

Self-Service Quoting Overview

Welcome In this video we are excited to introduce the self-service quoting tools on account.kp.org designed for brokers like you.

First, where do you find the broker self-service tools? Start by signing in at account.kp.org. If you're not already registered. No problem. Click Register, complete the short registration form and we'll process your request within 24 business hours.

After logging in, you'll land on your dashboard. Look for the Get Started Now link on the right hand side. This is where you Click to access the small group Quoting and Enrollment tools.

Meet Quick Quote and Detailed Quote. Both Quick Quote and Detailed Quote give you the flexibility to model quoting scenarios on demand. Download detailed proposals, save your work when you need to step away, create alternate quotes based on data you've already entered, and convert your quote to an online enrollment when your group is ready to move forward.

No matter which quoting tool you choose, you'll find the process straightforward and user friendly. Every step is designed to guide you smoothly through the details. Let's take a closer look at the difference between quick quote and detailed quote.

Quick quote is as easy as it gets when your goal is to evaluate all available Kaiser Permanente plans and benefits for your group.

Here's the journey. Click Get a quick quote. Fill in basic group details. Add the group members and then in the Quote summary screen, select a rating type, Compare plans, and then download Proposals once you've identified the best match for your group.

Detailed Quote gives you a more customized quote that assigns plans to individual members based on their unique needs. Click Get a Detailed Quote to begin. Complete the group details, add member data, select and assign plans to each member, choose the rating type and then review and download the detailed quote.

Want to save your work? We know work can tug you in different directions. That is why we added a Save for Later feature so you can step away when you need to and then pick right back up where you left off. Simply return to your recent activity and select Resume to continue.

Need an alternate quote? Whether you're working on a quick quote or detailed quote, you can easily re quote using the same data you already entered. You can find the re quote options under your Recent activity and on the bottom of the quote summary page when you're at the end of the quoting process.

If you need help, the Help Center is just a click away. Check it out for step by step instructions and other helpful resources. Also, be sure to check out the Broker self-service New Group Enrollment Overview video while you're there.

Ready to dive in? Login at account.kp.org to see how these tools can help streamline your quoting process with Kaiser Permanente.