01: Generate a New Self Service Quick Quote (Broker)

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Overview

This document describes the steps for generating a 'Quick Quote' using the 'Prospect Quote to Enroll' workflow. The Quick Quote process will also be available to KP Brokers through the broker portal, account.kp.org.

Audience: Brokers

Time to Complete: 20 Min

Line of Business: Small Group

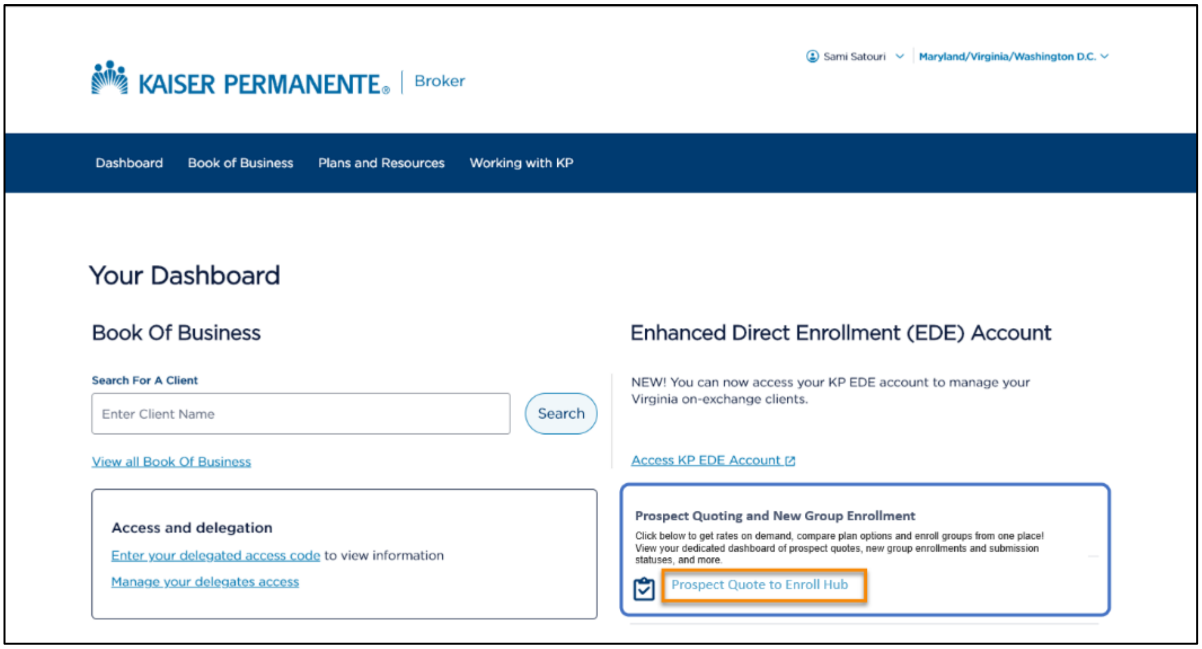
Region: Enterprise/GA

Sales Connect Version: GA Release 11.0/11.1

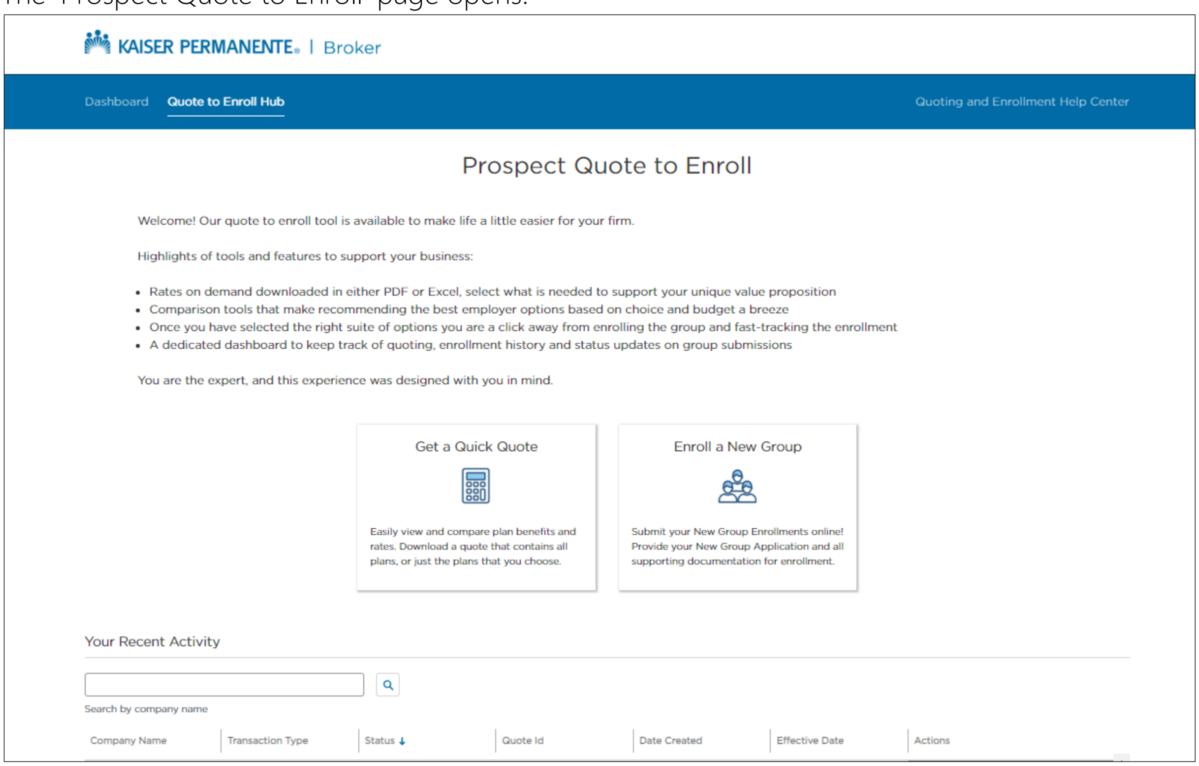
Open the Quoting Tool

Open 'Prospect Quote to Enroll'

1. Login to account.kp.org.
2. From the Broker Self Service Portal, click **Prospect Quoting to Enroll Hub** link in the lower right corner to open Sales Connect.



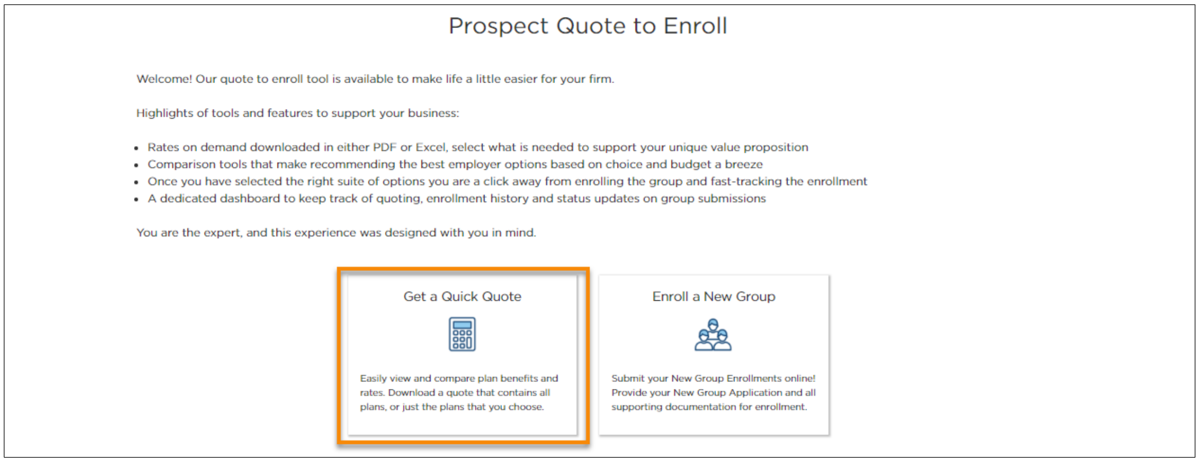
3. The 'Prospect Quote to Enroll' page opens.



Start a Quick Quote and Add Group Details

Start a Quick Quote

1. Click **Get a Quick Quote.**

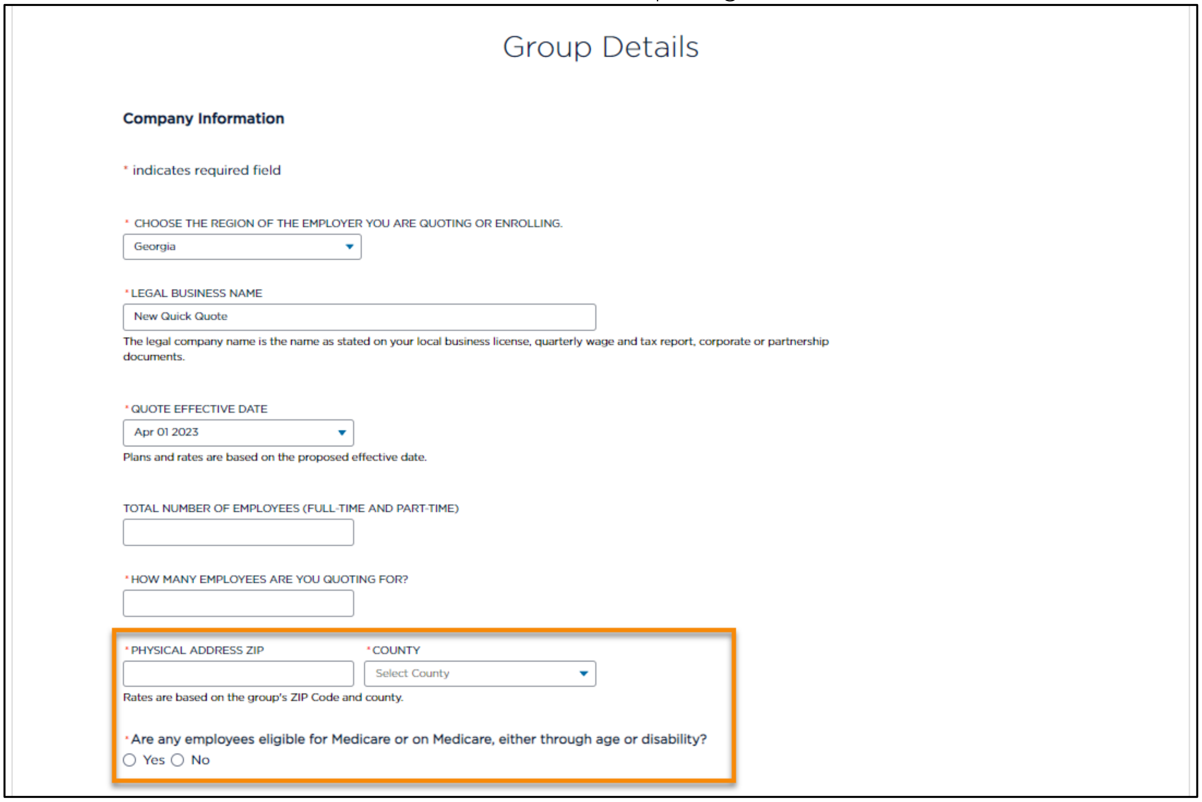


Add Group Details

1. Complete all required fields(*) on the 'Group Details' screen.
   Note: The Physical Address Zip field* and Medicare field** are hard stops.

   **Physical Address Zip:* Enter a zip code that corresponds with a service area that matches the region of your log in. Rates are based on the group's zip code and county.

***Medicare:* Must select "no" to continue with online quoting.


Group Details

Company Information

* indicates required field

* CHOOSE THE REGION OF THE EMPLOYER YOU ARE QUOTING OR ENROLLING.

Georgia

* LEGAL BUSINESS NAME

New Quick Quote

The legal company name is the name as stated on your local business license, quarterly wage and tax report, corporate or partnership documents.

* QUOTE EFFECTIVE DATE

Apr 01 2023

Plans and rates are based on the proposed effective date.

TOTAL NUMBER OF EMPLOYEES (FULL-TIME AND PART-TIME)

* HOW MANY EMPLOYEES ARE YOU QUOTING FOR?

* PHYSICAL ADDRESS ZIP

* COUNTY

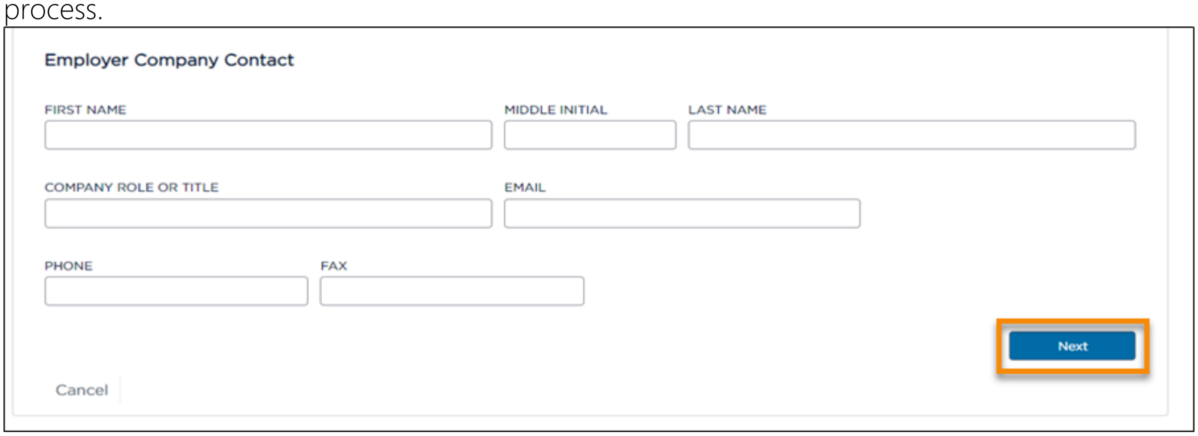
Select County

Rates are based on the group's ZIP Code and county.

* Are any employees eligible for Medicare or on Medicare, either through age or disability?

Yes No

2. Next, complete the 'Employer Company Contact' information. This information is not required but will be used by the quoting tool to create the 'Contacts' record.
3. Click **Next** to proceed to the 'Add Employees' screen, or **Cancel** to inactivate the Quick Quote and end the process.


Employer Company Contact

FIRST NAME

MIDDLE INITIAL

LAST NAME

COMPANY ROLE OR TITLE

EMAIL

PHONE

FAX

Next

Cancel

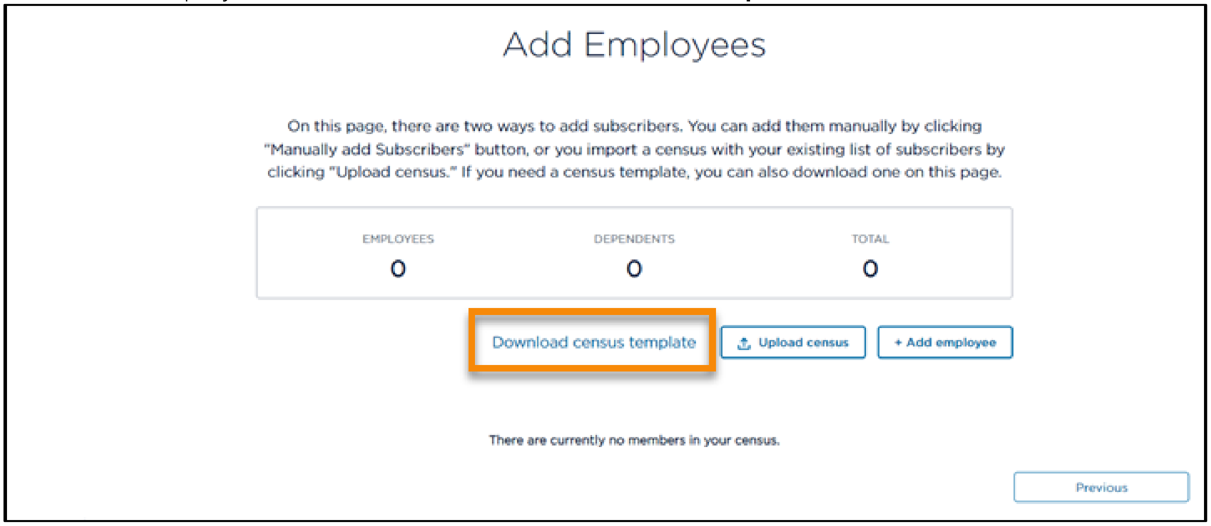
Add Census Information for each Employee

There are two preferred methods for entering census information for each employee- upload via the census template, or manual entry. These two methods help reduce the number of errors.

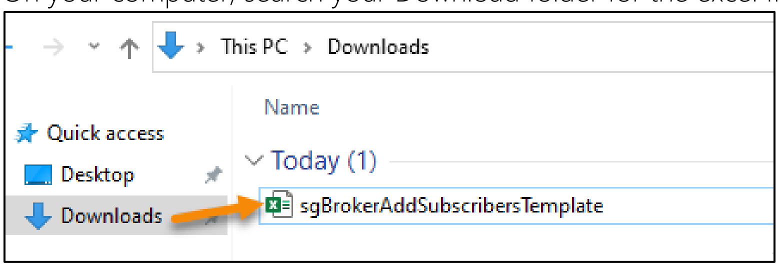
Upload employees using a Census template

The columns and tabs in the census template are arranged and formatted to map directly to the data fields in the quoting tool.

1. In the 'Add Employees', screen, click **Download census template**.



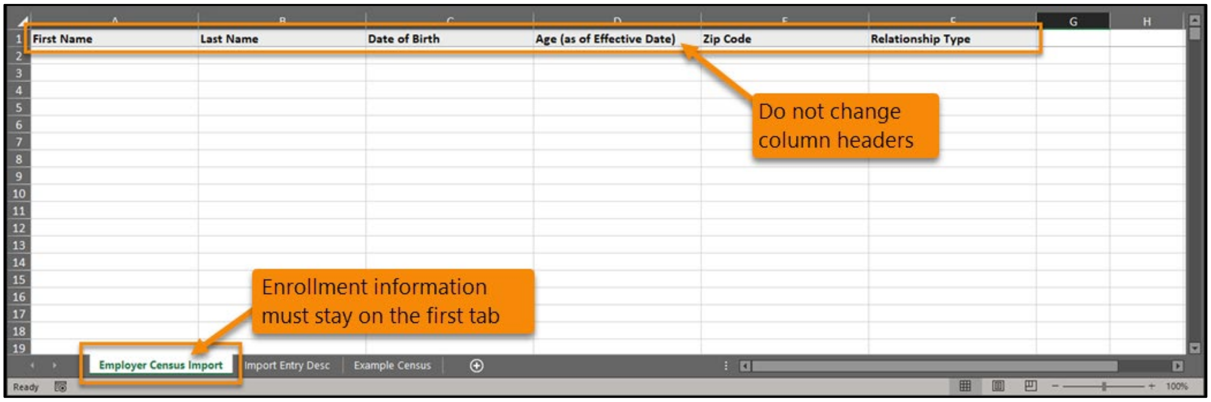
2. On your computer, search your Download folder for the excel file **sgBrokerAddSubscribersTemplate.**



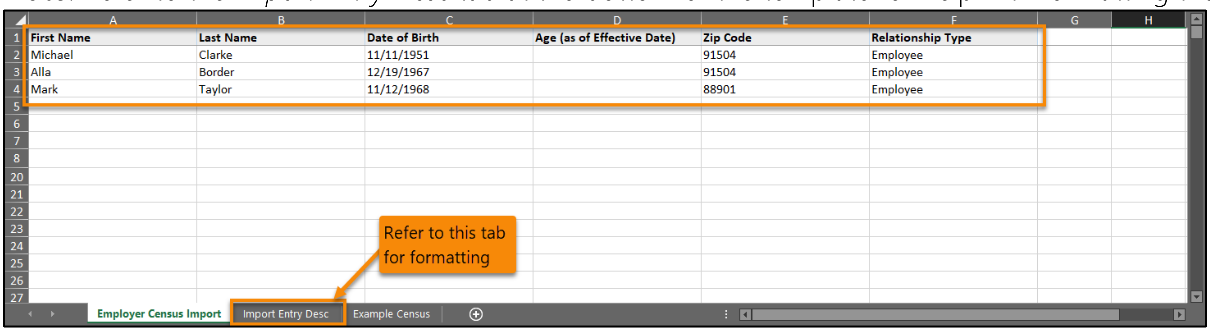
3. Open the template in Excel and review the column headers.

Important:

- Do not change column headers in the census template, as they will map directly to the required fields in the quoting tool when the completed spreadsheet is uploaded.
- Enrollment information must always reside on the first tab, *Employer Census Import*. Do not move this tab.

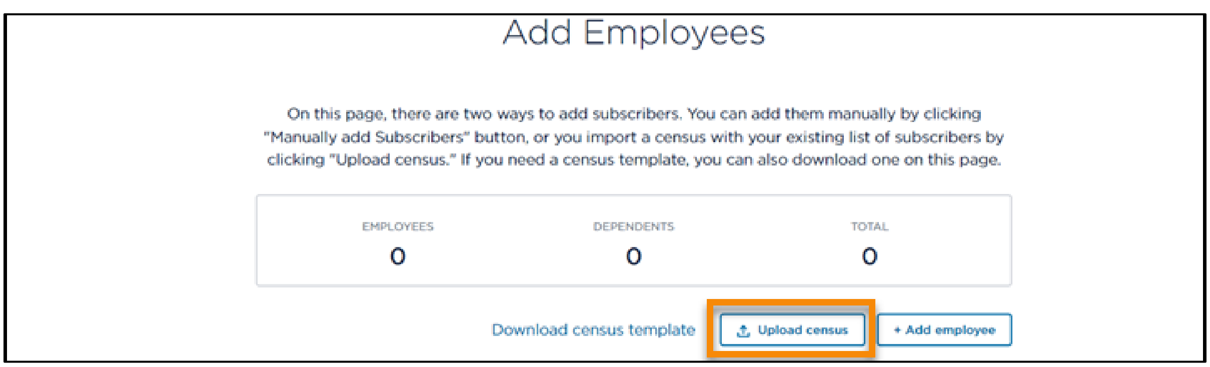


4. Enter employee information to the template (First Name, Last Name, etc).
Note: Refer to the *Import Entry Desc* tab at the bottom of the template for help with formatting the data.



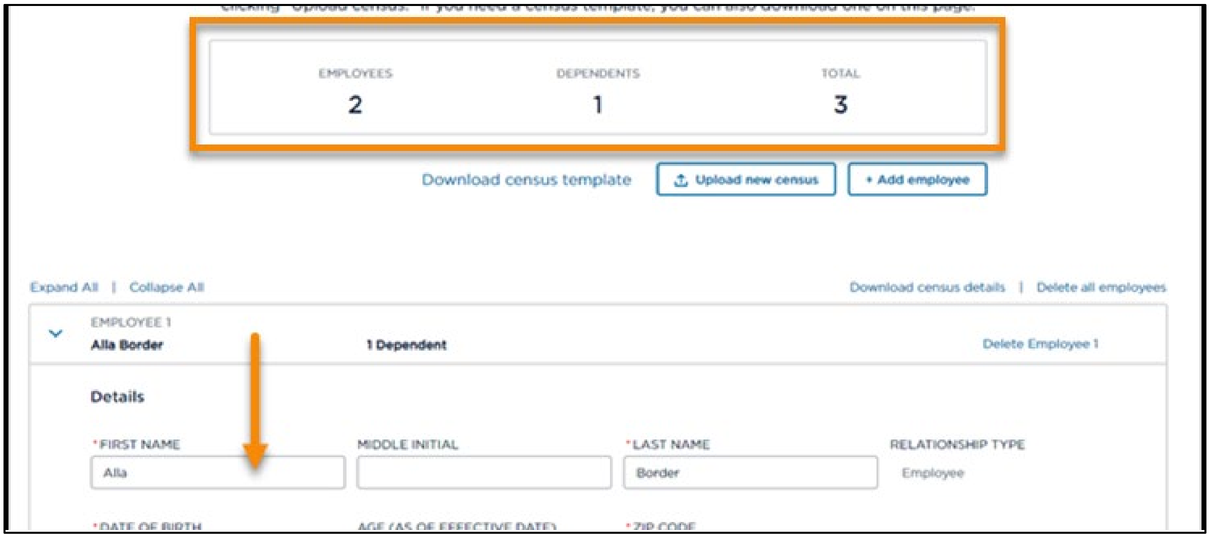
5. Save the spreadsheet in a designated folder/location on your PC.
6. Return to the 'Add Employees' page, and click **Upload Census**.
7. Upload the census template from your computer.

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

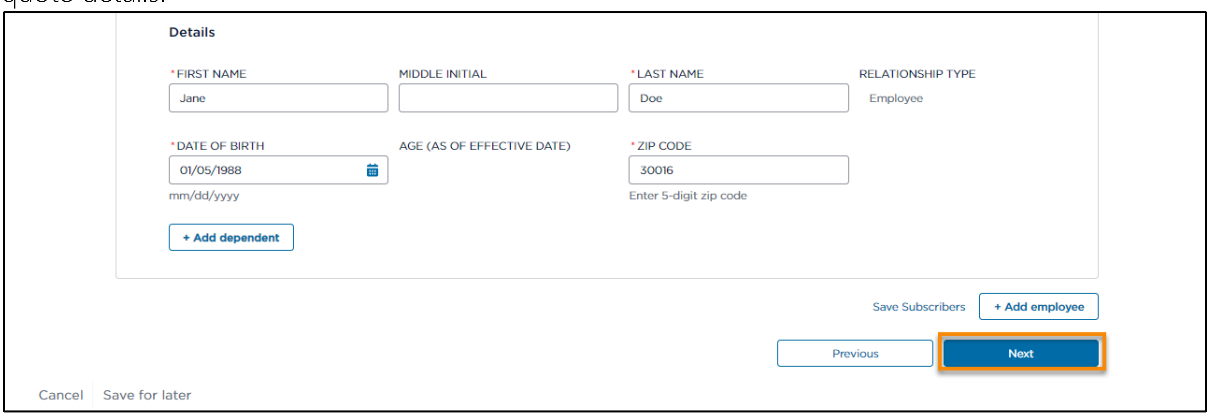


8. Verify that the totals for Employees, Dependents and Total, match your spreadsheet.

9. Scroll down the page and verify the employee data. You can manually adjust employee information, as needed.



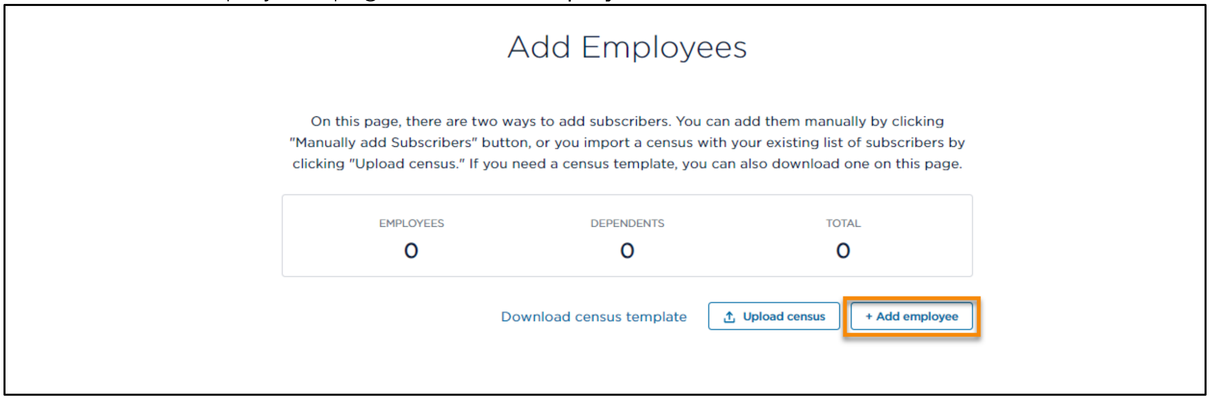
10. Once you have completed adding employees, scroll to the bottom of the page and click Next to generate the Quote and move forward with reviewing the All Plans Quote, performing quote comparisons and evaluating quote details.



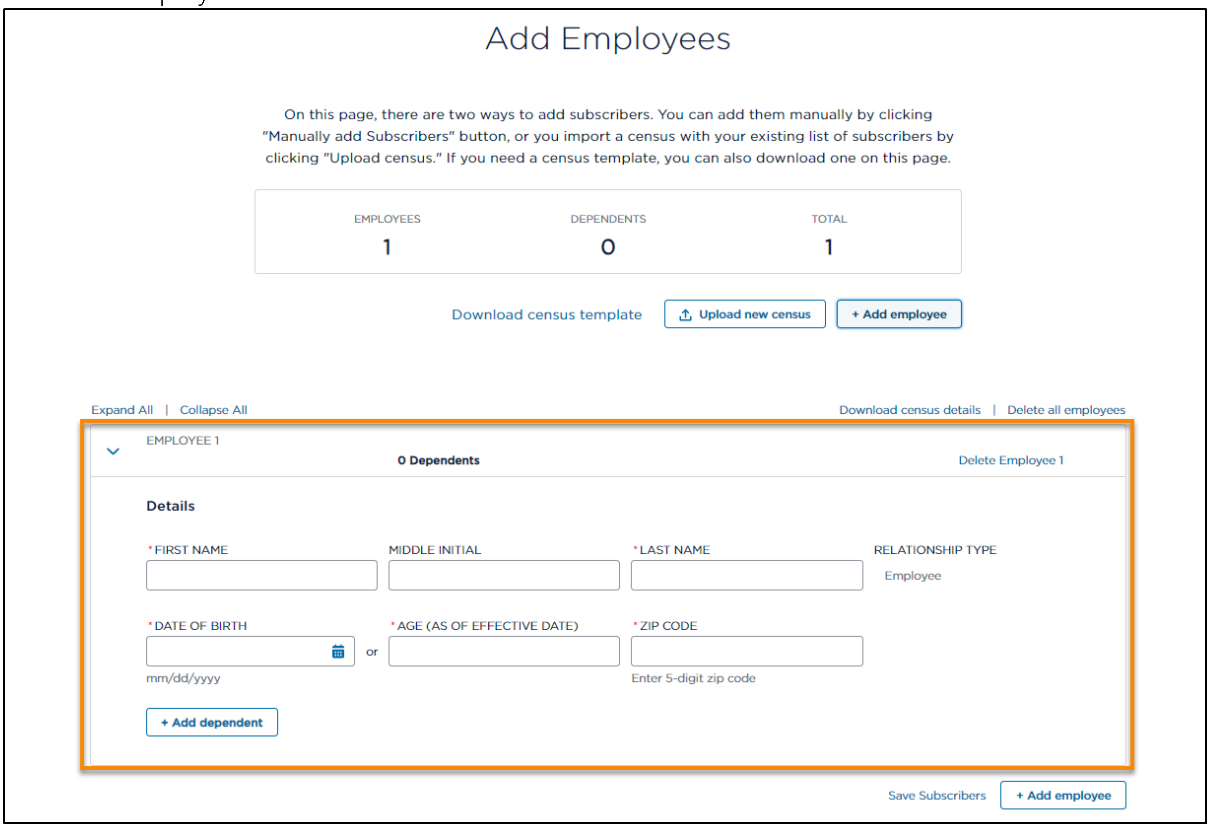
Manually Add Employees

If you prefer to manually enter employees, follow these steps:

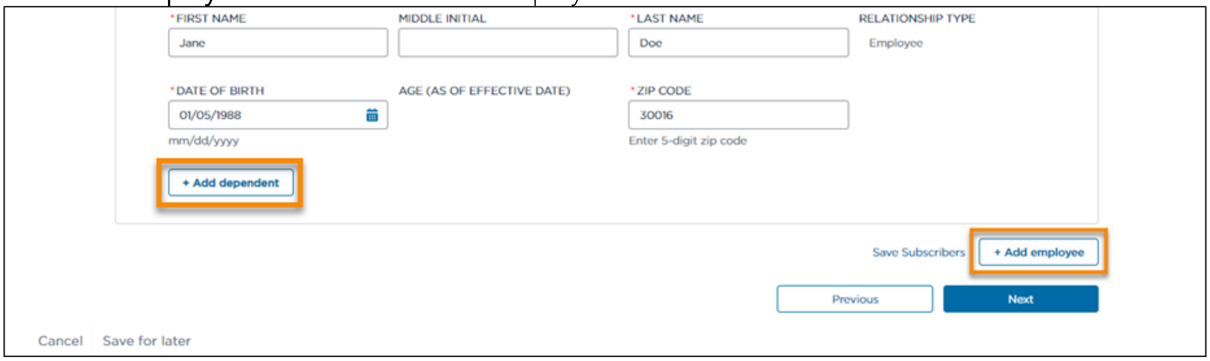
1. From the 'Add Employees' page, click **Add Employee**.



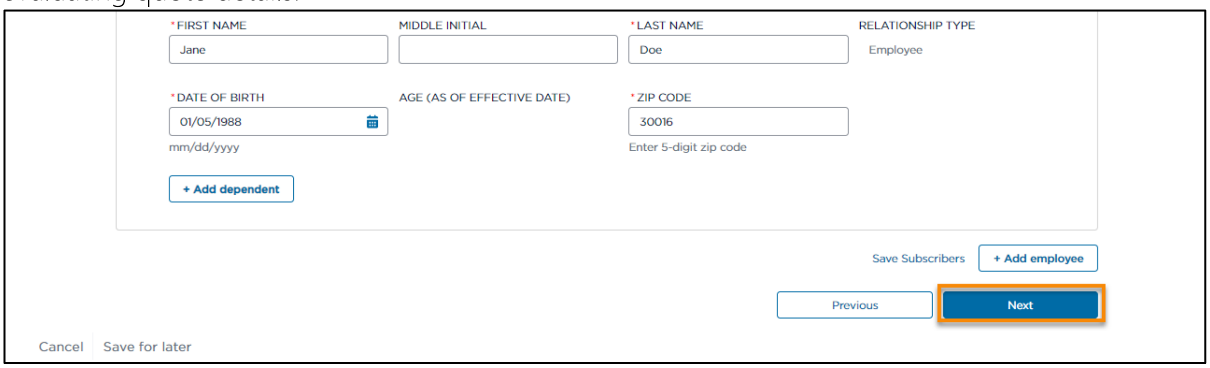
2. Enter the employee information.



3. Click **Add Dependent** to add a dependent under the Employee.
4. Click **Add Employee** for each additional employee.



5. When you have completed manually adding employees, click **Next**. When Next is selected, the Quote is generated and you can move forward with reviewing the All Plans Quote, performing quote comparisons and evaluating quote details.

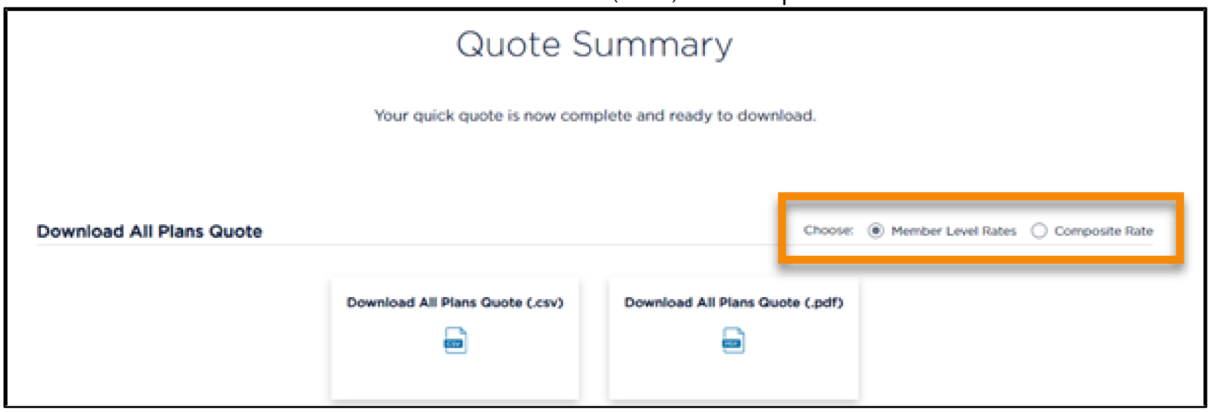


Review Plans and Rates

Download and Review All Plans Quote

The quote is generated once you arrive at the 'Quote Summary' page. You do not need to take any further actions; however, you can compare plans and rates from this screen.

1. Choose the radio button for Member Level Rates (MLR) or Composite Rate.

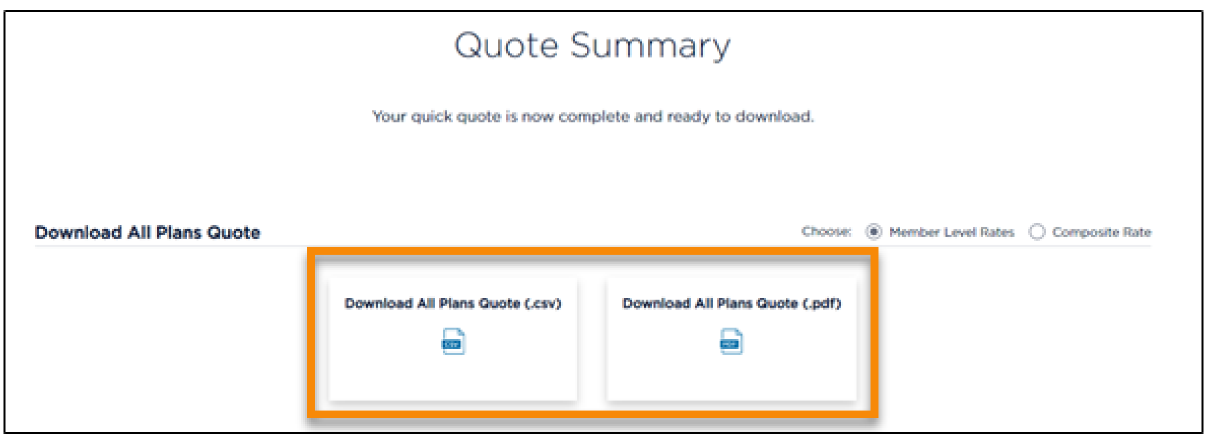


2. Next, Download Plans to your computer. There are two options:
   a. Option 1: Download the All Plans Quote (.csv)

      Both the MLR and Composite rates are included in the file, on separate tabs.

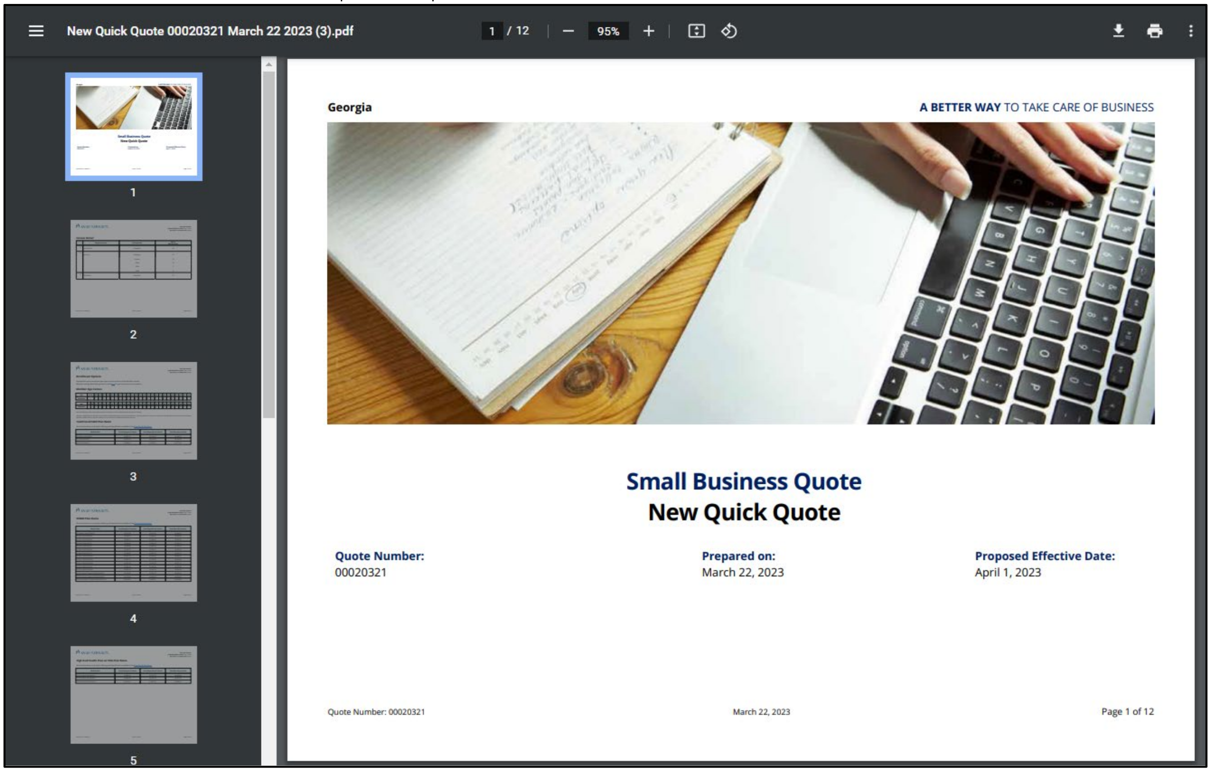
   b. Option 2: Download the All Plans Quote (.pdf)

      The file will contain Member OR Composite Rate information based on the selection made in step 1.

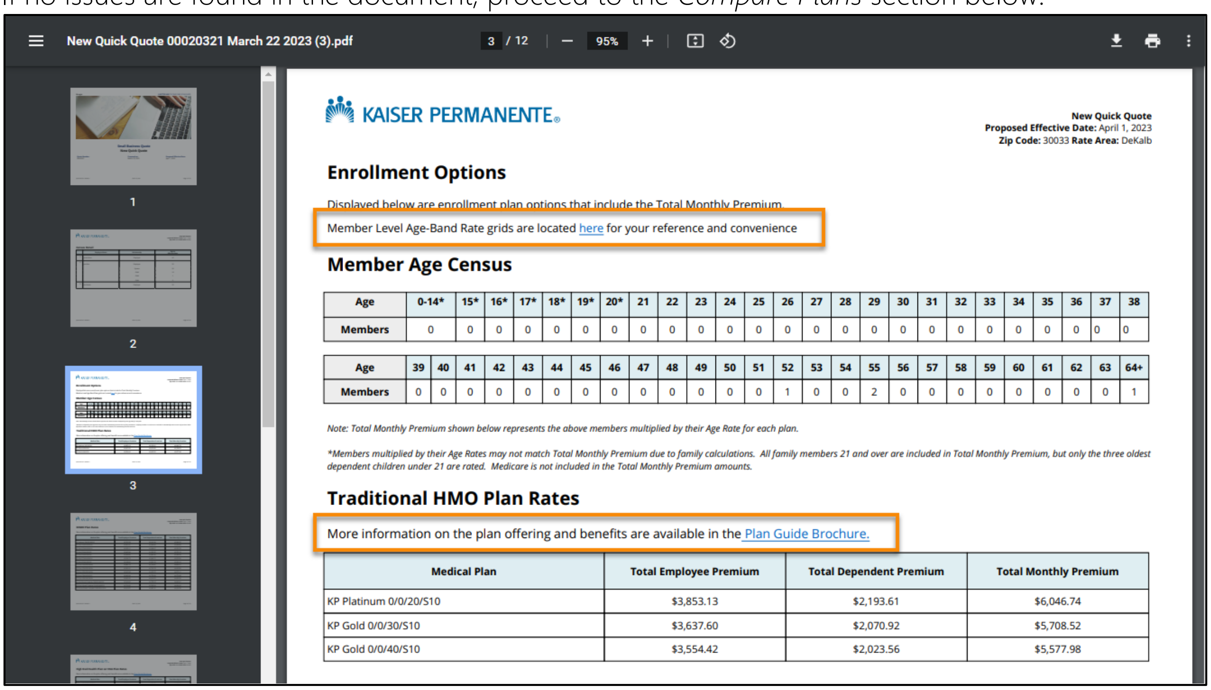


Note: If the download is large, processing time can become long. If needed, you can close out the dialog box to end the export process and download at a later time.

3. When the download is complete, open the download to review the document.



4. Scroll down the page. Note the links for the Member Level Age-Band Rate grids and Plan Guide Brochure.
5. If no issues are found in the document, proceed to the *Compare Plans* section below.



Enrollment Options

Displayed below are enrollment plan options that include the Total Monthly Premium.

Member Level Age-Band Rate grids are located here for your reference and convenience

Member Age Census

Age	0-14*	15*	16*	17*	18*	19*	20*	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
Members	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Age	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64+
Members	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	2	0	0	0	0	0	0	0	0	1

Note: Total Monthly Premium shown below represents the above members multiplied by their Age Rate for each plan.

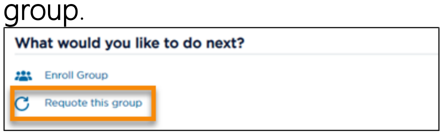
**Members multiplied by their Age Rates may not match Total Monthly Premium due to family calculations. All family members 21 and over are included in Total Monthly Premium, but only the three oldest dependent children under 21 are rated. Medicare is not included in the Total Monthly Premium amounts.*

Traditional HMO Plan Rates

More information on the plan offering and benefits are available in the Plan Guide Brochure.

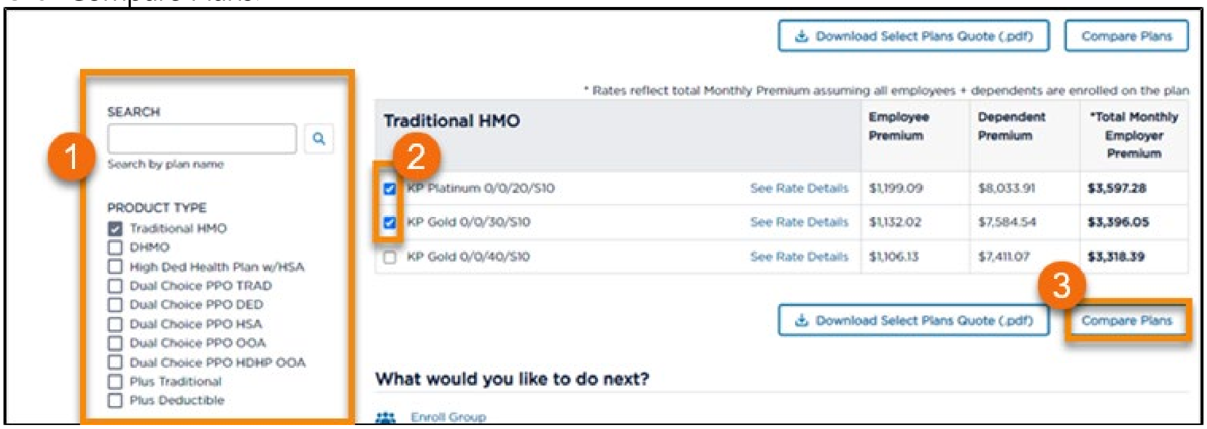
Medical Plan	Total Employee Premium	Total Dependent Premium	Total Monthly Premium
KP Platinum 0/0/20/S10	$3,853.13	$2,193.61	$6,046.74
KP Gold 0/0/30/S10	$3,637.60	$2,070.92	$5,708.52
KP Gold 0/0/40/S10	$3,554.42	$2,023.56	$5,577.98

6. If issues are found in the document, return to the *Quote Summary* screen, scroll down and select Requote this group.

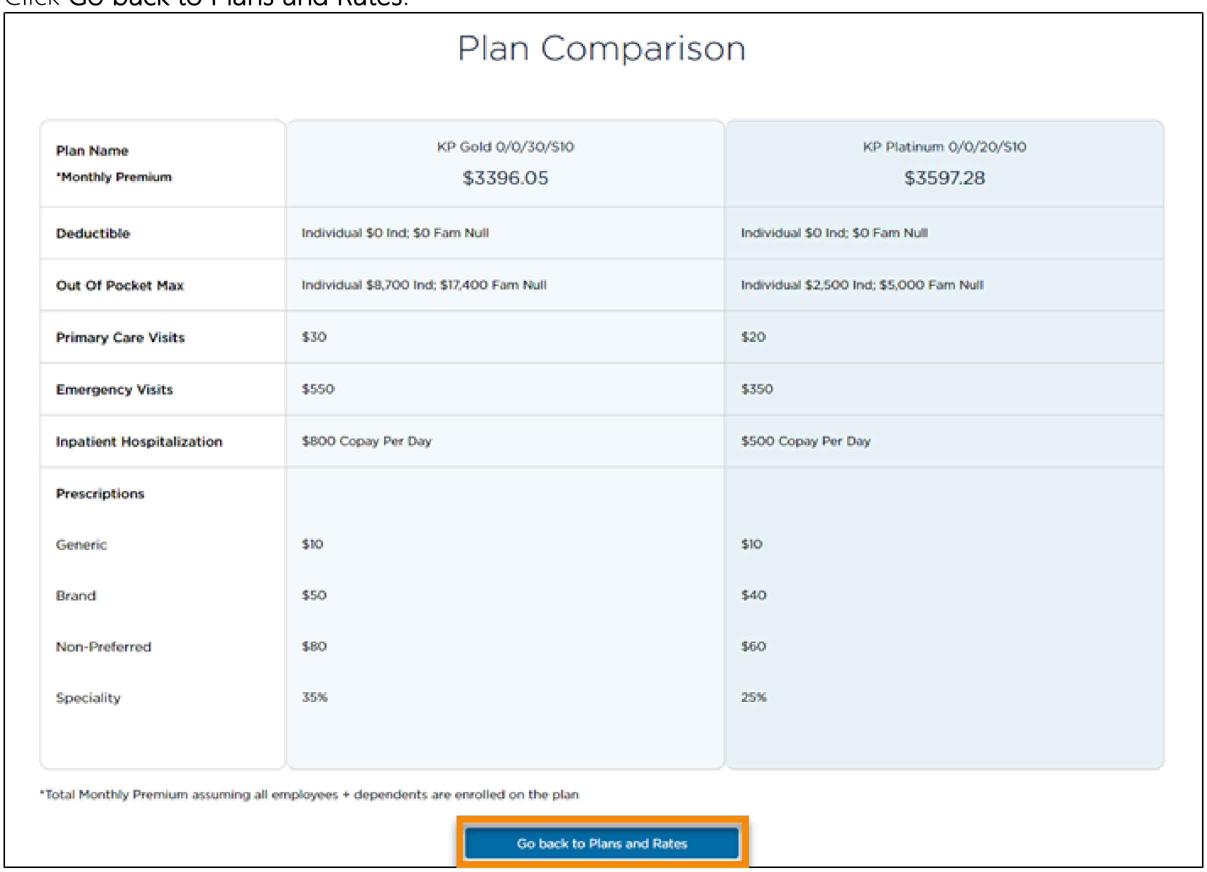


Compare Plans

1. Locate the plans you want to compare. Use the Search field, or Filters to narrow results.
2. Click the checkbox for up to 3 plans to compare.
3. Click Compare Plans.



4. Review the information.
5. Click Go back to Plans and Rates.



Plan Comparison

Plan Name *Monthly Premium	KP Gold 0/0/30/S10 $3396.05	KP Platinum 0/0/20/S10 $3597.28
Deductible	Individual $0 Ind; $0 Fam Null	Individual $0 Ind; $0 Fam Null
Out Of Pocket Max	Individual $8,700 Ind; $17,400 Fam Null	Individual $2,500 Ind; $5,000 Fam Null
Primary Care Visits	$30	$20
Emergency Visits	$550	$350
Inpatient Hospitalization	$800 Copay Per Day	$500 Copay Per Day
Prescriptions		
Generic	$10	$10
Brand	$50	$40
Non-Preferred	$80	$60
Speciality	35%	25%

*Total Monthly Premium assuming all employees + dependents are enrolled on the plan

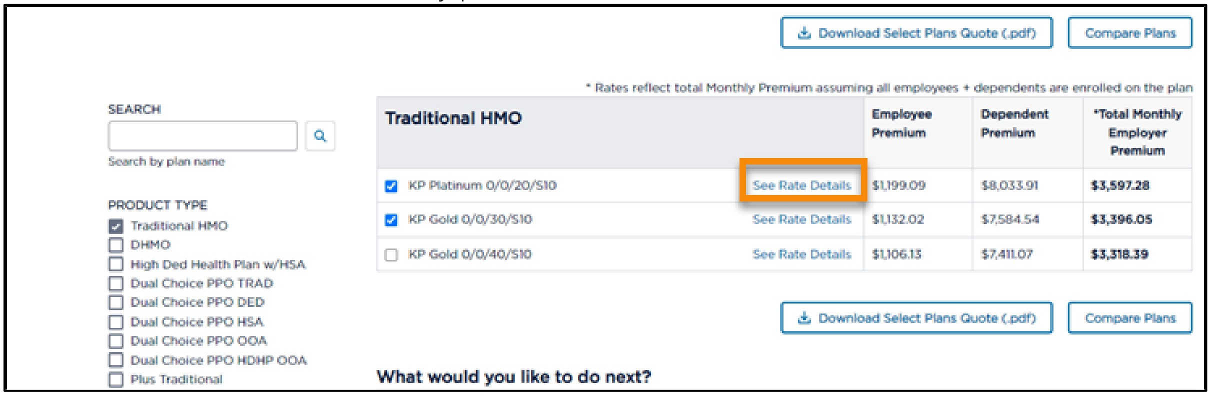
Go back to Plans and Rates

6. Repeat the Plan Comparison as needed to identify a suitable recommendation for the group.

Review Rate Details

Review the rate details for one plan at-a-time. Rate review can be performed from the All Quote Summary page or from a filtered view.

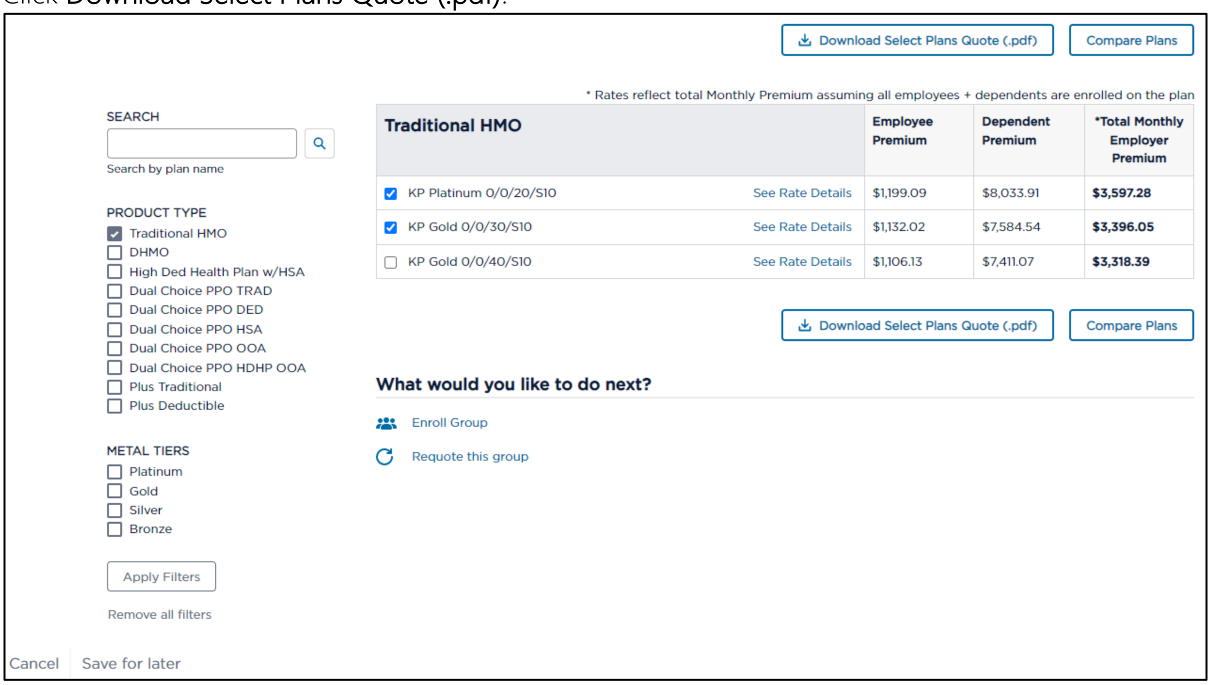
1. Click the See Rate Details link for any plan.



2. After completing the review, click the Return to Quote Summary.
3. Repeat review steps as often as required

Download Select Plans

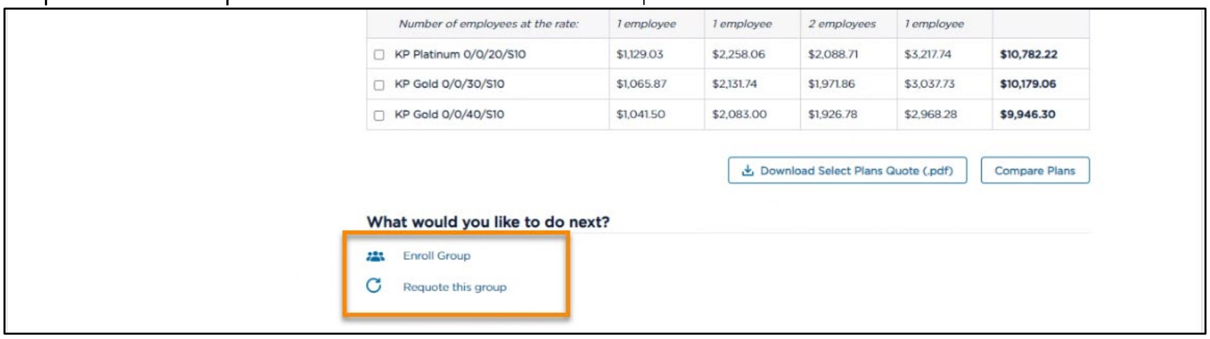
1. After reviewing the plan comparisons, check the box for all plans that you want to be associated with the Quote.
2. Click Download Select Plans Quote (.pdf).



Create Alternate Quote or Enroll the Group

At the bottom of the Quote Summary page, you will notice options for the following:

- Enroll Group- Click here to convert to buy. Refer to the job aid 'New Self Service Group Enrollment'.
- Requote this Group- Refer to 'Create Alternate Group' section below.



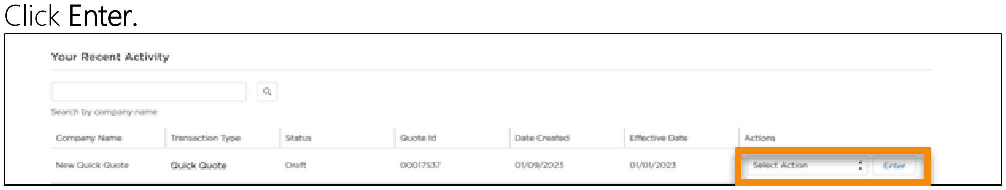
Create Alternate Quote

Requote

Rating factors include group zip code, census and effective date. To create an alternate quote with new ratings, use the Requote option.

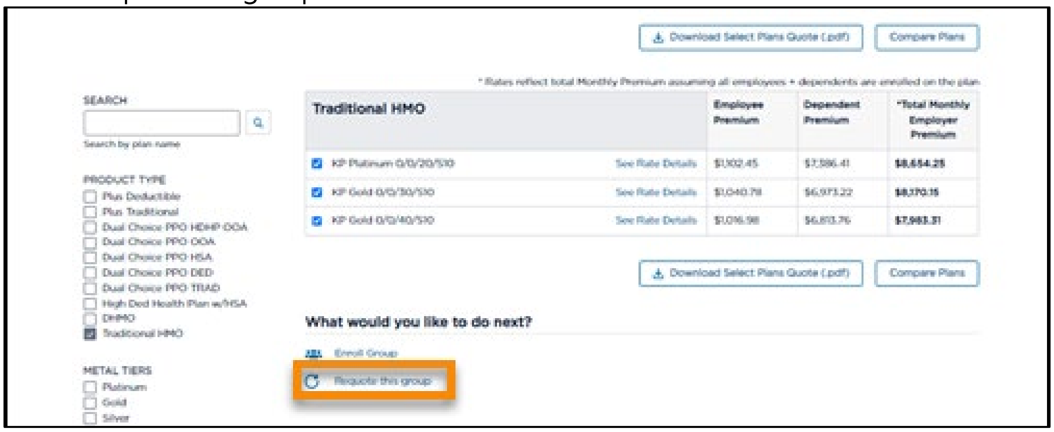
Note: Requoting creates a separate Quote ID.

1. To Requote do one of the following:
    a. Go to 'Your Recent Activity'.
        i. Find the Group name.
        ii. Click the Actions drop down and select **Requote.**
        iii. Click **Enter.**



    b. From the Quote Summary Page
        i. Go to the 'What would you like to do next?' section at the bottom of the page.

ii. Select **Requote this group**.

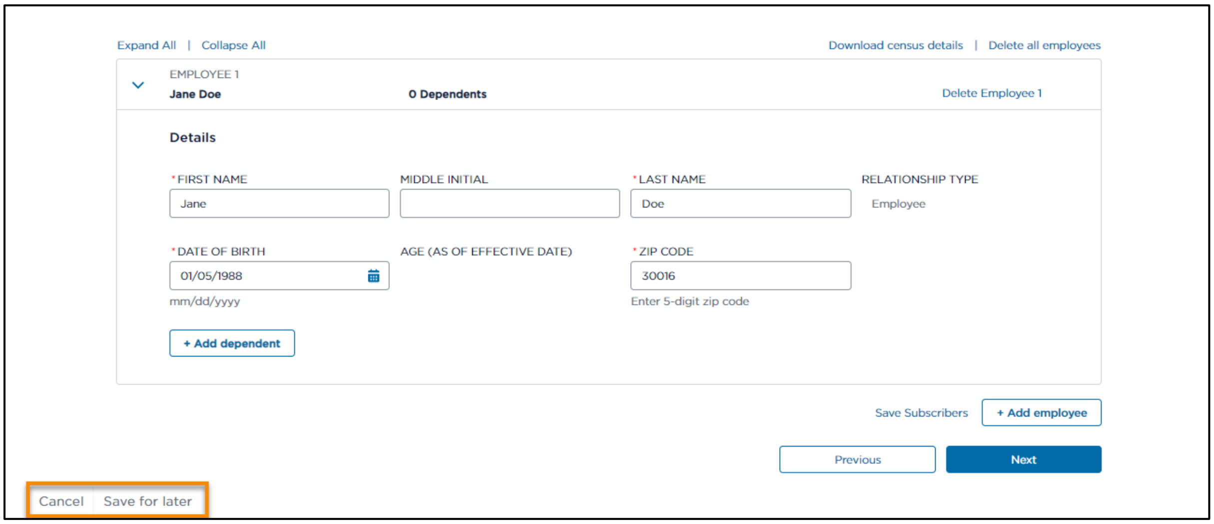


2. When a Requote is selected, the system will generate a new Quick Quote.
    a. Group Details will be populated with information that was previously completed. Adjust, if needed.
    b. Click **Next.**
3. Adjust the Census
    a. If Upload new census is selected a warning will display reminding you that the previous Census will be replaced.
    b. If an upload is not needed make manual adjustments / corrections to the census information.
    c. Click **Next**.
4. The quote will generate, and the Quote Summary will be displayed.
    a. Complete the All Plan download and review, plan comparisons and detailed plan review.ancel, Save or Edit a Quick Quote

Cancel, Save or Edit a Quote

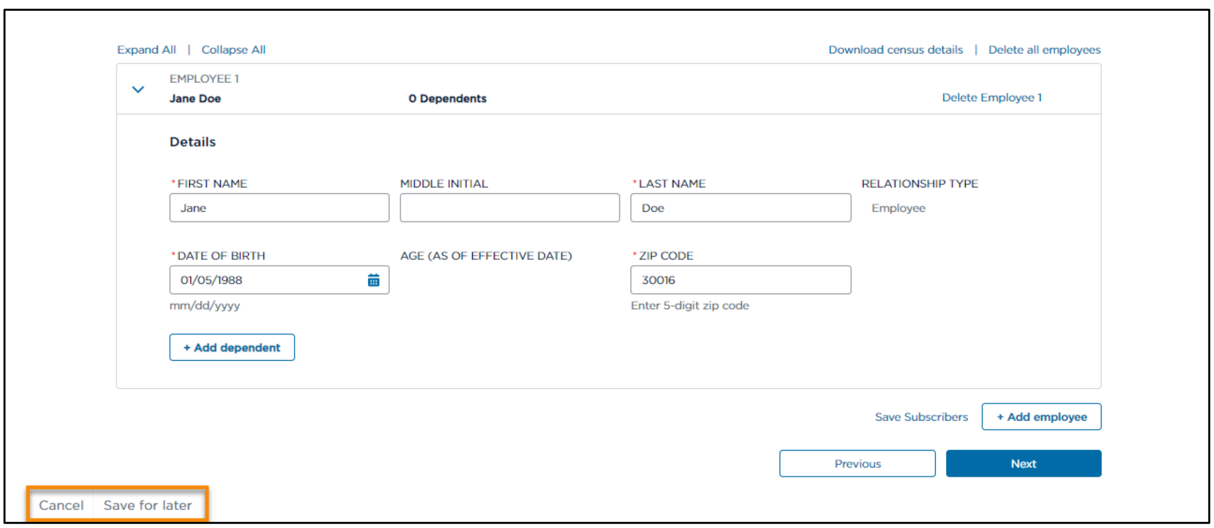
Cancel a Quote

1. If you wish to abandon a quote you've started, click Cancel (no work is saved, and you'll need to start over).



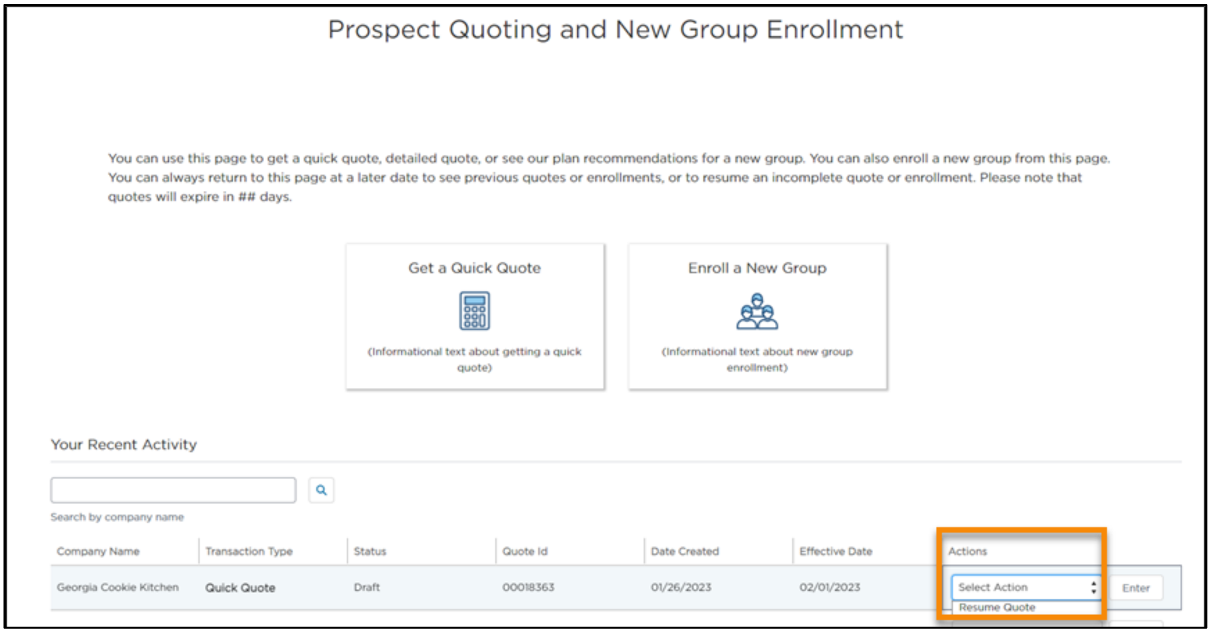
Save a Quote for later

1. If you would like to pause your quote to return to it later, click Save for later.



2. To return to your saved point in the Quote, go to the 'Prospect and New Group Enrollment' page.
3. Go to the 'Your Recent Activity' list.
4. Click the Actions drop down menu for the quote you wish to resume.
5. Select Resume Quote.

6. Click the **Enter** button.



Edit a Quote

You can modify a Quick Quote after it has been generated.

1. Return to the 'Prospect and New Group Enrollment' page.
2. Locate the Quote in the 'Your Recent Activity' list.
3. Click the **Actions** menu for the Quote you wish to modify.
4. Select **Requote** and click **Enter**.