



02: Generate New Self Service Group Enrollment

Table of Contents

Access the CPQ Quoting Tool.....	2
Open Prospect Quoting and New Group Enrollment	2
New Group Enrollment	3
Begin New Group Enrollment	3
Complete the Group Details.....	3
Enter Group Eligibility	5
Enter Contacts Details.....	5
Confirm Agent of Record	6
Add Employees.....	6
Verify Employees in the Census	7
Plan Selection.....	8
Plan Assignments.....	9
Rating Type and Contribution Details.....	9
Rate Presentation.....	10
Required Documents.....	11
Attestation.....	12
Confirmation.....	12
Save and Edit the Enrollment.....	14
Save your work for later.....	14
Edit previously completed screens	15

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

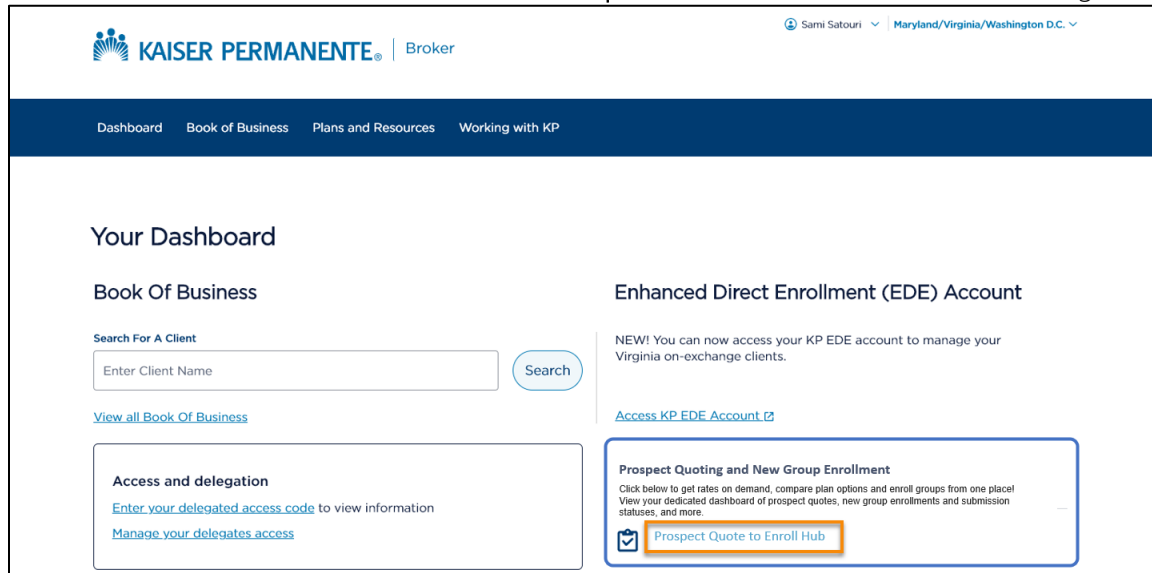
Sales Connect Version: GA Release 9.2

Access the CPQ Quoting Tool

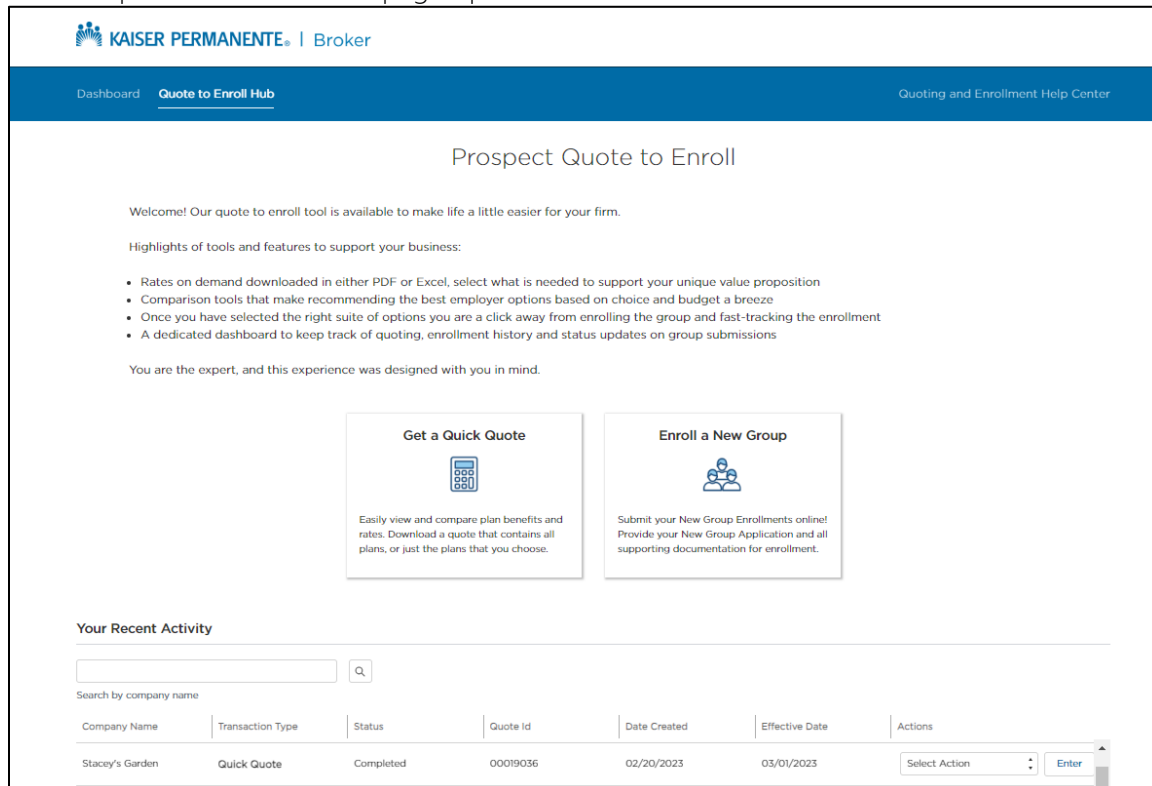
To move forward with a Buy decision and move to a New Group Enrollment go to 'Prospect Quote to Enroll'.

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.

Prospect Quote to Enroll

Welcome! Our quote to enroll tool is available to make life a little easier for your firm.

Highlights of tools and features to support your business:

- Rates on demand downloaded in either PDF or Excel, select what is needed to support your unique value proposition
- Comparison tools that make recommending the best employer options based on choice and budget a breeze
- Once you have selected the right suite of options you are a click away from enrolling the group and fast-tracking the enrollment
- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions

You are the expert, and this experience was designed with you in mind.

Get a Quick Quote

Easily view and compare plan benefits and rates. Download a quote that contains all plans, or just the plans that you choose.

Enroll a New Group

Submit your New Group Enrollments online! Provide your New Group Application and all supporting documentation for enrollment.

Your Recent Activity

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
Stacey's Garden	Quick Quote	Completed	00019036	02/20/2023	03/01/2023	<div><div>Select Action</div><div>Resume Quote</div><div>Convert to Buy</div><div>Requote</div></div> <div>Enter</div>

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.

Group Details

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

Group Details

* Indicates required field

* REQUESTED EFFECTIVE DATE
Feb 01 2023

Plans and rates are based on the proposed effective date.

About your business

* LEGAL BUSINESS NAME
KP QO Co

(as stated on your local business license, quarterly wage and tax report, corporate or partnership documents)

DOING BUSINESS AS (DBA) (OPTIONAL)

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.

Workers' compensation

* All employees must be covered by workers' compensation, unless not required to be covered by law. You're not eligible to apply for coverage if you don't have workers' compensation, unless you're exempt. I attest that the following information is correct.

☒ Yes, my company has workers' compensation
☐ Pending
☐ Exempt from providing workers' compensation


* IF YES OR PENDING, NAME OF CARRIER
Aetna

* POLICY # (INDICATE UNKNOWN OR PENDING AS APPLICABLE)
Unknown

Cancel Next

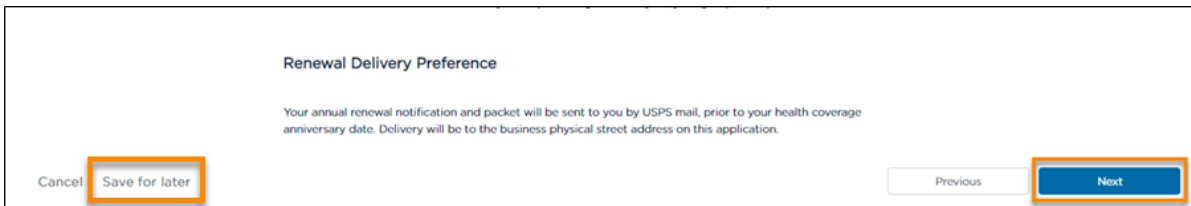
Enter Group Eligibility

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



The screenshot shows the 'Group Eligibility' screen. At the top, it says 'Group Eligibility'. Below that, a legend indicates that an asterisk (*) denotes a required field. The screen is divided into two main sections: 'Other medical coverage' and 'Employer eligibility'. Under 'Other medical coverage', there are two questions, each with 'Yes' and 'No' radio button options. The first question asks if the company or affiliated company has ever had group coverage directly through Kaiser Permanente. The second question asks if the company currently has active group health coverage. Under 'Employer eligibility', there is a paragraph explaining that for state taxation purposes, affiliated companies filing a combined tax return are considered one employer. Below this, there is a question with 'Yes' and 'No' radio button options asking if the company is affiliated with another company and eligible to file a combined tax return. At the bottom of the screen, the text 'Employee count' is visible.

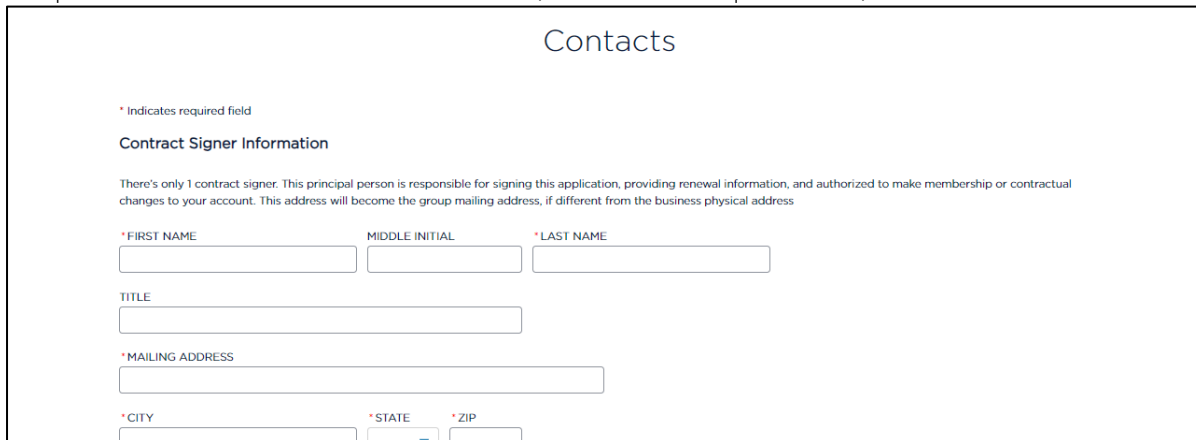
2. From this point on during the enrollment process, you may click **Save for later** if you need to step away. Refer to the section below, *Save and Edit the Enrollment* for details.
3. Click **Next** to continue.



The screenshot shows the 'Renewal Delivery Preference' screen. It contains a paragraph stating that the annual renewal notification and packet will be sent by USPS mail to the business physical street address on file. At the bottom of the screen, there are three buttons: 'Cancel', 'Save for later', and 'Next'. The 'Save for later' and 'Next' buttons are highlighted with orange boxes.

Enter Contacts Details

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



The screenshot shows the 'Contacts' screen. At the top, it says 'Contacts'. Below that, a legend indicates that an asterisk (*) denotes a required field. The screen is titled 'Contract Signer Information'. A paragraph explains that there is only one contract signer, who is responsible for signing the application, providing renewal information, and authorized to make membership or contractual changes. Below this, there are several input fields: 'FIRST NAME', 'MIDDLE INITIAL', and 'LAST NAME' (all required), 'TITLE', 'MAILING ADDRESS' (required), 'CITY', 'STATE' (with a dropdown arrow), and 'ZIP' (all required).

2. Click **Next**.

The billing contact is the person within your company to whom billing statements are addressed. This person will have access to group information. Only 1 billing contact is allowed.

☒ Check here if same as the contract signer

Cancel Save for later Previous **Next**

Confirm Agent of Record

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

Confirm Agent of Record

*Indicates required field

AGENT/BROKER FIRST NAME AGENT/BROKER LAST NAME

PREFERRED PHONE EXT EMAIL

FIRM NAME KAISER PERMANENTE BROKER FIRM ID

Cancel Save for later Previous **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*.

Add Employees

EMPLOYEES 0 DEPENDENTS 0 TOTAL 0

To begin adding employees, select one of the buttons below.

Upload Membership Enrollment Spreadsheet

This option gives you the ability to enter all subscriber information needed to enroll instead of the Employee Enrollment form.

Upload New Spreadsheet

Download Enrollment Spreadsheet Template

Upload Census

With this option, you'll upload a spreadsheet with general employee information (i.e. name, DOB and zip code). Selecting this option requires the completion of the Employee Enrollment application located in the Required Documents page.

Upload New Census

Download Census Template

Manually Add Employees

This option provides you the ability to manually enter general employee information. Selecting this option requires the completion of the Employee Enrollment Application located on the Required Documents page.

+ Add employee

- 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.

Add Employees

EMPLOYEES	DEPENDENTS	TOTAL
3	0	3

[Upload New Spreadsheet](#) [Upload New Census](#) [+ Add employee](#)

[Expand All](#) | [Collapse All](#) [Download census details](#) | [Delete all employees](#)

EMPLOYEE 1
Michael Clarke **0 Dependents** [Delete Employee 1](#)

Details

*FIRST NAME	MIDDLE INITIAL	*LAST NAME	RELATIONSHIP TYPE
<input type="text" value="Michael"/>	<input type="text"/>	<input type="text" value="Clarke"/>	Employee
*DATE OF BIRTH	AGE (AS OF EFFECTIVE DATE)	*ZIP CODE	
<input type="text" value="11/11/1951"/> <small>mm/dd/yyyy</small>	<input type="text" value="71"/>	<input type="text" value="30033"/> <small>Enter 5-digit zip code</small>	

[+ Add dependent](#)

EMPLOYEE 2
Alla Border **0 Dependents** [Delete Employee 2](#)

Details

*FIRST NAME	MIDDLE INITIAL	*LAST NAME	RELATIONSHIP TYPE
<input type="text" value="Alla"/>	<input type="text"/>	<input type="text" value="Border"/>	Employee

2. Click **Next** to continue.

* FIRST NAME: Mark, MIDDLE INITIAL: , * LAST NAME: Taylor, RELATIONSHIP TYPE: Employee

* DATE OF BIRTH: 11/12/1968, AGE (AS OF EFFECTIVE DATE): 54, * ZIP CODE: 30033

+ Add dependent

Previous, Next

Plan Selection

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

Plan Selection

SEARCH: Search by plan name

PRODUCT TYPE: Traditional HMO, DHMO, High Ded Health Plan w/HSA, Dual Choice PPO TRAD, Dual Choice PPO DED, Dual Choice PPO HSA, Dual Choice PPO OOA, Dual Choice PPO HDHP OOA, Plus Traditional, Plus Deductible

METAL TIERS: Platinum, Gold, Silver, Bronze

Apply Filters, Remove all filters

Traditional HMO

- ☒ KP Platinum 0/0/20/\$10
- ☒ KP Gold 0/0/30/\$10
- ☐ KP Gold 0/0/40/\$10

DHMO

- ☐ KP Platinum 500/20/20/\$10
- ☐ KP Gold 1000/20/30/\$10
- ☐ KP Gold 2250/20/30/\$10
- ☐ KP Gold 2500/0/30/\$10
- ☐ KP Gold 3500/0/30/\$10
- ☐ KP Gold 3750/20/30/\$10
- ☐ KP Gold 4500/0/30/\$10
- ☐ KP Silver 2700/35/50/\$10
- ☐ KP Silver 3700/35/50/\$10

Next

2. Click **Next** to continue.

Plus Deductible

- ☐ KP Gold 1000/20/30/\$10 KP Plus
- ☐ KP Gold 2500/0/30/\$10 KP Plus
- ☐ KP Silver 2700/35/50/\$10 KP Plus
- ☐ KP Silver 3700/35/50/\$10 KP Plus

The Dual Choice PPO plans are fully underwritten by Kaiser Permanente Insurance Company (KPIC), a subsidiary of Kaiser Foundation Health Plan (KFHP), Inc.

Previous, Next

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.

The screenshot shows the 'Plan Assignments' screen. At the top, it says 'Please choose plans for each employee listed below. When plan assignments are complete, select Next.' Below this is a search bar labeled 'SEARCH EMPLOYEES' with a magnifying glass icon and a dropdown menu labeled 'SORT EMPLOYEES' with the text 'Select a sort option...'. Below the search bar, it says '3 of 3 employees'. The first employee listed is 'Employee: Michael Clarke'. Below his name is a table with the following information: FIRST NAME: Michael, LAST NAME: Clarke, DATE OF BIRTH: 11/11/1951, AGE AT EFFECTIVE DATE: 71, ZIP CODE: 30033. Below the table is a dropdown menu labeled '* SELECT A MEDICAL PLAN' with the text 'Select a medical plan...'. The dropdown menu is open, showing two options: 'KP Platinum Q/0/20/510' and 'KP Gold Q/0/30/510'. Below the dropdown menu, the second employee is partially visible: 'Employee: Alla Border'.

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

The screenshot shows the 'Plan Assignments' screen for the second employee, 'Employee: Mark Taylor'. Below his name is a table with the following information: FIRST NAME: Mark, LAST NAME: Taylor, DATE OF BIRTH: 11/12/1968, AGE AT EFFECTIVE DATE: 54, ZIP CODE: 30033. Below the table is a dropdown menu labeled '* SELECT A MEDICAL PLAN' with the text 'Select a medical plan...'. The dropdown menu is open, showing one option: 'KP Gold Q/0/30/510'. At the bottom of the screen, there are three buttons: 'Cancel', 'Save for later', and 'Next'. The 'Next' button is highlighted with an orange border.

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.

The screenshot shows the 'Rating Type and Contribution Details' screen. At the top, it says 'Choose the correct selections for the rating type and contribution details of this group.' Below this is the section 'Medical rating type'. It contains a dropdown menu labeled '* SELECT A MEDICAL RATING TYPE' with two options: 'Member-Level' (selected) and 'Composite'. Below the dropdown menu, it says 'Groups with less than 2 subscribers are only allowed to use Member-Level Rating type.*'. Below this is the section 'Medical contribution details'. It contains a paragraph: 'Your contribution to coverage can be a percentage or a fixed dollar amount. Your minimum contribution must be at least 50% of the "Employee only" monthly premium for the lowest-priced Kaiser Permanent medical plan offered by the employer.' Below the paragraph is a dropdown menu labeled '* CONTRIBUTION IS FOR' with two options: 'Employees Only' and 'Employees + Dependents'.

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




\$5,956.37

TOTAL DEPENDENT PREMIUM



\$1,481.44

TOTAL MONTHLY PREMIUM



\$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 Q/Q/3Q/510	\$1,435.96	
					\$1,435.96
▼ 2.	Employee	65	KP GOLD Q/Q/3Q/510	\$1,435.96	
					\$1,435.96
▼ 3.	Employee	64	KP GOLD Q/Q/3Q/510	\$1,435.96	
					\$1,435.96
▼ 4.	Employee	55	KP GOLD Q/Q/3Q/510	\$1,067.40	
	Spouse	51		\$892.69	
					\$1,960.09
▼ 5.	Employee	54	KP GOLD Q/Q/3Q/510	\$588.09	
	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 Q/Q/3Q/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.

The screenshot shows a web interface titled "Required Documents". It lists three required documents: 1. Employee Enrollment Form, 2. New Group Broker of Record Authorization form, and 3. First month's payment. Below this is an "Upload Documents" section with a text box that says "For your convenience, you can either merge the documents above for submission or attach each document individually." There is a large light blue box with an "Upload Files" button and the text "Or drop files". Below this is a "Files Uploaded" section with a table listing three uploaded files: "KP QG Co EFT Form.pdf", "KP QG Co New Group Broker of Record.pdf", and "KP QG Co Membership Enrollment Form.xlsx". Each file has a "Delete document" button with a trash icon. At the bottom, there are "Cancel", "Save for later", "Previous", and "Next" buttons. The "Next" button is highlighted in blue.

Required Documents

Required Documents

1. Employee Enrollment Form

If you did not use a Membership Enrollment Spreadsheet, download the [Employee Enrollment form](#) and have all enrolling employees from your company complete, sign and date.

2. New Group Broker of Record Authorization form

Complete all sections of the [New Group Broker of Record Authorization form](#) and obtain the signature from your client.

3. First month's payment

To complete enrollment, we need the first month's payment. Download and complete the [Electronic Check Transfer \(EFT\) form](#) or provide a copy of a Binder Check.

Upload Documents

For your convenience, you can either merge the documents above for submission or attach each document individually.

[Upload Files](#) Or drop files

Files Uploaded

KP QG Co EFT Form.pdf	Delete document
KP QG Co New Group Broker of Record.pdf	Delete document
KP QG Co Membership Enrollment Form.xlsx	Delete document

Cancel Save for later Previous **Next**

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.

The screenshot shows the 'Attestation' form within a web application. At the top, a progress bar indicates the current step. The form title 'Attestation' is centered. Below it, a section titled 'IMPORTANT INFORMATION - PLEASE READ CAREFULLY' contains a disclaimer. The next section, 'AUTHORIZED AGENT/BROKER OF RECORD FOR KAISER PERMANENTE', includes a statement to be completed by the broker. The form then has input fields for the broker's first name, last name, and title. A signature field with a sample signature and 'Save'/'Clear' buttons follows. Below this, a question asks who to contact for additional information, with a 'Same as signer' checkbox. Another set of input fields for first name, last name, title, email, and phone number is provided. A 'Preferred contact method' section has radio buttons for 'Email' and 'Phone'. A large 'COMMENTS' text area is at the bottom. Navigation buttons at the bottom include 'Cancel', 'Save for later', 'Previous', and a blue 'Submit' button.

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

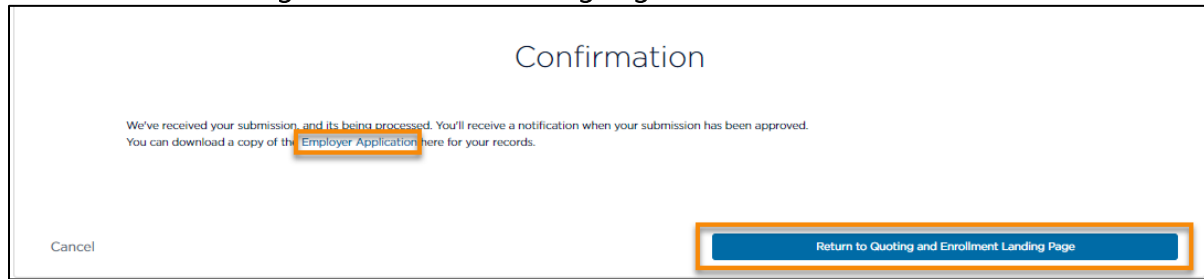
COMMENTS

Cancel Save for later Previous Submit

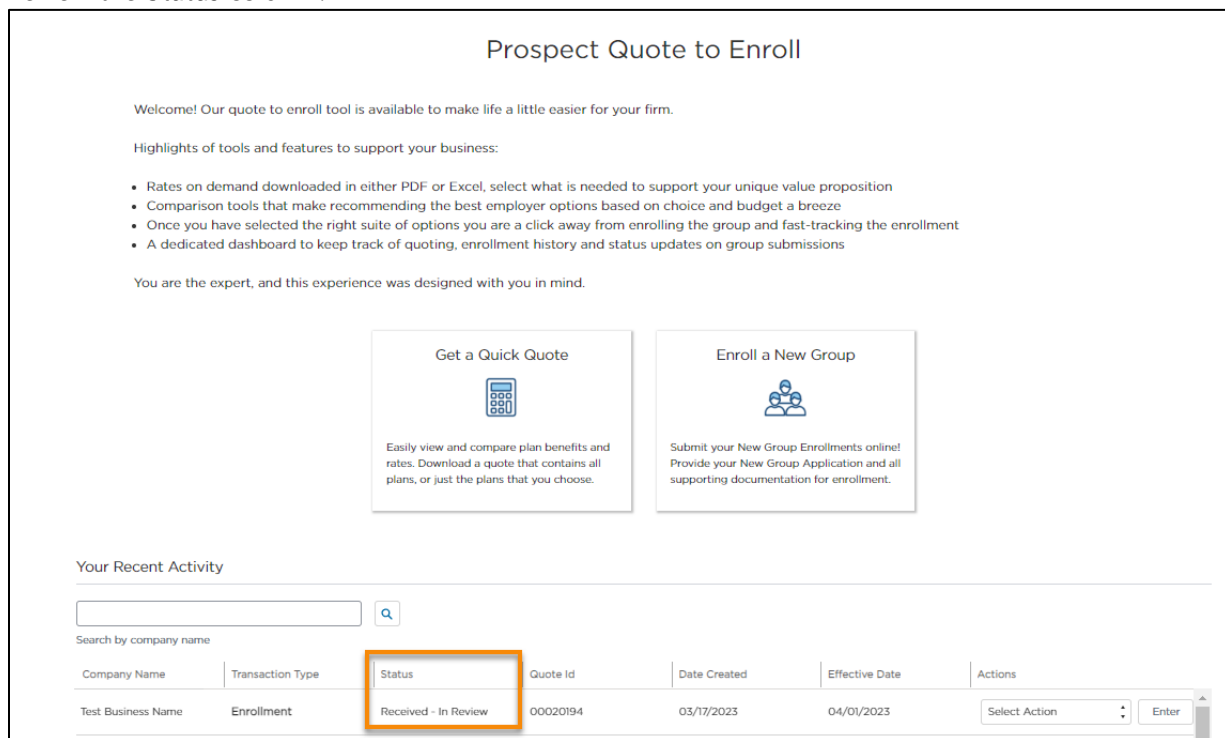
Confirmation

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.

Visit naics.com/search to determine your code.

WEBSITE

Workers' compensation

* All employees must be covered by workers' compensation, unless not required to be covered by law. You're not eligible to apply for coverage if you don't have workers' compensation, unless you're exempt. I attest that the following information is correct.

☐ Yes, my company has workers' compensation
☐ Pending
☐ Exempt from providing workers' compensation

Cancel **Save for later** Next

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**.

KAISER PERMANENTE | Broker

Dashboard **Quote to Enroll Hub** Quoting and Enrollment Help Center

Prospect Quote to Enroll


Welcome! Our quote to enroll tool is available to make life a little easier for your firm.

Highlights of tools and features to support your business:

- Rates on demand downloaded in either PDF or Excel, select what is needed to support your unique value proposition
- Comparison tools that make recommending the best employer options based on choice and budget a breeze
- Once you have selected the right suite of options you are a click away from enrolling the group and fast-tracking the enrollment
- A dedicated dashboard to keep track of quoting, enrollment history and status updates on group submissions


You are the expert, and this experience was designed with you in mind.

Get a Quick Quote



Easily view and compare plan benefits and rates. Download a quote that contains all plans, or just the plans that you choose.

Enroll a New Group



Submit your New Group Enrollments online! Provide your New Group Application and all supporting documentation for enrollment.

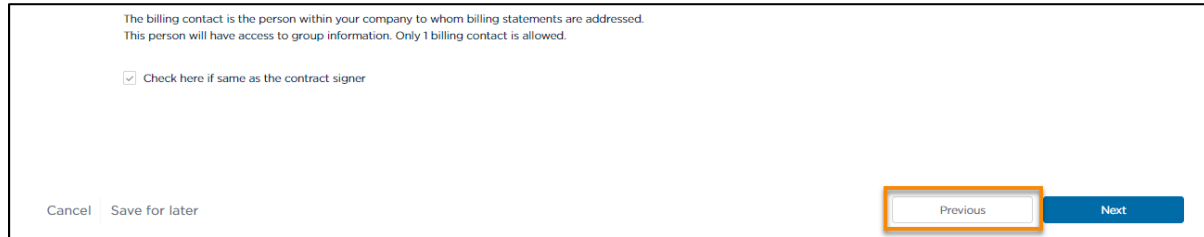
Your Recent Activity

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
ABC COMPANY	Enrollment	In Progress	00019036	02/20/2023	03/01/2023	<div>Resume Quote Resume Quote</div> <input type="button" value="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.



The billing contact is the person within your company to whom billing statements are addressed.
This person will have access to group information. Only 1 billing contact is allowed.

☒ Check here if same as the contract signer

Cancel Save for later

Previous Next

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