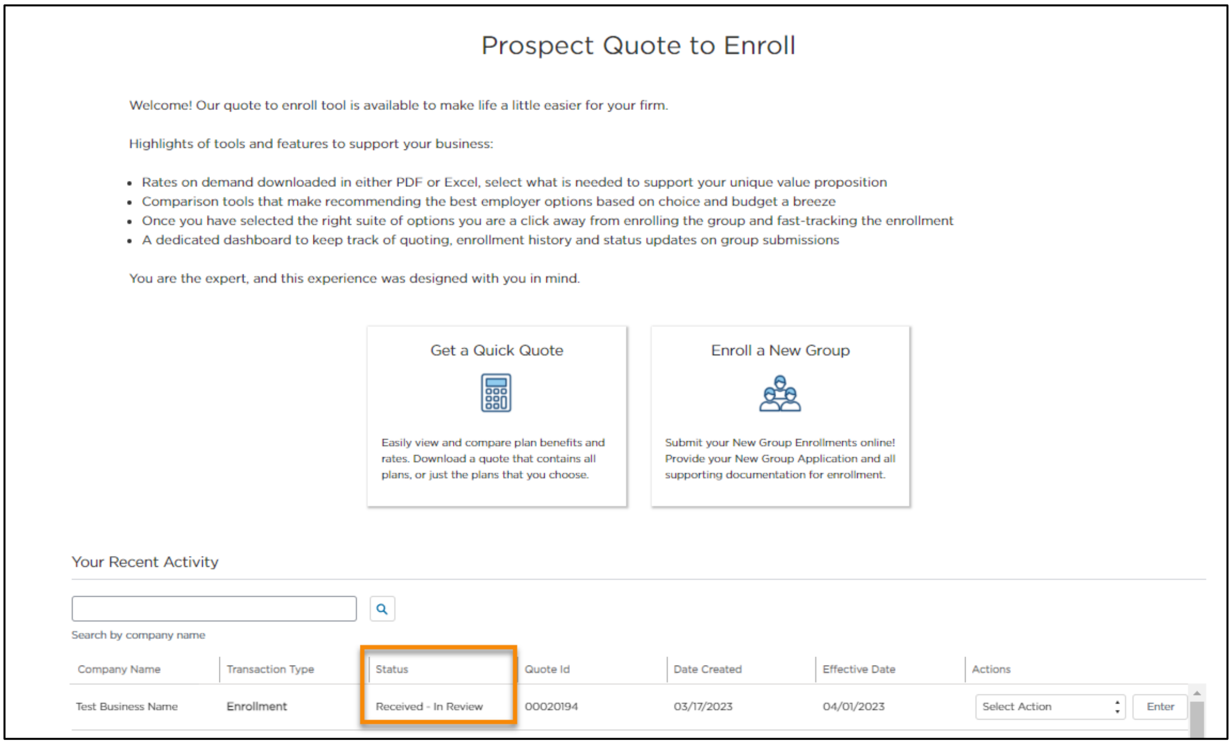
Confirmation

1. On the 'Confirmation' page, click the **Employer Application** link to download the application for your records.

2. Click **Return to Quoting and Enrollment Landing Page**.



3. From the landing page, scroll down to Your Recent Activity.
4. Review the **Status** column.

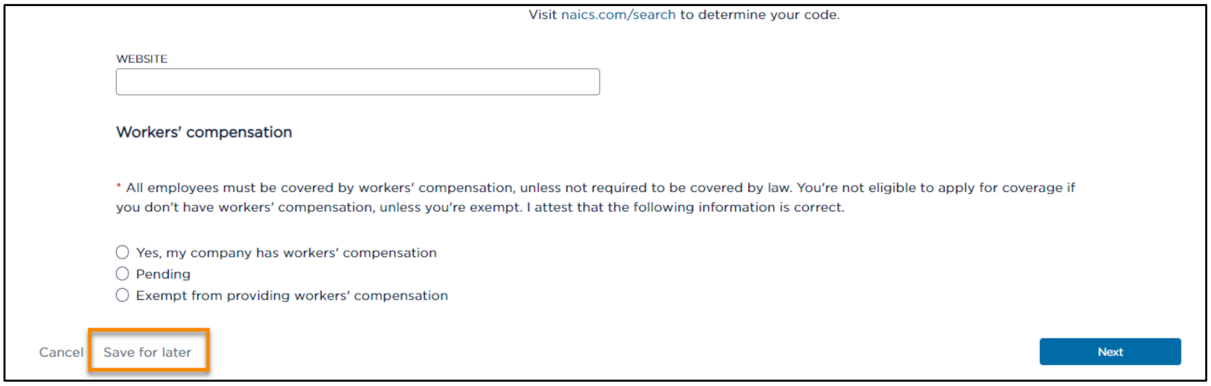


   a. After submitting the application, the status should show "Received- In Review". You will receive an email confirming that the submission was received.
   b. Once the application has been complete, the status will update to "Completed" and the Welcome Packet will be sent out.

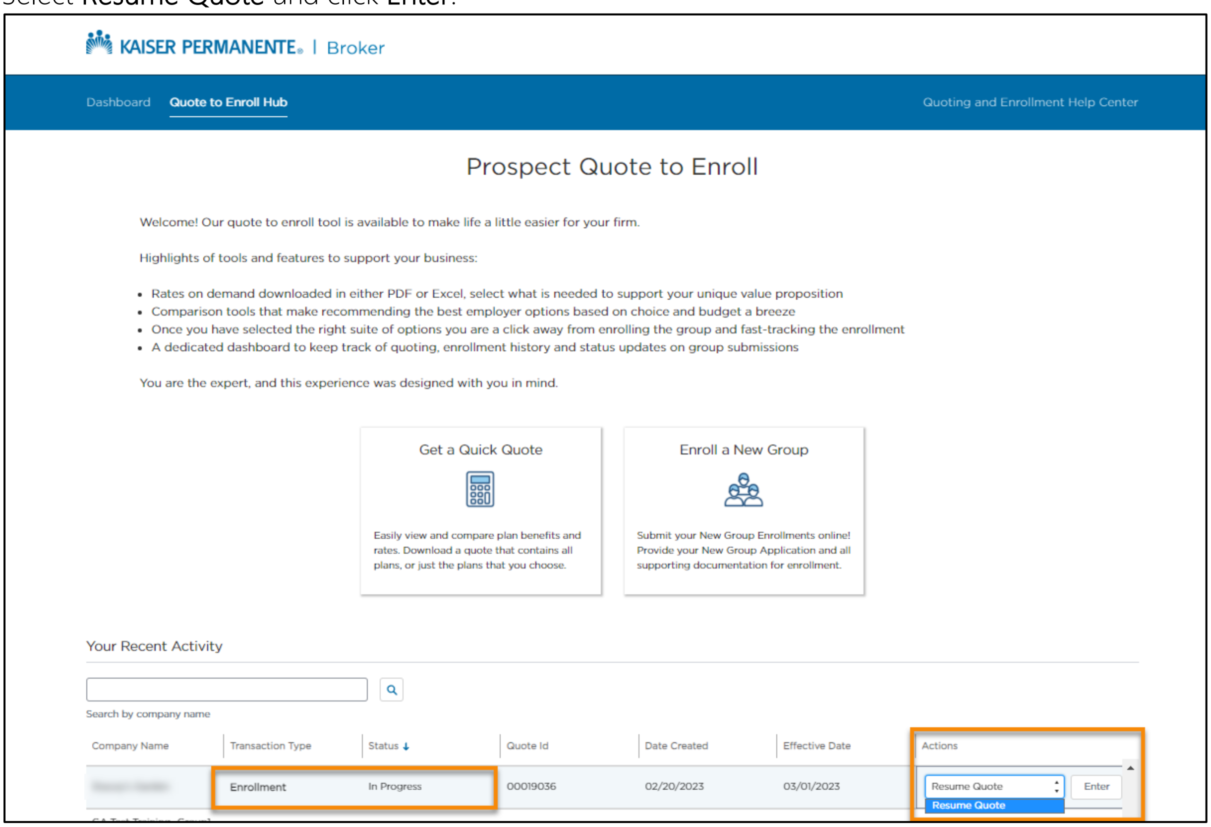
Save and Edit the Enrollment

Save your work for later

1. If you need to step away at any point during the New Group Enrollment, click **Save for later** to save your work.

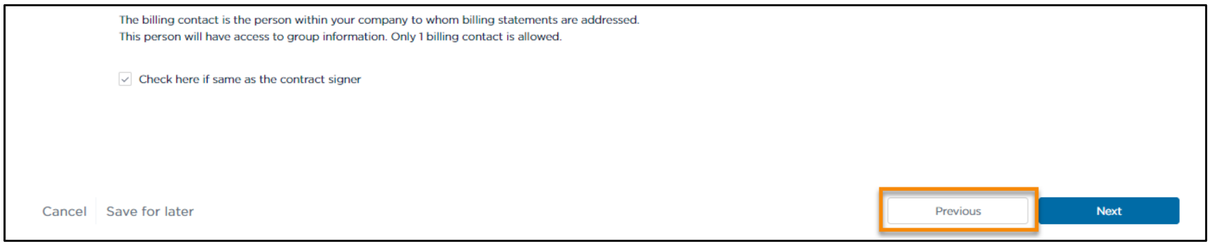


2. To return to where you left off, go to the 'Prospect Quoting and New Group Enrollment' page.
3. Look for 'Your Recent Activity'
4. Select the **Actions** drop down for the corresponding business name.
5. Select **Resume Quote** and click **Enter**.



Edit previously completed screens

1. Make changes to previous screens by clicking the **Previous** button at the bottom of the screen. Allow the previous screen to fully load. Continue this process until you get to the page where you need to make a correction.



2. To return to the most current page, click **Next** and allow the next page to load before clicking Next again.