



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

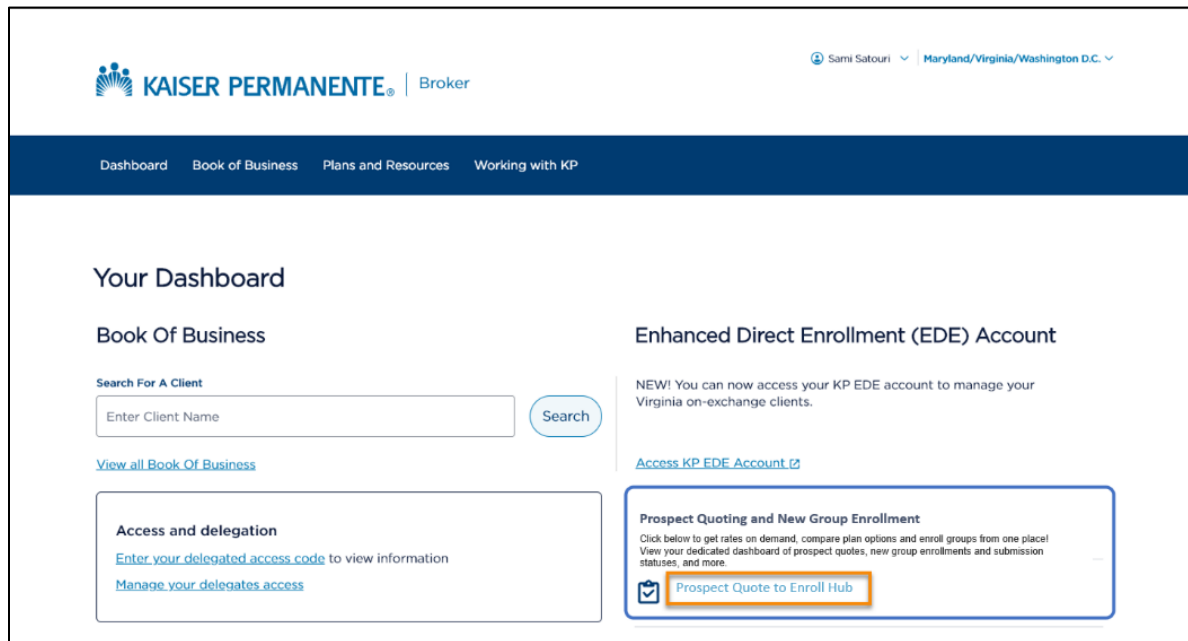
Region: Enterprise/GA

Sales Connect Version: GA Release 11.0/11.1

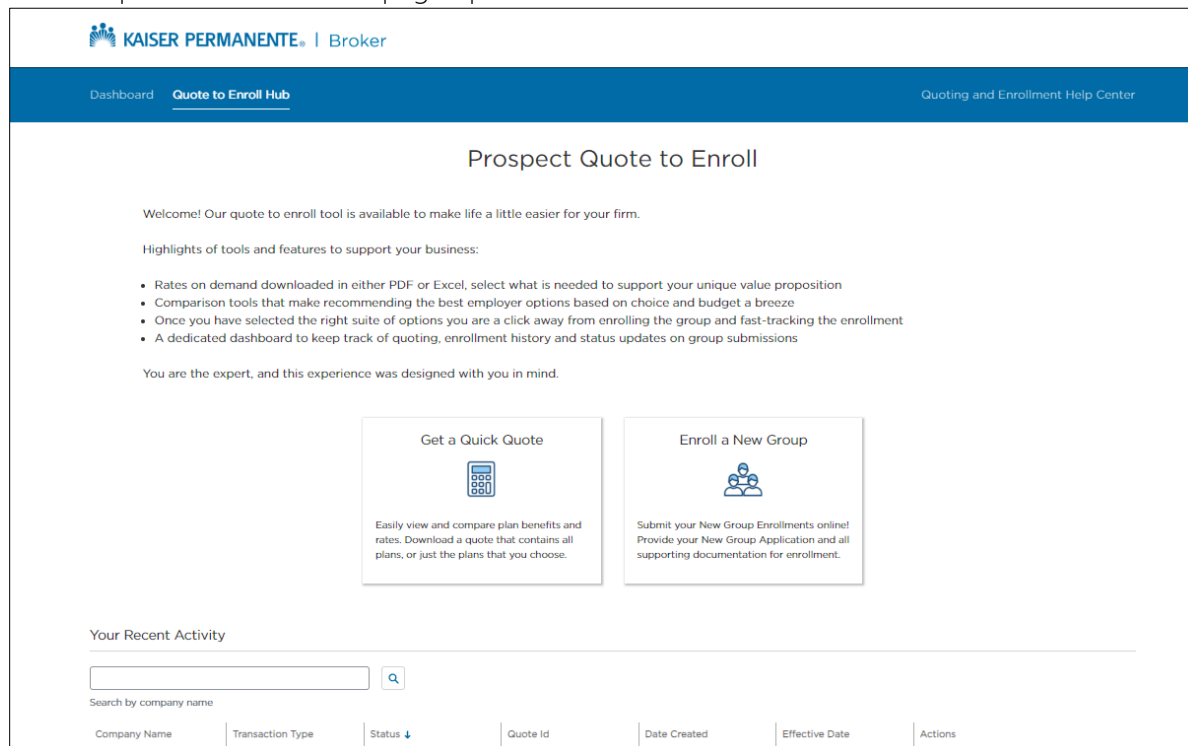
Open the Quoting Tool

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.



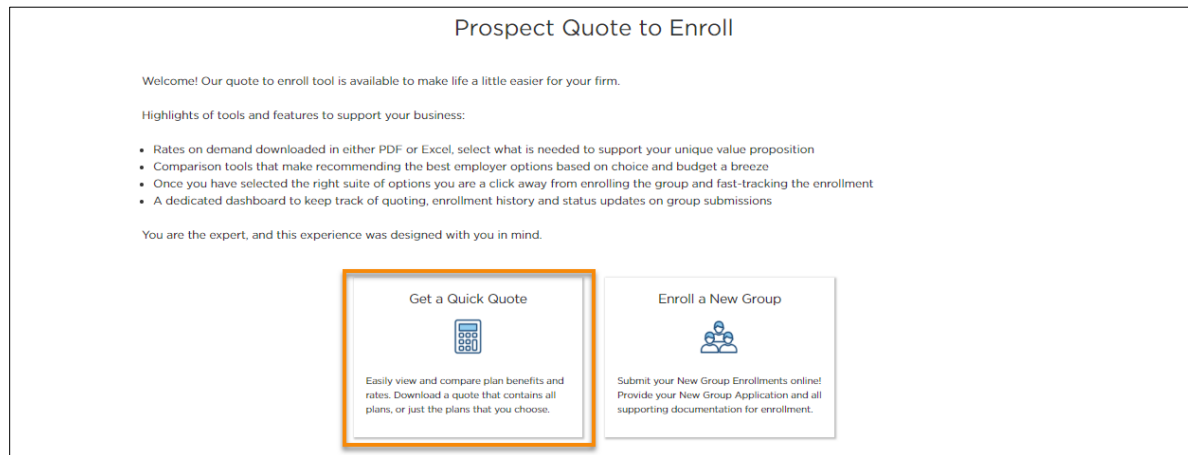
3. The 'Prospect Quote to Enroll' page opens.



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

- 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.
- 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

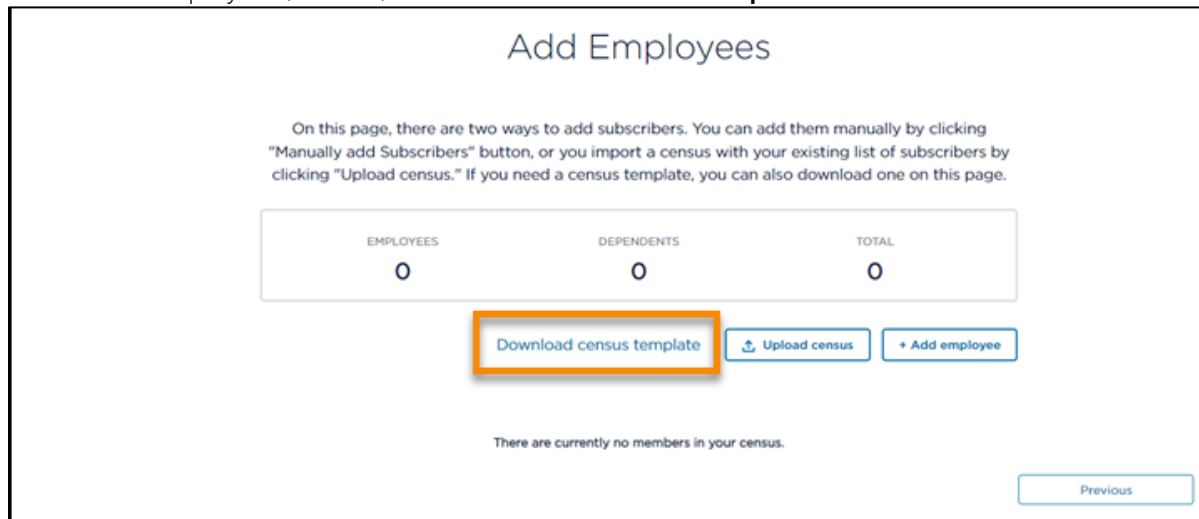
Add Census Information for each Employee

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.

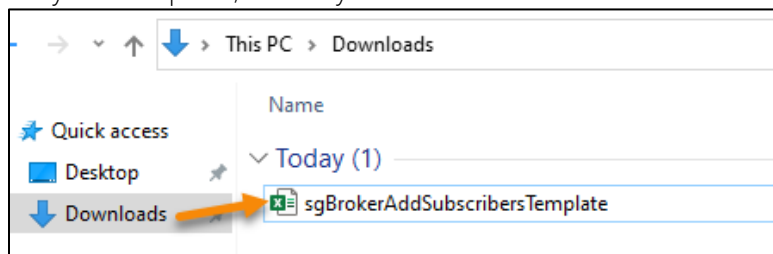
Upload employees using a Census template

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**.



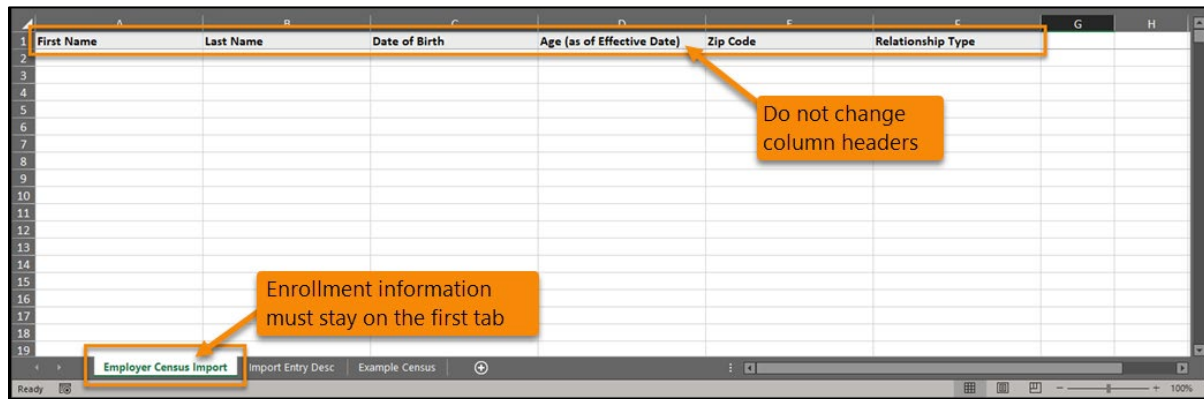
2. On your computer, search your Download folder for the excel file **sgBrokerAddSubscribersTemplate**.



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

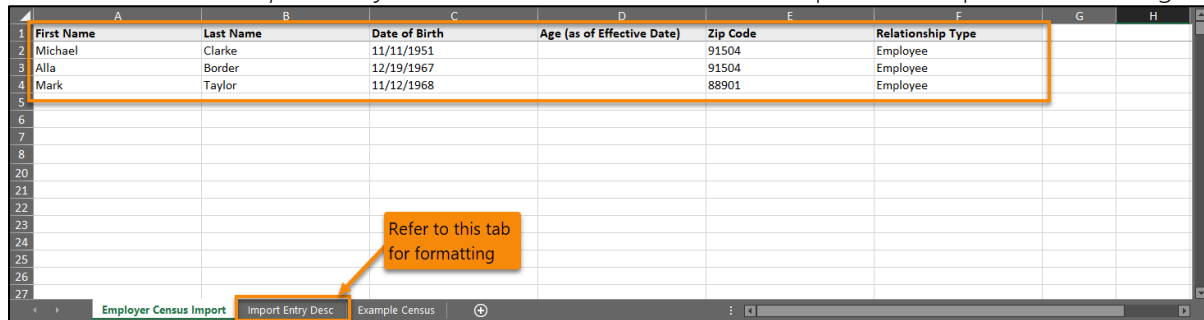
Important

- 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.



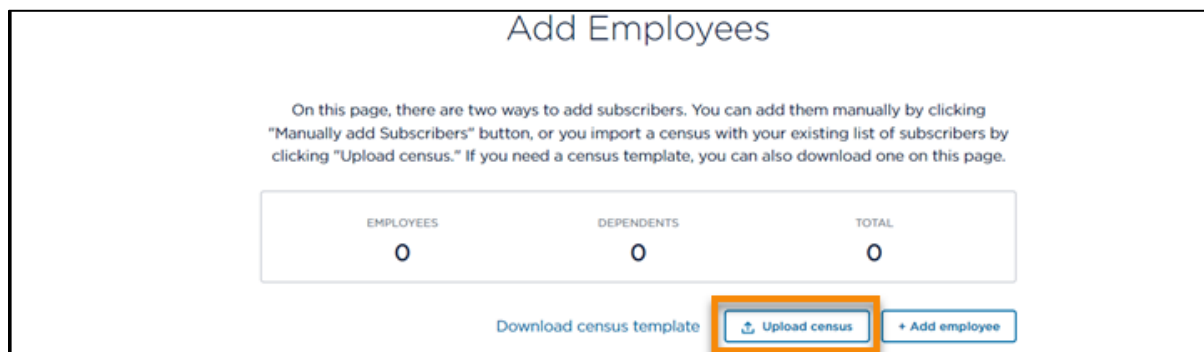
4. Enter employee information to the template (First Name, Last Name, etc).

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.

This screenshot shows the top summary section of the employee data interface. It features a table with three columns: EMPLOYEES (2), DEPENDENTS (1), and TOTAL (3). Below the table are buttons for 'Download census template', 'Upload new census', and '+ Add employee'. The main section below is titled 'EMPLOYEE 1' and '1 Dependent'. It includes a 'Details' section with input fields for 'FIRST NAME' (Aila), 'MIDDLE INITIAL', 'LAST NAME' (Border), and 'RELATIONSHIP TYPE' (Employee). An orange arrow points to the 'FIRST NAME' field. At the bottom, there are fields for 'DATE OF BIRTH', 'AGE (AS OF EFFECTIVE DATE)', and 'ZIP CODE'.

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.

This screenshot shows the 'Details' section of the employee data interface. It includes input fields for 'FIRST NAME' (Jane), 'MIDDLE INITIAL', 'LAST NAME' (Doe), and 'RELATIONSHIP TYPE' (Employee). Below these are fields for 'DATE OF BIRTH' (01/05/1988), 'AGE (AS OF EFFECTIVE DATE)', and 'ZIP CODE' (30016). A '+ Add dependent' button is located below the birth date field. At the bottom right, there are buttons for 'Previous' and 'Next', with the 'Next' button highlighted by an orange box. Other buttons include 'Save Subscribers', '+ Add employee', 'Cancel', and 'Save for later'.

Manually Add Employees

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

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

Add Employees

On this page, there are two ways to add subscribers. You can add them manually by clicking "Manually add Subscribers" button, or you import a census with your existing list of subscribers by clicking "Upload census." If you need a census template, you can also download one on this page.

EMPLOYEES	DEPENDENTS	TOTAL
0	0	0

[Download census template](#)[Upload census](#)[+ Add employee](#)

2. Enter the employee information.

Add Employees

On this page, there are two ways to add subscribers. You can add them manually by clicking "Manually add Subscribers" button, or you import a census with your existing list of subscribers by clicking "Upload census." If you need a census template, you can also download one on this page.

EMPLOYEES	DEPENDENTS	TOTAL
1	0	1

[Download census template](#)[Upload new census](#)[+ Add employee](#)

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

EMPLOYEE 1

0 Dependents

Delete Employee 1

Details

*FIRST NAME

MIDDLE INITIAL

*LAST NAME

RELATIONSHIP TYPE

Employee

*DATE OF BIRTH

*AGE (AS OF EFFECTIVE DATE)

*ZIP CODE

or

mm/dd/yyyy

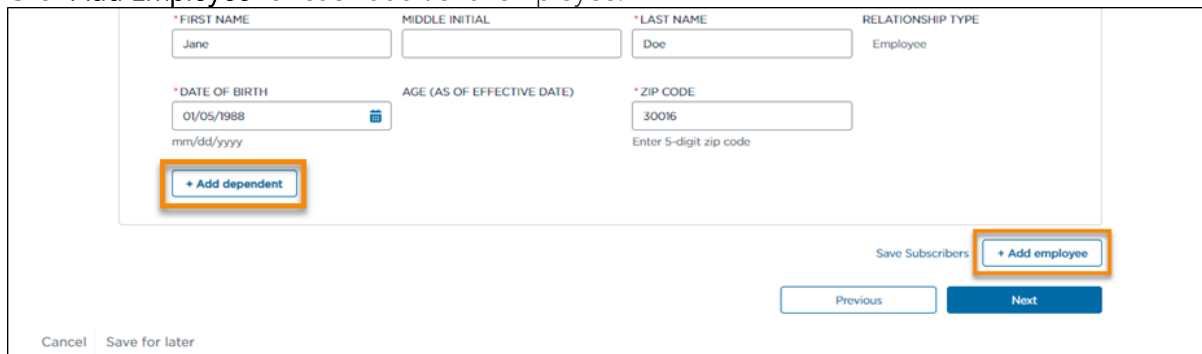
Enter 5-digit zip code

+ Add dependent

Save Subscribers

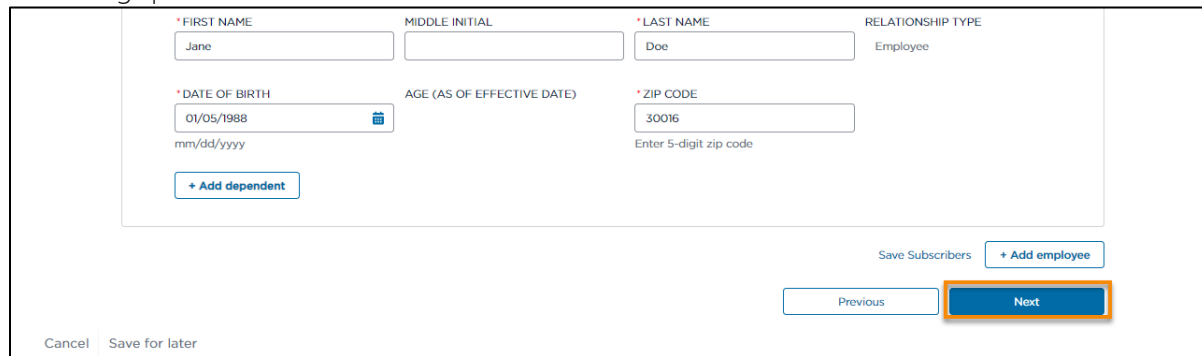
+ Add employee

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



This screenshot shows a form for adding a dependent. The form includes fields for First Name (Jane), Middle Initial, Last Name (Doe), Relationship Type (Employee), Date of Birth (01/05/1988), Age (AS OF EFFECTIVE DATE), and Zip Code (30016). A blue button labeled '+ Add dependent' is highlighted with an orange box. At the bottom right, there is a 'Save Subscribers' link and a '+ Add employee' button, also highlighted with an orange box. Navigation buttons 'Previous' and 'Next' are at the bottom right, and 'Cancel' and 'Save for later' are at the bottom left.

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.



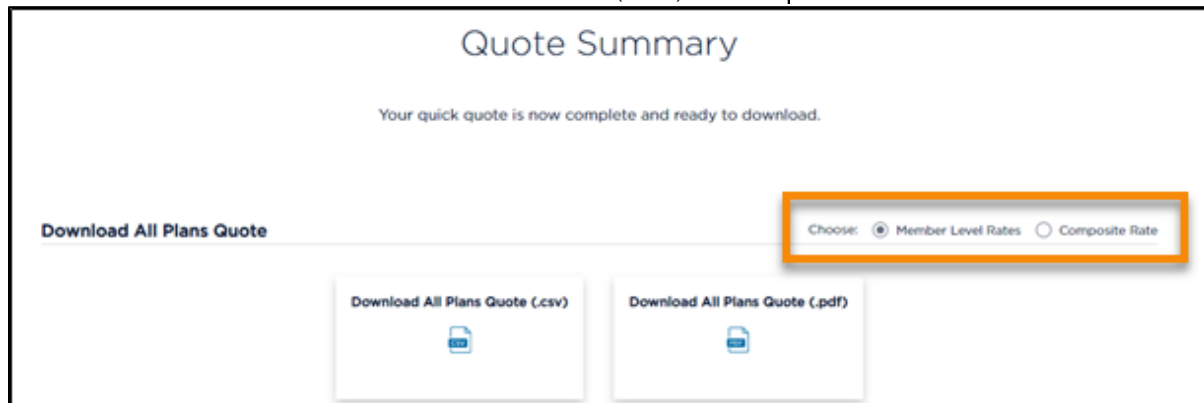
This screenshot shows the same form as above, but with the '+ Add employee' button highlighted with an orange box. The '+ Add dependent' button is also visible. The 'Next' button at the bottom right is highlighted with an orange box. The 'Previous' button is also visible. The 'Cancel' and 'Save for later' buttons are at the bottom left.

Review Plans and Rates

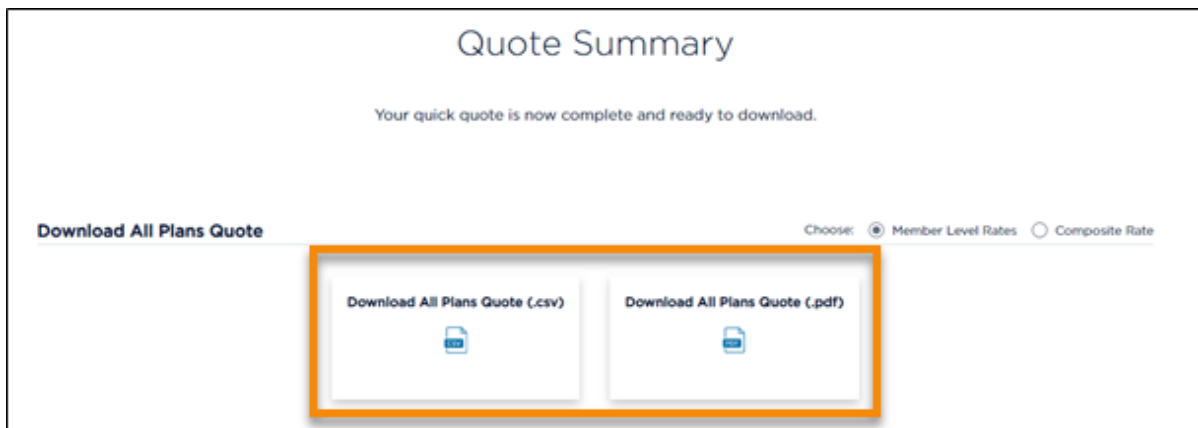
Download and Review All Plans Quote

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**.

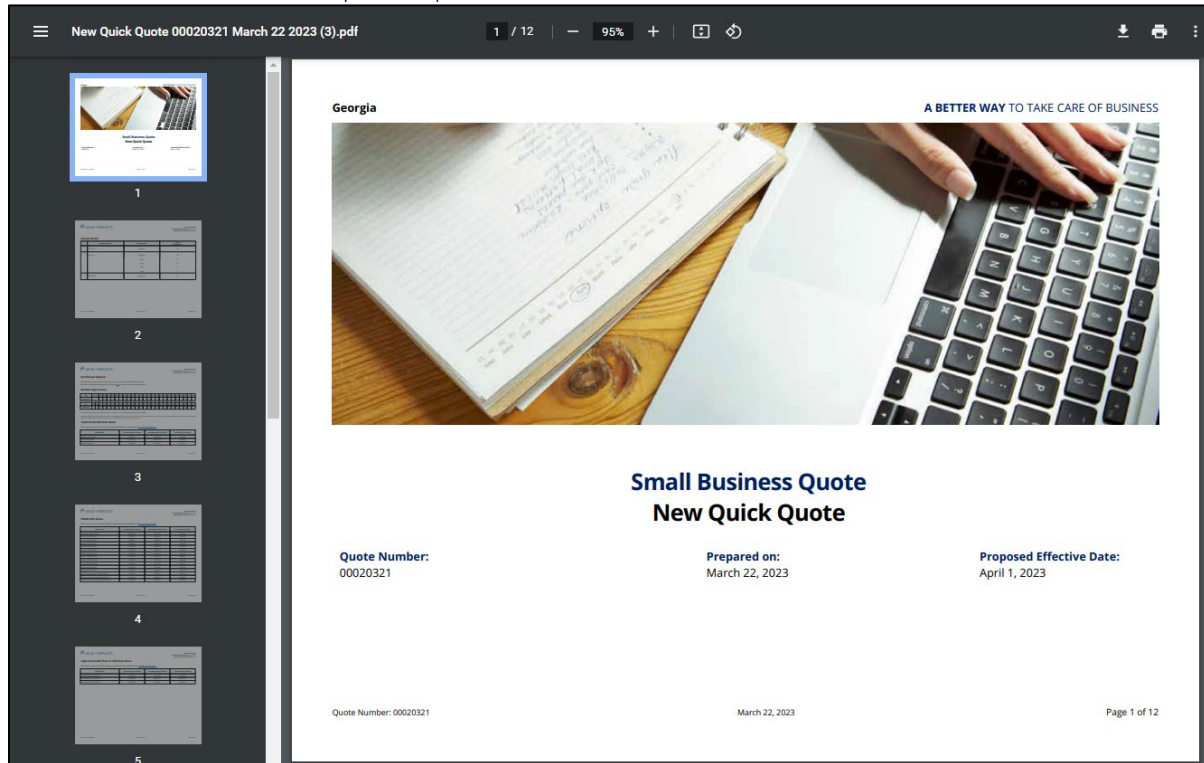


2. Next, Download Plans to your computer. There are two options:
 - a. Option 1: **Download the All Plans Quote (.csv)**
Both the MLR and Composite rates are included in the file, on separate tabs.
 - b. Option 2: **Download the All Plans Quote (.pdf)**
The file will contain Member OR Composite Rate 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.

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



- Scroll down the page. Note the links for the **Member Level Age-Band Rate grids** and **Plan Guide Brochure**.
- 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

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

What would you like to do next?

[Enroll Group](#)

[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**.

The screenshot shows a web interface for selecting health plans. On the left, a sidebar contains a search bar (callout 1) and a list of product types under 'PRODUCT TYPE', with 'Traditional HMO' selected. The main area displays a table of 'Traditional HMO' plans (callout 2). The table has columns for plan name, 'See Rate Details', 'Employee Premium', 'Dependent Premium', and '*Total Monthly Employer Premium'. Three plans are listed: 'KP Platinum Q/Q/20/S10', 'KP Gold Q/Q/30/S10', and 'KP Gold Q/Q/40/S10'. The first two are checked. At the bottom right, a 'Compare Plans' button is highlighted with callout 3. Other buttons include 'Download Select Plans Quote (.pdf)' and 'Enroll Group'.

Traditional HMO	See Rate Details	Employee Premium	Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/> KP Platinum Q/Q/20/S10	See Rate Details	\$1,199.09	\$8,033.91	\$3,597.28
<input checked="" type="checkbox"/> KP Gold Q/Q/30/S10	See Rate Details	\$1,132.02	\$7,584.54	\$3,396.05
<input type="checkbox"/> KP Gold Q/Q/40/S10	See Rate Details	\$1,106.13	\$7,411.07	\$3,318.39

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

Plan Comparison

Plan Name	KP Gold Q/Q/30/S10	KP Platinum Q/Q/20/S10
*Monthly Premium	\$3396.05	\$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
Specialty	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.

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

* Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan

Traditional HMO		Employee Premium	Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/> KP Platinum 0/0/20/S10	See Rate Details	\$1,199.09	\$8,033.91	\$3,597.28
<input checked="" type="checkbox"/> KP Gold 0/0/30/S10	See Rate Details	\$1,132.02	\$7,584.54	\$3,396.05
<input type="checkbox"/> KP Gold 0/0/40/S10	See Rate Details	\$1,106.13	\$7,411.07	\$3,318.39

What would you like to do next?

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)**.

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

* Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan

Traditional HMO		Employee Premium	Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/> KP Platinum 0/0/20/S10	See Rate Details	\$1,199.09	\$8,033.91	\$3,597.28
<input checked="" type="checkbox"/> KP Gold 0/0/30/S10	See Rate Details	\$1,132.02	\$7,584.54	\$3,396.05
<input type="checkbox"/> KP Gold 0/0/40/S10	See Rate Details	\$1,106.13	\$7,411.07	\$3,318.39

What would you like to do next?

- [Enroll Group](#)
- [Requote this group](#)

Cancel Save for later

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.

Number of employees at the rate:	1 employee	1 employee	2 employees	1 employee	
<input type="checkbox"/> KP Platinum 0/0/20/S10	\$1,129.03	\$2,258.06	\$2,088.71	\$3,217.74	\$10,782.22
<input type="checkbox"/> KP Gold 0/0/30/S10	\$1,065.87	\$2,131.74	\$1,971.86	\$3,037.73	\$10,179.06
<input type="checkbox"/> KP Gold 0/0/40/S10	\$1,041.50	\$2,083.00	\$1,926.78	\$2,968.28	\$9,946.30

[Download Select Plans Quote \(.pdf\)](#) [Compare Plans](#)

What would you like to do next?

 Enroll Group

 Requote this group

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**.

Your Recent Activity

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
New Quick Quote	Quick Quote	Draft	00017537	01/09/2023	01/01/2023	Select Action  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.

SEARCH

Search by plan name

PRODUCT TYPE

- ☐ Plus Deductible
- ☐ Plus Traditional
- ☐ Dual Choice PPO HDHP OOA
- ☐ Dual Choice PPO OOA
- ☐ Dual Choice PPO HSA
- ☐ Dual Choice PPO DED
- ☐ Dual Choice PPO TRAD
- ☐ High Ded Health Plan w/HSA
- ☐ DEDMO
- ☒ Traditional HMO

METAL TIERS

- ☐ Platinum
- ☐ Gold
- ☐ Silver

Traditional HMO

* Rates reflect total Monthly Premium assuming all employees + dependents are enrolled on the plan.

		Employee Premium	Dependent Premium	*Total Monthly Employer Premium
<input checked="" type="checkbox"/> KP Platinum Q/D/20/5/30	See Rate Details	\$1,032.45	\$7,586.41	\$8,654.25
<input checked="" type="checkbox"/> KP Gold Q/D/30/5/30	See Rate Details	\$1,040.78	\$6,973.22	\$8,370.15
<input checked="" type="checkbox"/> KP Gold Q/D/40/5/30	See Rate Details	\$1,076.98	\$6,813.76	\$7,983.31

Download Select Plans Quote (.pdf) Compare Plans

Download Select Plans Quote (.pdf) Compare Plans

What would you like to do next?

Email Group

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).

The screenshot shows a web form for managing a quote. At the top, there are links for 'Expand All', 'Collapse All', 'Download census details', and 'Delete all employees'. Below this is a section for 'EMPLOYEE 1' with a dropdown arrow and the name 'Jane Doe'. To the right of the name is '0 Dependents' and a 'Delete Employee 1' link. The main section is titled 'Details' and contains several input fields: 'FIRST NAME' (Jane), 'MIDDLE INITIAL' (empty), 'LAST NAME' (Doe), 'RELATIONSHIP TYPE' (Employee), 'DATE OF BIRTH' (01/05/1988), 'AGE (AS OF EFFECTIVE DATE)' (empty), and 'ZIP CODE' (30016). There is a '+ Add dependent' button and a '+ Add employee' button. At the bottom right, there are 'Previous' and 'Next' buttons. At the bottom left, there are 'Cancel' and 'Save for later' buttons, with 'Cancel' highlighted by an orange box.

Save a Quote for later

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

This screenshot is identical to the one above, showing the same quote management interface. The 'Cancel' button is no longer highlighted, and the 'Save for later' button is highlighted by an orange box.


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**.

- Click the **Enter** button.

Prospect Quoting and New Group Enrollment


You can use this page to get a quick quote, detailed quote, or see our plan recommendations for a new group. You can also enroll a new group from this page. You can always return to this page at a later date to see previous quotes or enrollments, or to resume an incomplete quote or enrollment. Please note that quotes will expire in ## days.

Get a Quick Quote



(Informational text about getting a quick quote)

Enroll a New Group



(Informational text about new group enrollment)

Your Recent Activity

Q

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
Georgia Cookie Kitchen	Quick Quote	Draft	00018363	01/26/2023	02/01/2023	<div style="border: 1px solid #ccc; padding: 2px;"> Select Action </div> <div style="border: 1px solid #ccc; padding: 2px;"> Resume Quote </div>

Edit a Quote

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

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

Prospect Quoting and New Group Enrollment

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

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

Your Recent Activity

Q

Search by company name

Company Name	Transaction Type	Status	Quote Id	Date Created	Effective Date	Actions
Stacey's Garden	Quick Quote	Completed	00018477	01/31/2023	02/01/2023	<div style="border: 1px solid #ccc; padding: 2px;"> Select Action </div> <div style="border: 1px solid #ccc; padding: 2px;"> Resume Quote </div> <div style="border: 1px solid #ccc; padding: 2px;"> Convert to Buy </div> <div style="border: 1px solid #ccc; padding: 2px;"> Requote </div>