account.kp.org User Guide

KAISER PERMANENTE®

Welcome to your account.kp.org User Guide

Account.kp.org, Kaiser Permanente's website for group plan administration, is designed to help employers and brokers manage membership, payments, and documentation quickly and easily. Our online tools will allow you to:

- Enroll or terminate subscribers, download membership rosters, and order ID cards
- View premium bills in PDF or spreadsheet format, and view payment history
- Pay monthly premiums, set up automatic payments, and manage payment notifications
- Download key group documents like contracts and SBCs

- Watch our account.kp.org introductory video to understand how online administration can save you time!

Your experience is important to us, and we are continuing to develop new tools and site improvements to better support you. We recommend downloading a new copy of this guide twice a year to ensure that you have the most current information.

Welcome to account.kp.org!

NOTE: Our online features may vary by region to accommodate local systems and regulations.

Introduction and What's New?

Account.kp.org is your online home for group administration, offering tools to manage membership, premium payments, and view important documents.

This guide will help you navigate the most commonly used site features.

Top Tips

- **Watch a video**: Brief tutorial videos are available for many of the online tools, and we're continuing to expand our video library.
  - **Look for this symbol for a link to view the relevant tutorial video**
- **Use the right browser**: For the best experience, use Chrome, Edge, or Firefox.
- **Review access**: Make sure the right people have access to your group's information. Review and update the user list at least every six months, and always follow the delegation process when adding new users. Never share your log in credentials with another user.
- **Don't double up**: If your group reports membership electronically via the EDI process, we recommend that you only submit enrollments on account.kp.org when it's critical to enroll a member immediately. Be sure to update your next electronic file to match any changes you made on account.kp.org.

What's New

We've made some updates to improve your experience on account.kp.org.

- Individuals and Families Brokers supporting California can view their Book of Business for Off-Exchange online.
- Streamlined Kaiser Permanente business landing pages and enhanced navigation make using the website easier than ever.
- Easily manage your account online using available account.kp.org tools and tutorials for your market. For Brokers, check out ways to manage your Book of Business online.

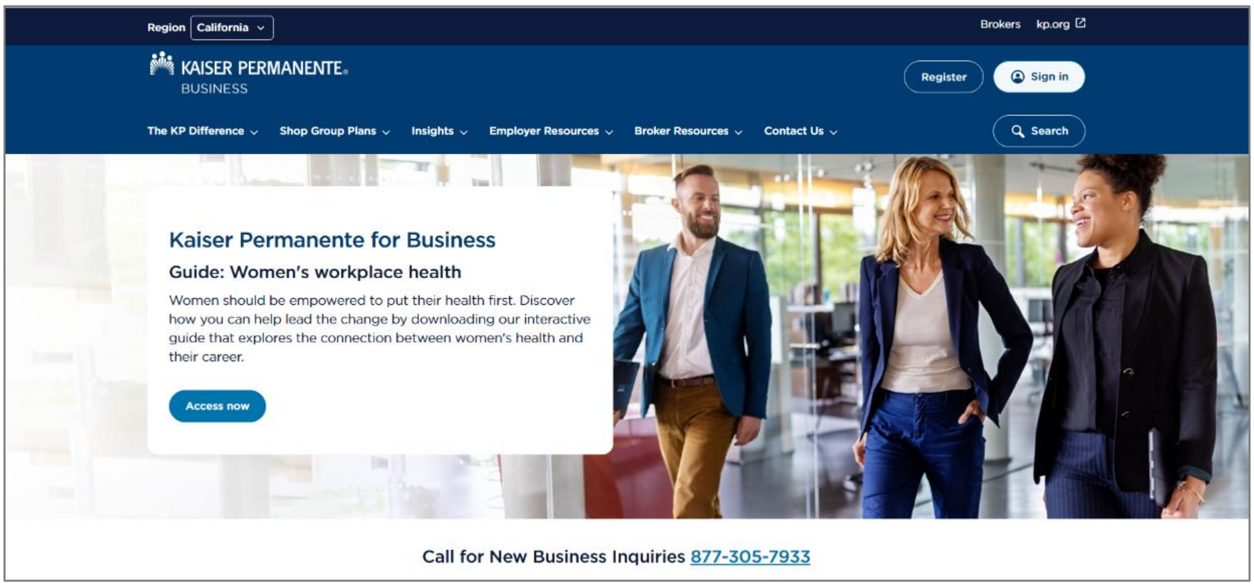
Account.kp.org Access

Primary Group Administrator Registration Instructions

Every group needs a Primary Group Administrator, or PGA. We recommend this be the business owner for smaller groups, or an HR representative for larger groups. The contract signer for your group will need to approve the PGA to ensure data security.

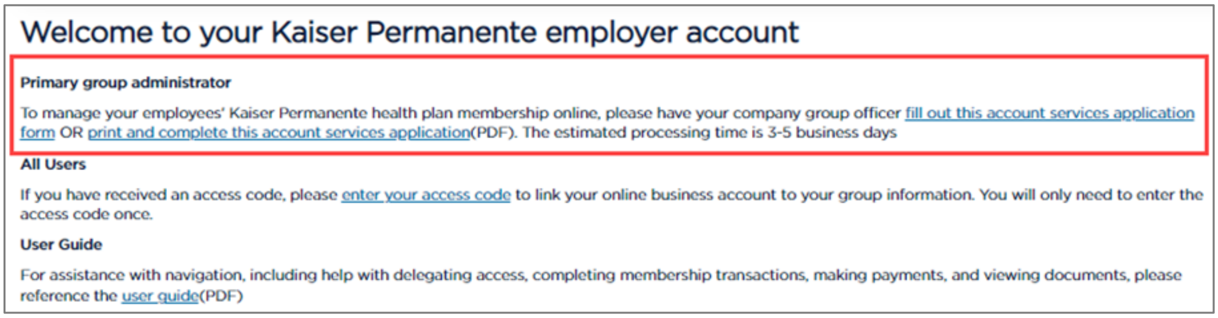
Registering for an Account

1. Go to account.kp.org.
2. Click **Register** (upper right).



3. Complete the registration fields to create a user ID and password. Once registration is complete, the homepage will appear stating: "**Success! You've created your account**." Click "**Sign in to your account**" to continue. Please note, at this point the account has been created but still requires further steps to link to your secure group information.

4. Then on the Dashboard, click the link "**fill out this online account services application form**," in the **Primary group administrator** section, and complete the web form. A PDF version of the form is also available online.



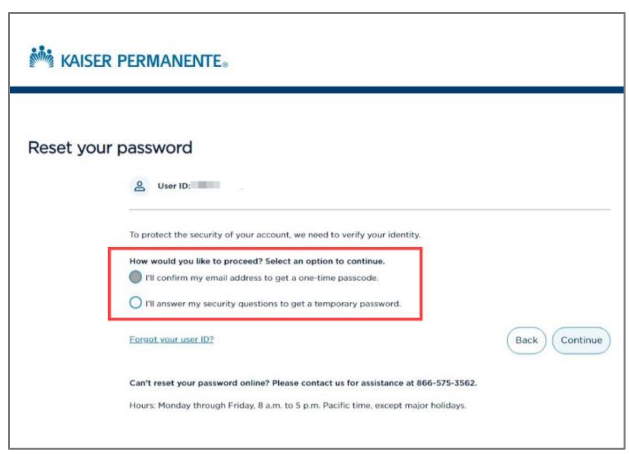
5. A confirmation number will be provided upon submission of the web form. The estimated processing time is 3 to 5 business days.
6. Once the request has been processed, an email notification will be sent to the user with additional sign-on instructions.

Signing into your account

1. Go to account.kp.org.
2. Click **Sign in** to navigate to the log in screen for your secure account.
3. Enter your User ID, your password and click **Sign in**.

Resetting your account password

1. Go to account.kp.org.
2. Click **Sign in**.
3. Click **Forgot your password?**
4. Enter your **User ID** and click **Continue**.
5. Select an option to use the one-time passcode or security questions method and click **Continue**.
6. Sign in using the temporary password you received by email and follow the prompts to create a new password for your account.



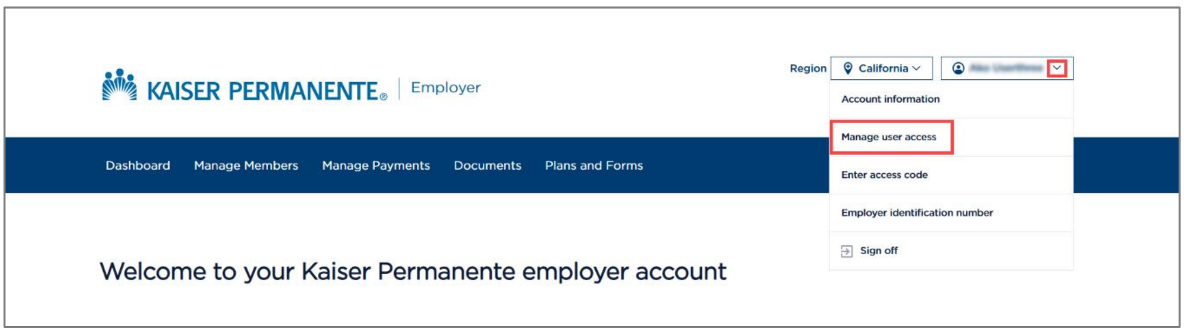
Managing Account Access

The Primary Group Administrator (PGA) is in charge of monitoring, delegating, and updating user access to group information. We recommend auditing your user list at least every six months to ensure that roles stay current.

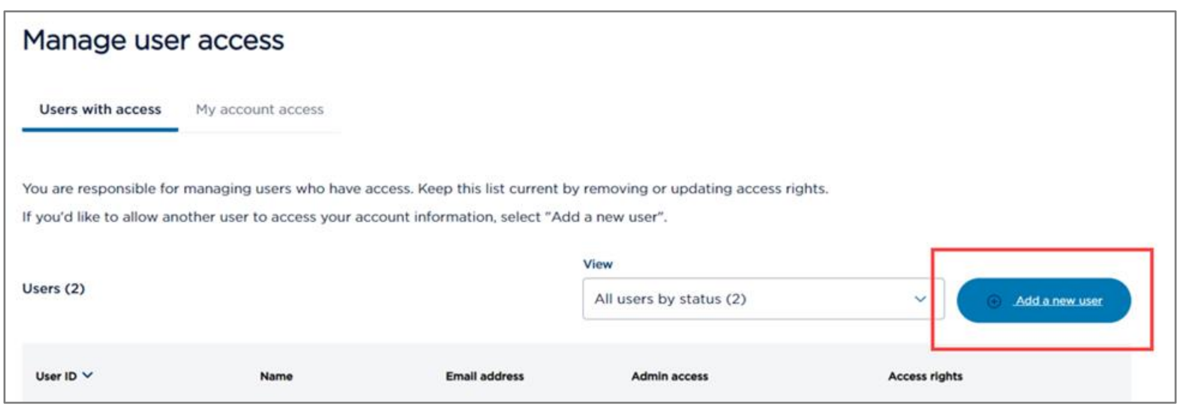
Brokers are granted access to their assigned groups without requiring delegation by the PGA. As of 2022, brokers have some additional capabilities in managing their accounts. Brokers/agents, please refer to the Broker Supplement for more details.

Adding a Secondary User

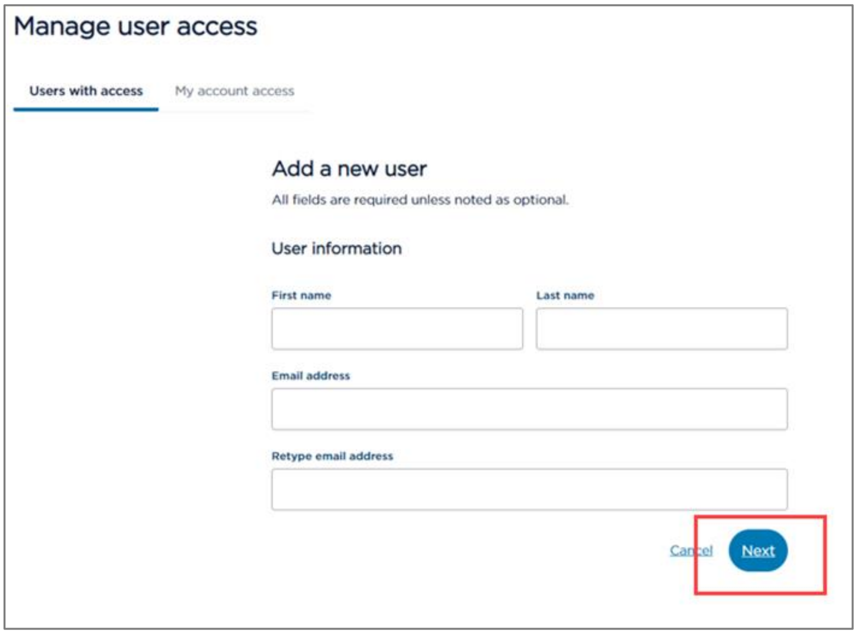
1. The Primary Group Administrator signs in on account.kp.org.
2. Click on the account utility menu in the top right.
3. Select **Manage user access**.



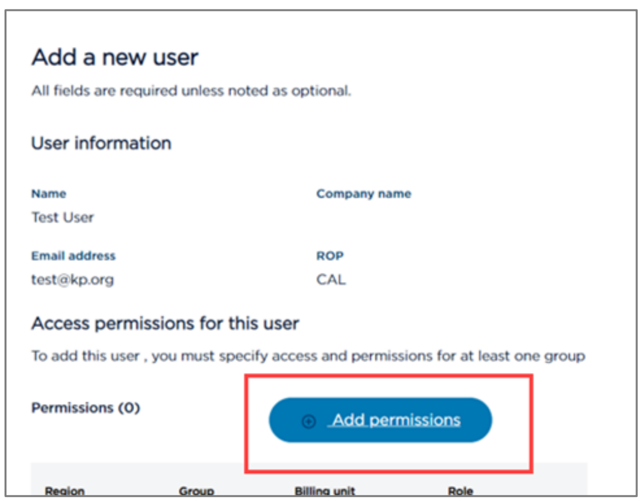
4. Click **Add a new user**.



5. Enter the secondary user information and click **Next.**

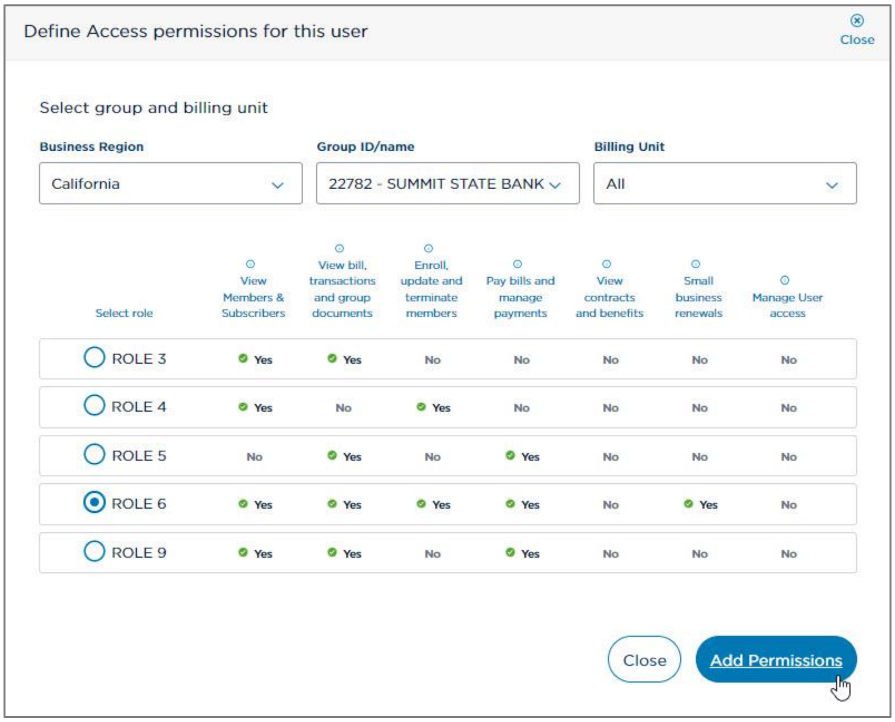


6. Click **Add permissions**

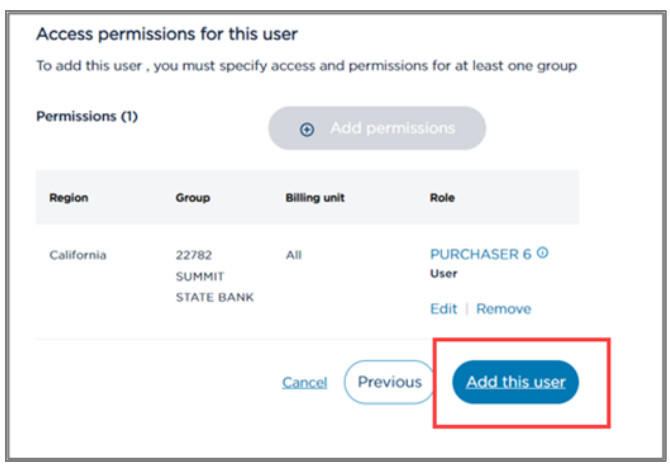


7. In the **Define access permissions for this user** pop-up screen, you may select the appropriate billing unit or leave the default '**All** ' selected to give access to all billing units. Then select the level of access to be given.

8. Click **Add permissions**.



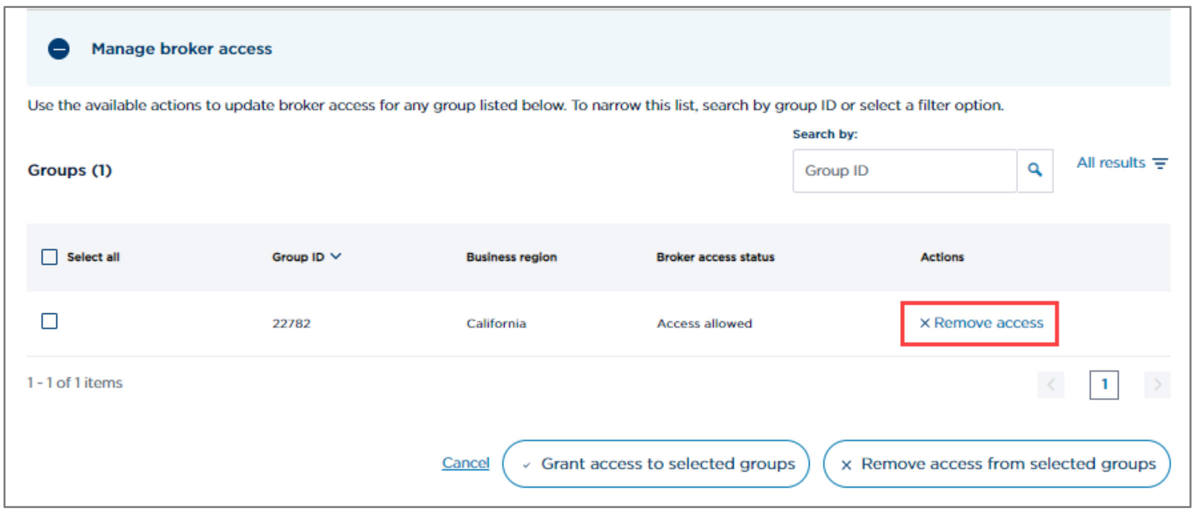
9. Click **Add this user.**



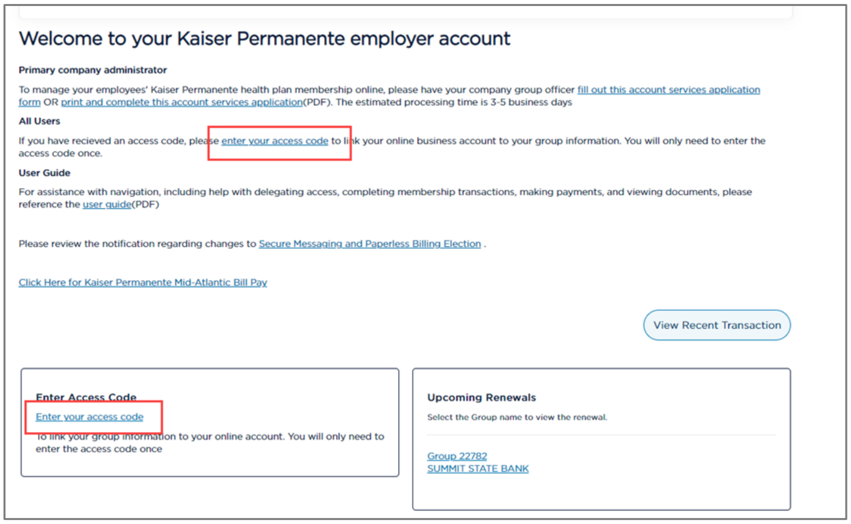
Once the Primary Group Administrator has added the additional user, the new user will receive an automated email with an access code included. The new user will need to create a username and password, log in, and enter the access code on the **Dashboard** screen (the access code link also appears in the account utility menu, and **My account access** page of **Manage user access**).

Please note, group-appointed brokers will be given Purchaser(Role) 6 access to their groups without requiring delegation by the Primary Group Administrator.

PGAs also have the enhanced capability to manage broker access to their online account using the **Manage broker access** section on the **Manage Users** page.

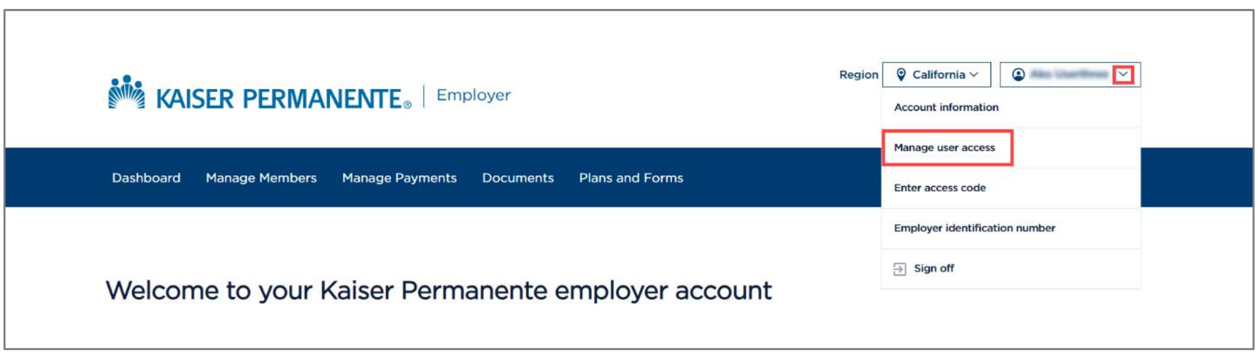


IMPORTANT: We recommend giving new users a heads up to watch for the access code email, and to be sure that they log into the **employer** side of the site to complete the process.

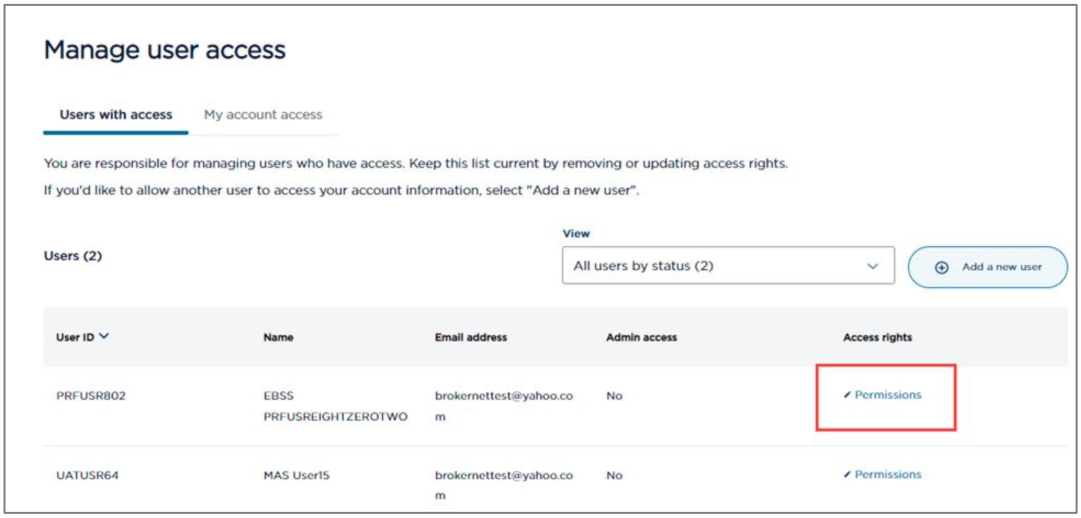


Modifying a Secondary User's Access

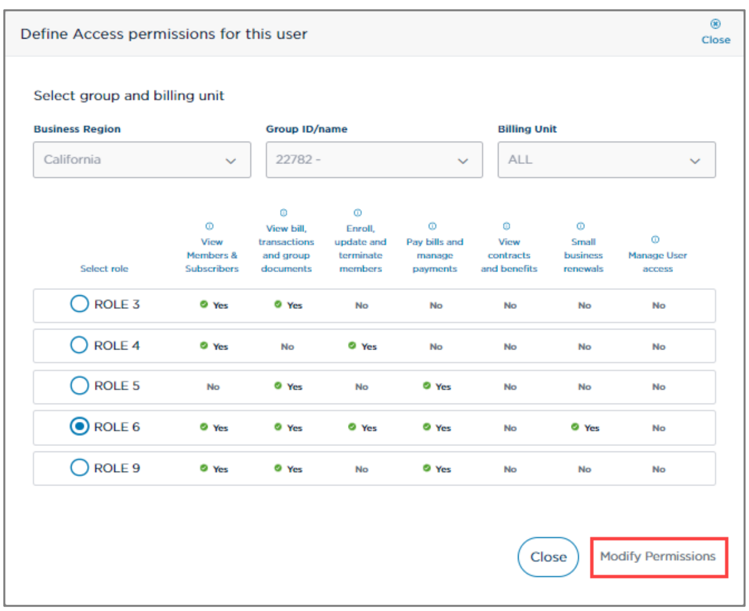
1. Click on the account utility menu in the top right and select **Manage user access**.



2. The Primary Group Administrator will see a list of active users under the **Users with access** section. Please note that users will not appear on the list until they have activated their access code.
3. Click **Permissions** in the **Access rights** column to display the user's access. The user's current access level will display on the screen.

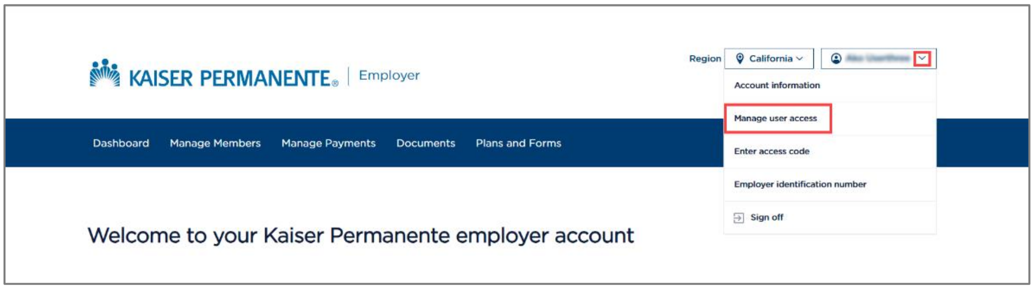


4. Click **Permissions** in the **Access rights** column to display the user's access. The user's current access level will display on the screen.
5. Click **Edit** to update the user's access level.
6. Select the level of access to be given and click **Modify Permissions**.

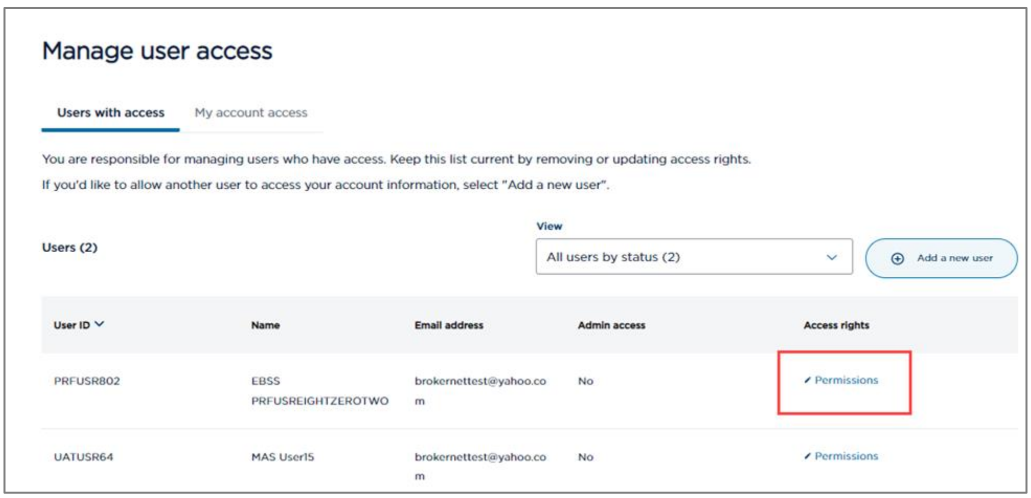


Removing a Secondary User’s Access

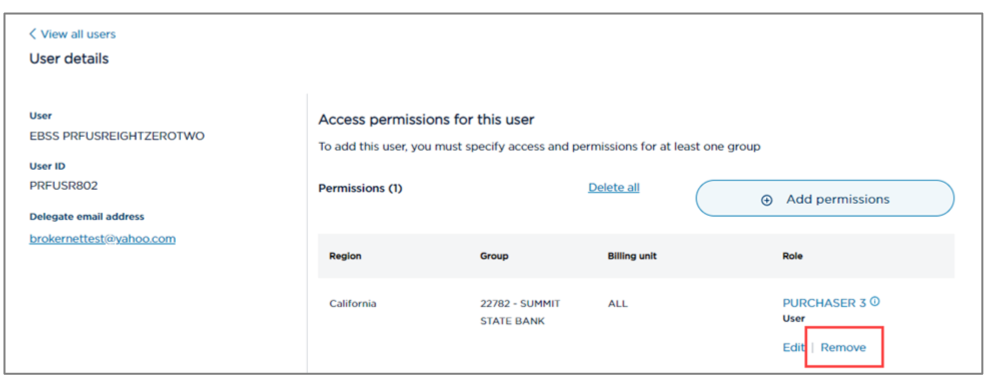
1. Select **Manage user access** from the account utility menu in the top right



2. In the **Users with access** tab, click **Permissions** under the **Access rights** column.



3. Under the **Role** column, click **Remove** to remove the user’s access. Please note, to remove the user’s access to only certain groups/subgroups, click Remove for just the line item(s) corresponding to the groups/subgroup access you want to update.

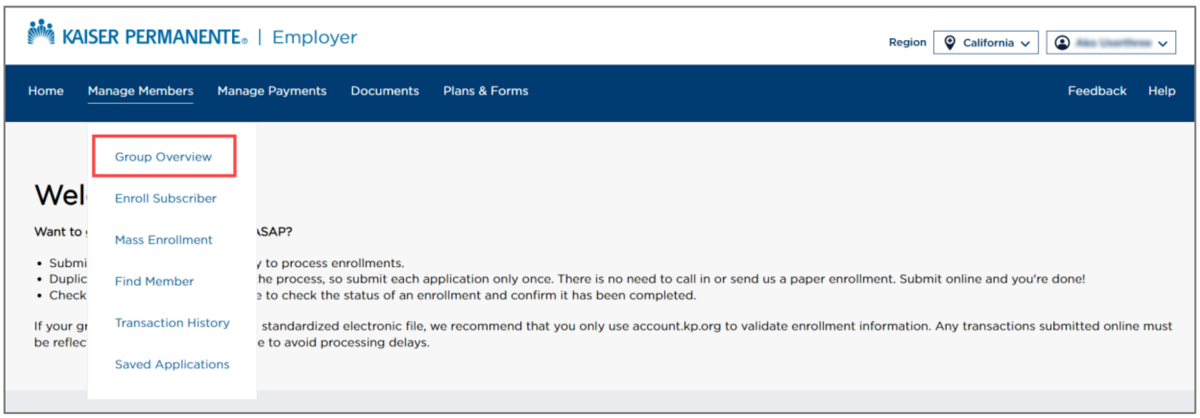


Manage Members

The Manage Members tools support membership transactions such as processing enrollments and terminations, adding family members, and requesting ID cards. Users can track all changes submitted online in Transaction History and download member lists in spreadsheet format for easy billing reconciliation. Check out our Manage Members Overview video to see the benefits of making enrollment changes online.

- Watch the Navigating Manage Members video for a quick tour.

Group Overview



From any screen, users can access the Manage Members dropdown at the top of the page to view groups they have access to by selecting **Group Overview**.

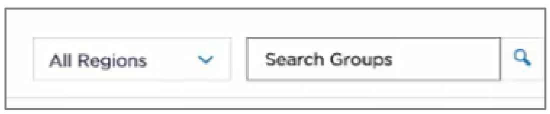
NOTE: Users can click on the buttons next to the Search Groups field to toggle from list (shown below on left) to card view (shown below on the right).

Finding a Specific Group

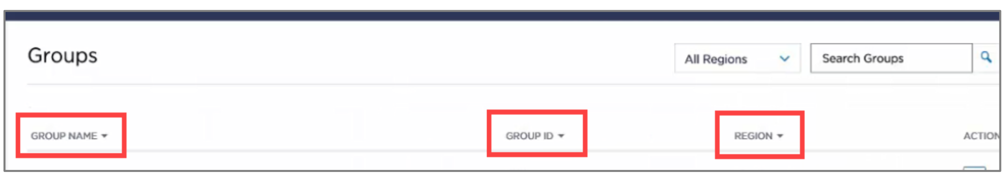
- Watch the [Finding a Group / Subgroup](#) video.

To find a specific group:

1. Navigate to the Group Overview page which lists all the user's groups.
2. Use the Manage Members dropdown menu in the blue header to select **Group Overview**.
3. On the Group Overview page, use the search or filter features to quickly find the group you're looking for.
   - Use the search field to find a group by name or ID number.



   - Use the filters to sort your results by group name, ID number or region.



Inside the Group Overview:

- Subgroups tab – Displays all subgroups/billing units listed under the group
- Members tab – Displays all the members listed under the group. The list contains active, pending and terminated members. (Groups with membership of 2000 and above will see a **Find Members** tab where users can search for a member)
- Billgroups tab – Displays all billgroups listed under the group

Downloading Member Lists

- Watch the [Downloading Member Lists](#) video.

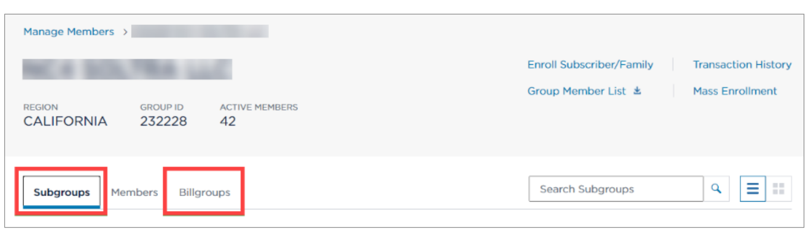
Download a member list at the group, subgroup or billgroup level. The list will be in spreadsheet format for easy sorting, and will contain the following information:

- First Name and Last Name
- Account Role
- Group region
- Group ID, Subgroup ID, and/or Billgroup ID (the list will correspond with the page in which the member list is downloaded)
- DOB
- Gender
- Coverage effective dates
- Subscriber and Member SSN/HRN (SSN/HRNs are available *only* on the downloaded member list. SSN/HRNs are not viewable on the website)

1. Use the Manage Members dropdown in the blue header to visit your group list, then click on the group you're interested in to go to its **Group Page**.
2. Click **Group Member List** in the top-right corner of the page.

3. Click **Download** (or **Request Report** for larger groups) in the popup window.

   NOTE: Member lists are also available at the subgroup or billgroup level. From the Group Detail page, select the subgroup or billgroup you're interested in and then click **Subgroup Member List** or **Billgroup Member List** in the top-right corner of the page. Click **Download/ Request Report** in the pop-up window.



NOTE: How you receive your member report will differ based on the group's membership size.

- Groups with 500 members or fewer – Report will download instantly.
- Groups with 501 - 9,999 members – Clicking **Request Report** will request a report that will appear on the Transaction History page. Typical processing time is 5-10 minutes, but larger groups may take up to 30 minutes.
- Groups with 10,000 or more members – See your account manager or representative for a member list.

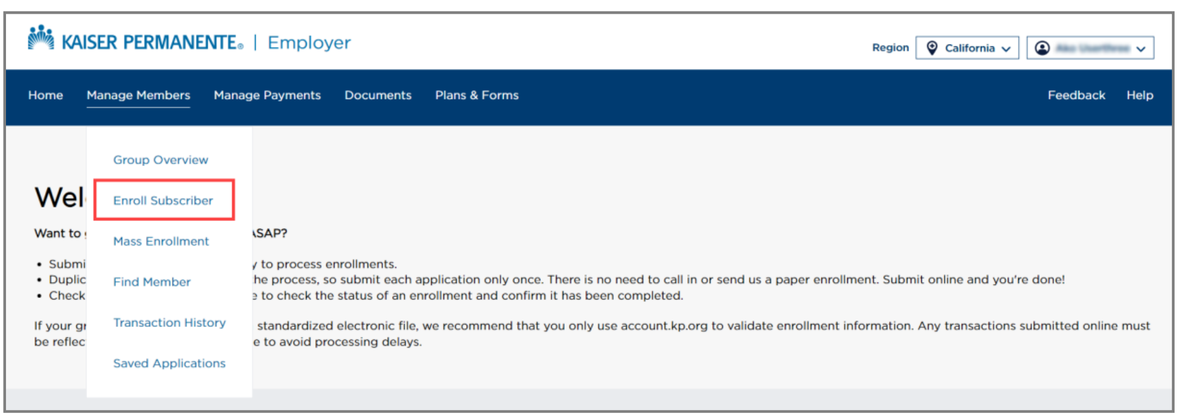
Enrolling a Subscriber (And/or Family Member)

How to add a subscriber and their family members to your group coverage.

- Watch the [Enrolling a Member or Family Member] video.
- Watch the [Uploading a Member Arbitration Agreement] video. *(CA & HI only)*

There are two ways to begin the enrollment process:

Option A. From the Manage Members dropdown in the blue page header, select **Enroll Subscriber**.



Option B. On the Group, Subgroup, or Billgroup list pages, select the unit you want to enroll into, and select **Enroll Subscriber/Family** from the Actions dropdown. The Enroll Subscriber/Family link is also available on the page in the top-right corner of the screen.

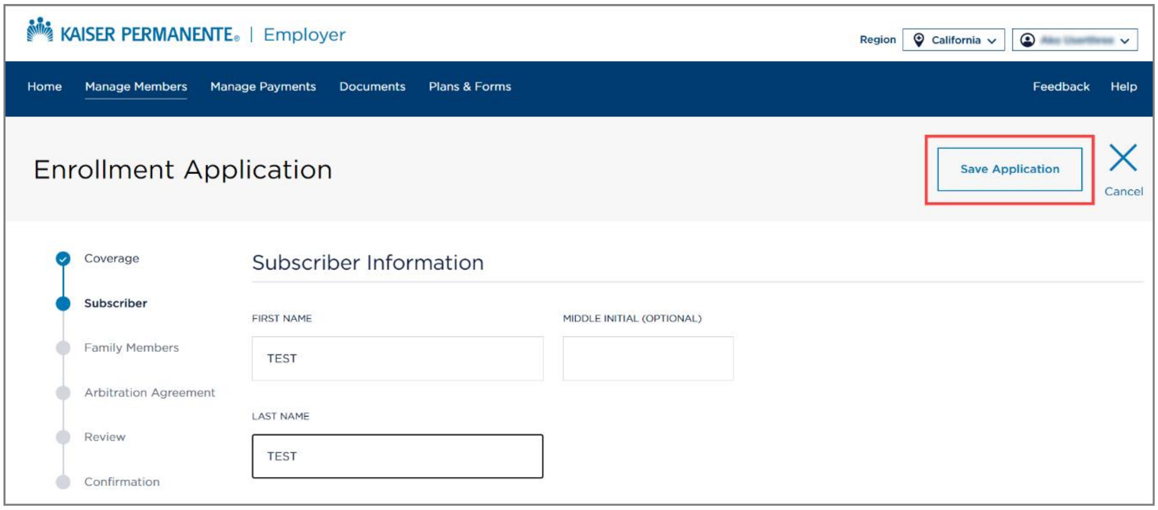
Complete the following information for the subscriber/family:

- For **Coverage**, enter the subscriber's coverage information and click **Next**.
- For **Subscriber**, enter the subscriber's demographic information and click **Next**.
- For **Family Members**, to add Family Members by clicking **Yes** or **No**.
  - If Yes is selected, enter the family members' demographic information and click **Next**. To add additional family members, click **Add Additional Family Member** before clicking **Next.**
  - If No, is selected, click **Next**.
- For **Arbitration Agreement** (CA & HI regions only), select **Maintain Agreement** or **Upload Agreement** to upload a paper copy and click **Next**.
- Review the application once entry is complete. Click **Edit** in the appropriate section to modify the application. To enroll members, click **Enroll Members**.
- The Confirmation page confirm the enrollment was submitted successfully. A confirmation ID will be provided.

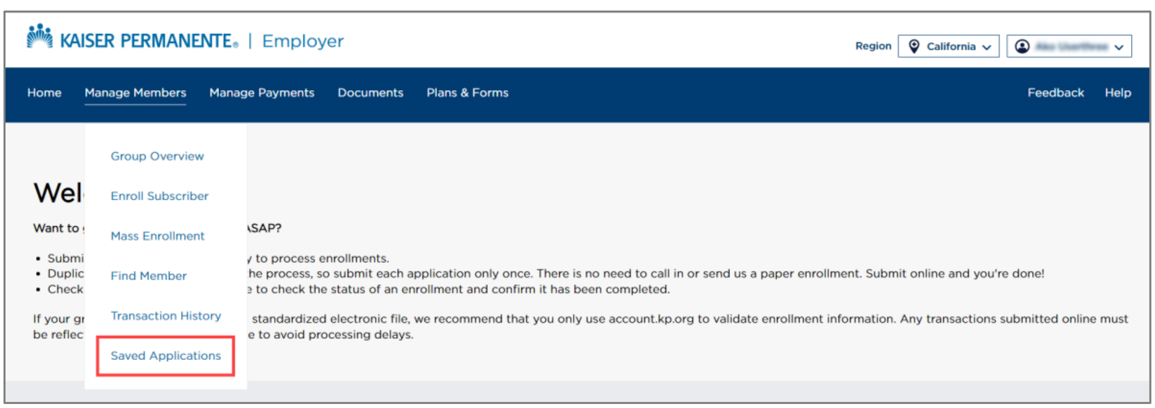
Saving an Enrollment Application

The Saved Application feature allows you to save an enrollment application for completion at a later time. Saved applications are retained for 30 days.

1. Once you have completed the first step in the enrollment application, the Save Application button will appear in the top-right corner of the screen.
2. Click Save Application to save your progress on this application for 30 days.



3. To start working on saved applications again, click **Saved Applications** from the Manage Members dropdown. Selecting the Saved Applications menu item will present a list view of any saved enrollment forms in progress.

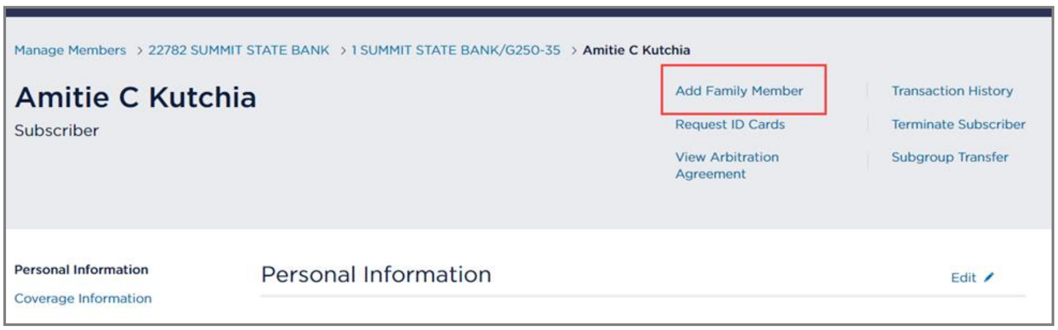


Adding Family Member to an Existing Subscriber Account

- Watch the [Enrolling a Member or Family Member]video.

To add a family member after the initial subscriber is already enrolled by:

1. Locate the existing subscriber using the Find Member option in the Manage Members dropdown menu.
2. Click the subscriber's name to access the member's detail page displaying Personal and Coverage Information.
3. Click **Add Family Member** in top-right corner of the screen.



4. Complete the family member information and click **Submit.**

   NOTE: You can also add family members from the Members tab on group or subgroup pages. Find the applicable subscriber's name, then select **Add Family Member** from the Actions dropdown menu**.** Complete the family member information and click **Submit**.

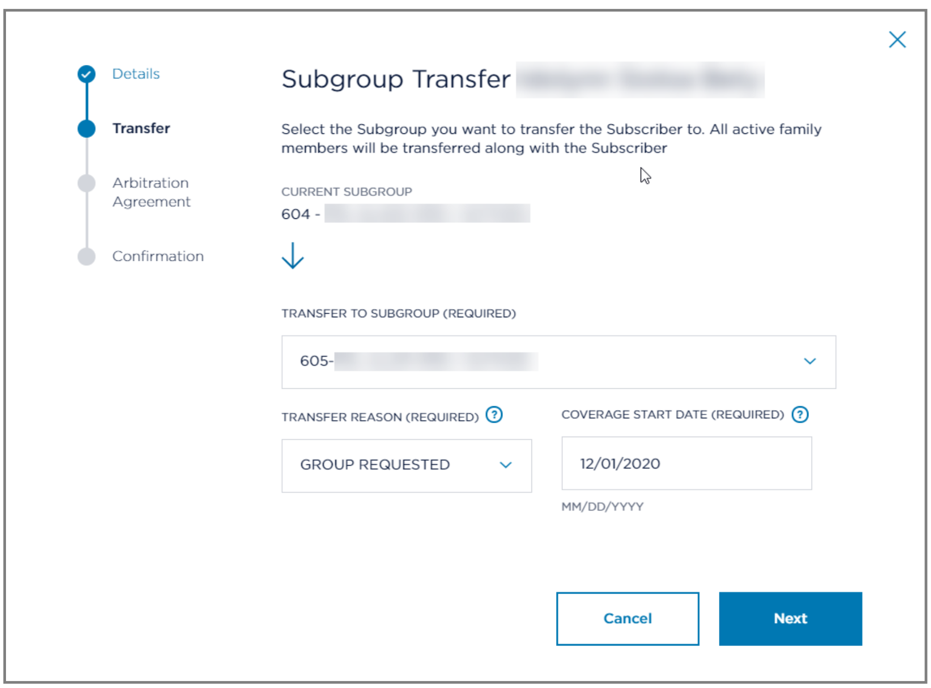
Transferring members to another subgroup

Move a member from one plan (subgroup) to another, without having to terminate and re-enroll. You can only transfer at the subscriber level and any associated family members will change plans automatically. Contract rules apply to subgroup transfers, so be aware of the allowable retroactivity timeframe when making changes with a past effective date.

- Watch the Transferring Members Between Subgroups video.

To transfer a member from one subgroup into another:

1. Find the subscriber you'd like to transfer by using the Find Member option in the Manage Members dropdown menu, or selecting them from the Member tab on the Group page.
2. Once you locate the subscriber, select Subgroup Transfer by doing one of the following:
   Option A. Click on the Action Menu next to the subscriber's name and selecting the **Subgroup Transfer** option.
   Option B. Click the member's name to go their Member page and clicking the **Subgroup Transfer** link in the top right of the page.
3. The Subgroup Transfer pop up screen will display the **Details** page. Review the information to confirm this is the correct member and click **Next**.
4. Select the subgroup the member is moving to in the **Transfer to Subgroup** dropdown menu. The **Transfer Reason** will automatically fill in as "Group Requested."



5. Enter the member's **Coverage Start Date** for the new subgroup. Click **Next**.
6. <u>In California and Hawaii only</u>, you will need to have Member Arbitration Agreement on file. If you have one, click **Maintain Agreement**. If not, you will need to **Upload** an agreement here to continue.
7. Read the terms, click the checkbox to confirm you understand, then click **Transfer**.
8. You will receive a **Confirmation ID** on the last screen which you can use to track the status of your transfer request on the Transaction History screen. Once the request has been processed successfully, the status will read **Completed**.

Terminating subscriber coverage

End coverage for a subscriber and/or family member. Note that ending coverage for the subscriber will end coverage for any associated family members as well.

- Watch the [Terminate Member Coverage](#) video.

To stop coverage for a member:

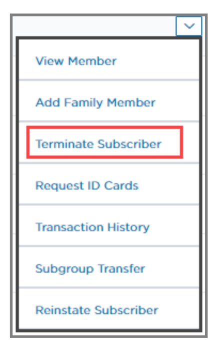
<u>Option A.</u> From any screen, click the Manage Members dropdown at the top of the page and select **Find Member**.

1. Click the subscribers' name to access the member detail screen.
2. Select **Terminate Subscriber** in the menu options located in the top-right corner of the screen.

3. Complete termination reason and effective date and click **Submit.**

<u>Option B.</u> From the group, subgroup, or billgroup pages, click the **Members** tab and locate the applicable person. Use the search or filter tools to help find the member quickly.

1. From the Actions dropdown of the applicable subscriber, select **Terminate Subscriber**.
2. Complete the required fields and click **Submit**.



Reinstating terminated coverage

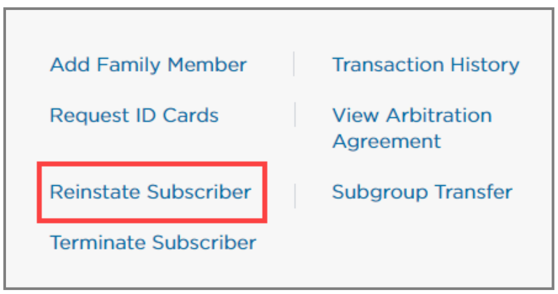
Reactivate a subscriber or family member who had lost coverage, without having to complete the data entry associated with the full re-enrollment process.

- Watch the [Reinstating Members with Terminated Coverage](#) video.

To reinstate a terminated member:

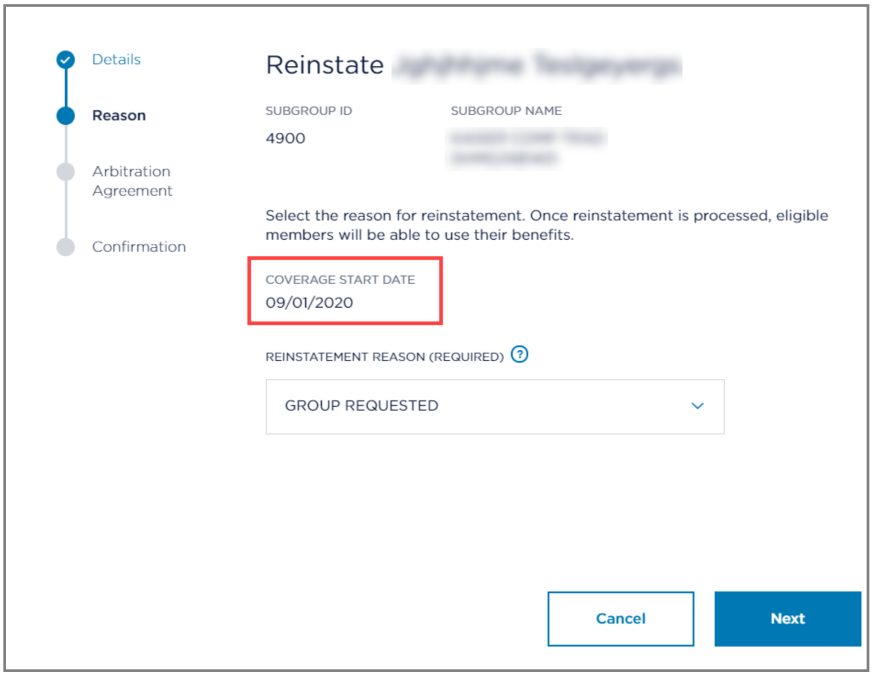
1. Find the member you want to reinstate using the Find Member option in the Manage Members dropdown menu, or select them from the Member tab on the Group page.
2. Once you find the member, select Reinstate a member by doing one of the following:

   Option A. Click the member's name to go their Member page, then click the **Reinstate Subscriber** / **Reinstate Member** link in the top right of the page



   Option B. Click the Action Menu next to the member's name, then select the **Reinstate Subscriber** / **Reinstate Member** option

3. The reinstatement pop up screen will display the **Details** page. Review the information to confirm this is the correct member and click **Next**.
4. The reinstatement will be set to the original **Coverage Start Date** and the reinstatement reason should be prefilled as Group Requested. Click **Next**.



NOTE: If a different date is needed, the user must follow the enrollment process instead.

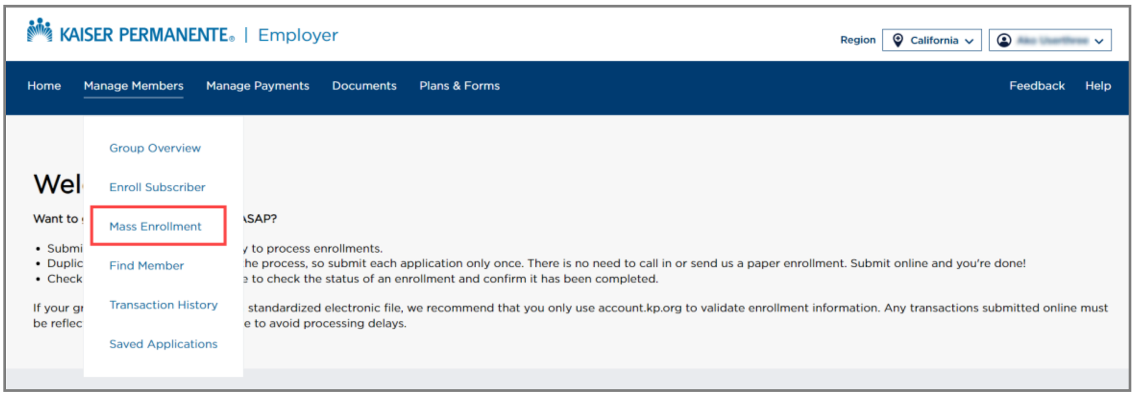
5. In California and Hawaii only, you will need to have Member Arbitration Agreement on file. If you have one, click **Maintain Agreement**. If not, you will need to **Upload** an agreement here to continue.
6. Read the Terms shown, using the scroll bar on the right. Click the checkbox stating your understanding of the terms and click **Submit**.
7. You will receive a **Confirmation ID** on the last screen which you can use to track the status of your reinstatement request on the Transaction History screen. Once the request has been processed successfully, the status will read **Completed**.

Enrolling multiple members at once

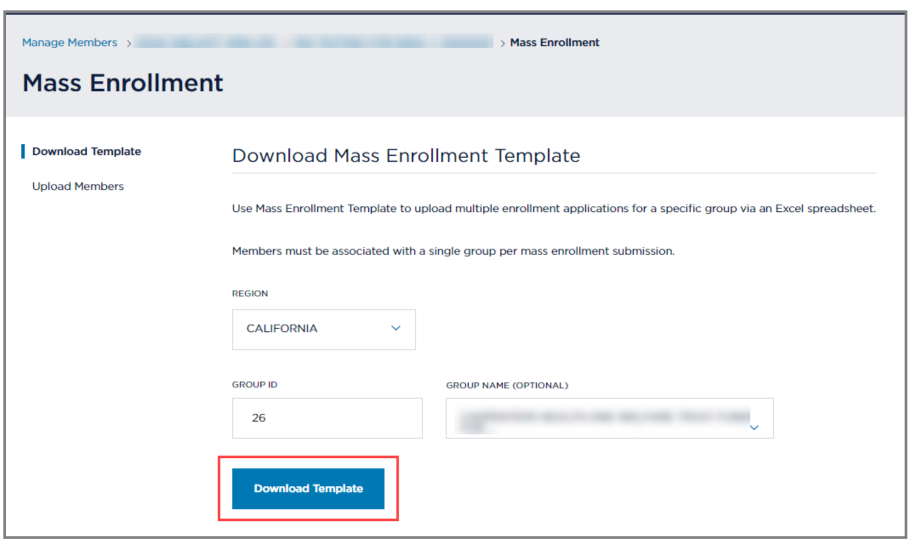
Use the specially formatted Mass Enrollment spreadsheet to fill in multiple applications simultaneously. Review individual applications as needed or submit them all with one click. Note as of the beginning of August 2021, there is no longer a limit to how many files you can upload within a 24-hour period. Each file must still have a maximum of 250 members per group when using the Mass Enrollment feature.

- Watch the [Enrolling Multiple Members at Once](#) video.

1. Click **Manage Members** at the top of any screen and click **Mass Enrollment**.

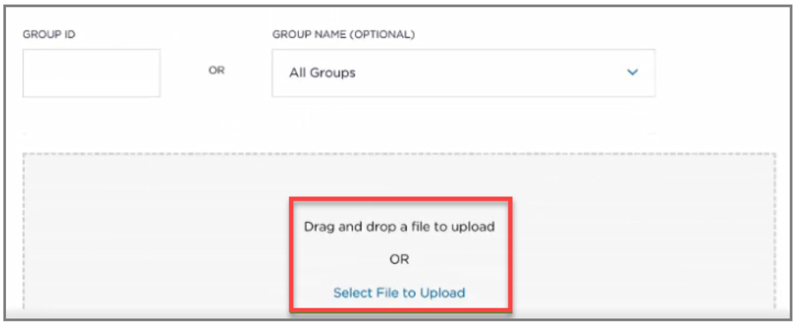


2. Enter the Region and Group ID, then click **Download Template** to download a customized spreadsheet template.

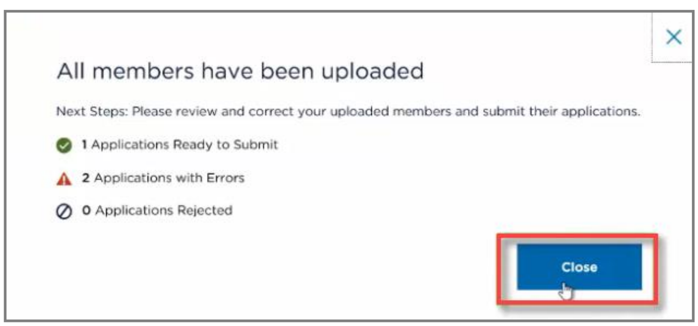


3. Complete the spreadsheet in Excel as directed. Just fill in member data; please do not modify the spreadsheet in any other way or the automatic upload will not work. If you need additional information about completing the spreadsheet, see the instruction tab included within the template.

4. Return to the Mass Enrollment screen once the spreadsheet is complete. Select the region and group ID, then drag and drop the Excel file or click **Select File to Upload** to upload the spreadsheet.



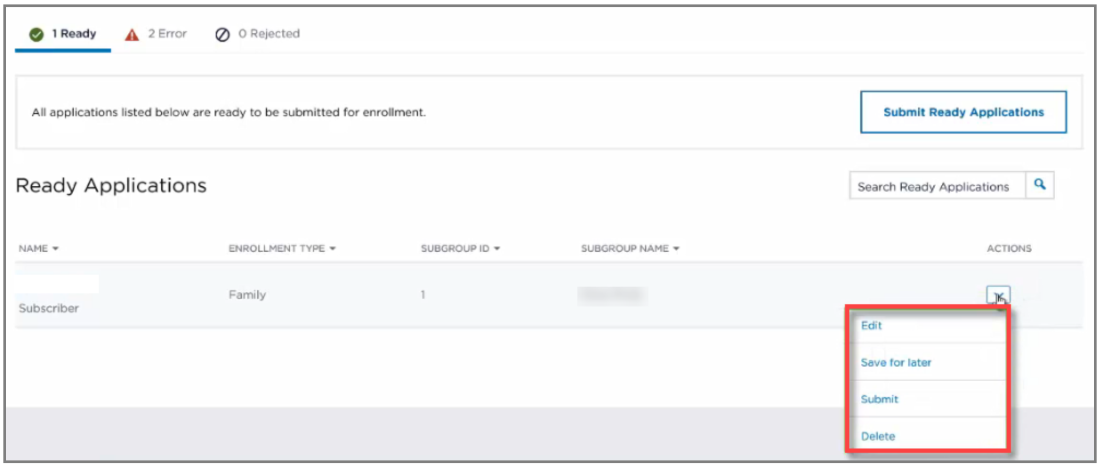
5. Click **Upload Members**.
6. When the upload is complete, a popup message will appear indicating how many applications are ready for submission, contain errors, or were rejected. Click **Close** to proceed.



7. Click the tabs at the top of the page to review the submitted applications:

a. **Ready** – The Ready tab will show each application that is ready for submission. Users can review and submit each application individually, or submit all at once by clicking **Submit Ready Applications**.

   i. To review or update an application, click the **Actions** dropdown menu on the right side of the application to Edit, Save for later, Submit, or Delete.



   ii. Once submitted, a message will appear showing the number of applications that have been submitted successfully. A Confirmation ID is assigned to each application for tracking purposes and can be reviewed on the Transaction History page.

b. **Error** – The Error tab will show a list of applications that contain errors.

   i. To discard all applications that errored out, click **Delete All Error Applications**.

   ii. To fix errors, click the Actions dropdown on the right side of the application and click **Edit** to make changes and then click **Submit Application**, or **Save for later** to make corrections later.

c. **Rejected** – The Rejected tab will show a list of applications that cannot be accepted. Most applications are rejected because the member is already enrolled, the subgroup/billgroup ID is invalid, or the user's access does not allow them to modify the group/subgroup/billgroup.

   i. Click the Actions dropdown to delete the application or review rejection reasons.

Find a Member

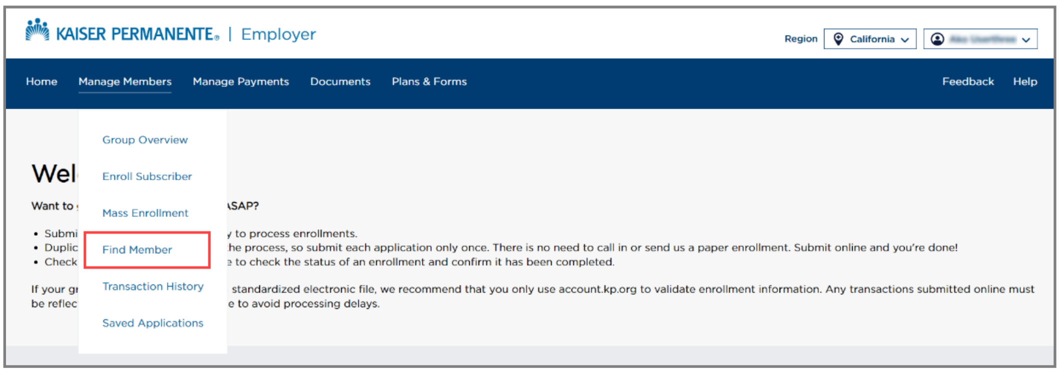
Locate a subscriber or family member from any screen.

- Watch the [Finding a Member](#) video.

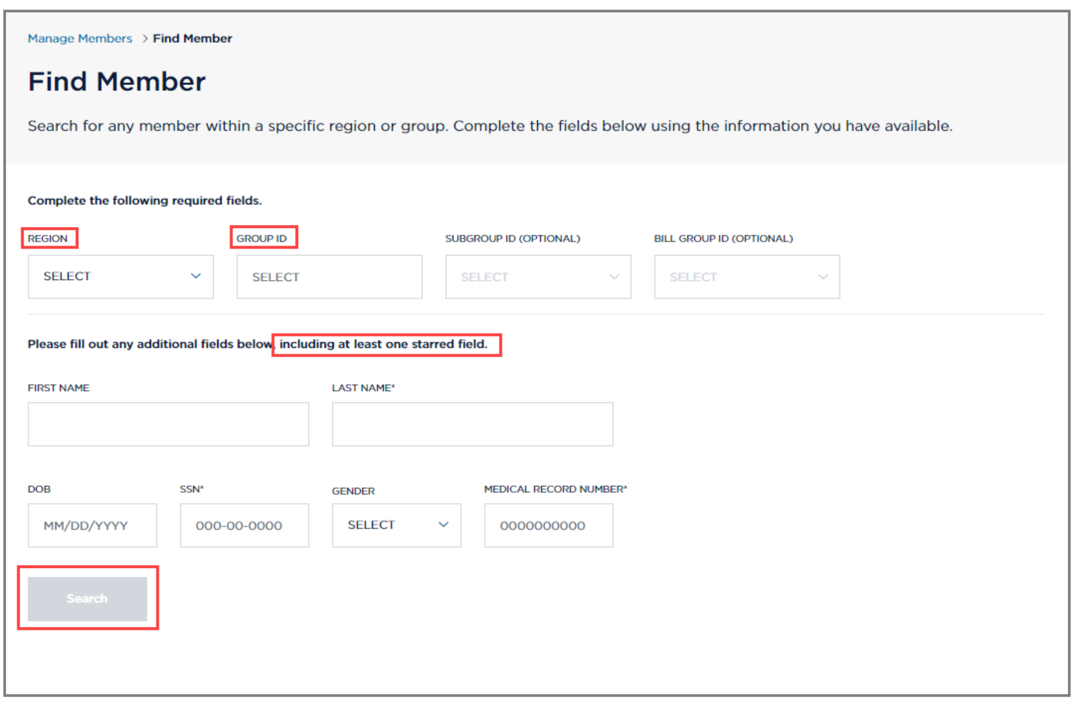
To find a member using the search feature do one of the following:

Option A: To find a member from any page

1. Click the Manage Members menu at the top of the page and select **Find Member**.



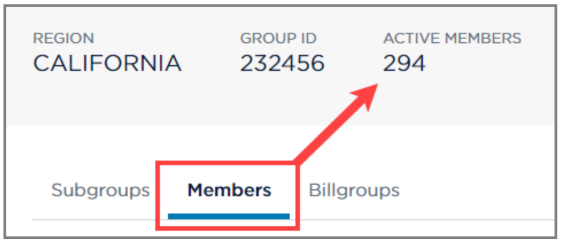
2. Fill in known member information to search for matching records. Start with region and group ID, then complete one or more of the starred fields for the best results.

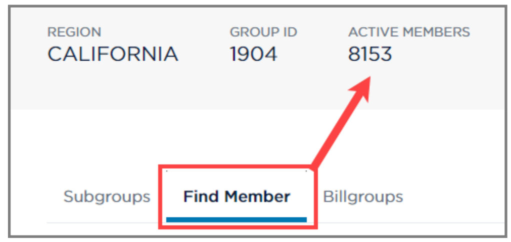


<u>Option B:</u> To **find a member from the Group, Subgroup, or Billgroup pages:**

1. Click the **Members tab** to open a list of subscribers and their family members. The list can be filtered and sorted using the options at the top of the tab.

   NOTE: For groups with more than 2,000 members, the **Find Member** page will display. Using the search feature is faster than displaying and sorting a very long list of members.





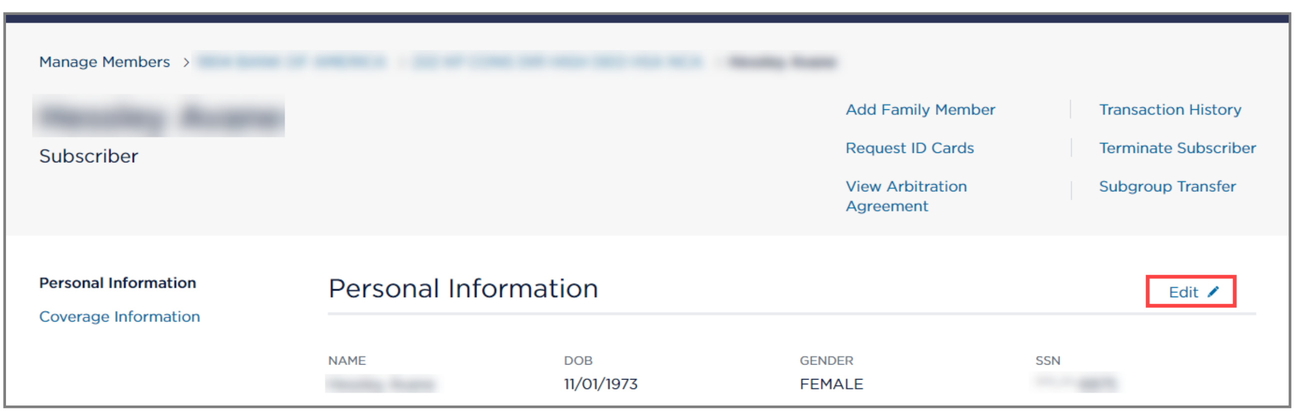
Updating Member Information

Make changes to personal or coverage information from the Member Information page.

- Watch the [Updating Member Information](#) video.

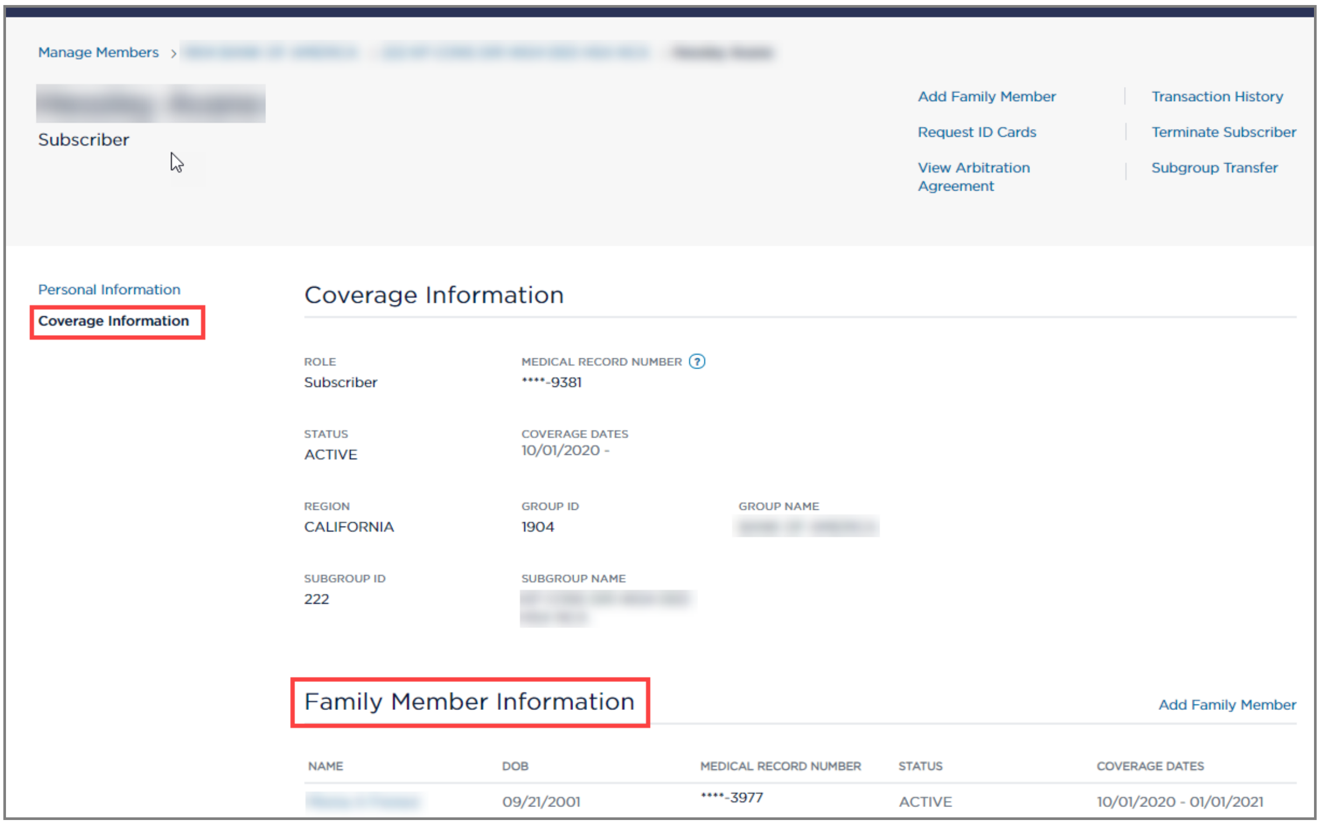
To update the **Personal Information** for a subscriber or family member:

1. Access the member to update by using **Find Member** from the Manage Members dropdown or from the Member List tab on the group, subgroup, or billgroup pages.
2. Click the subscriber's name to display the **Personal Information** screen.
3. Click **Edit** in the top-right corner to update.
4. Update information and click **Submit**.
5. To edit family member information, click **Coverage Information** to access family list of members to edit.



To update the **Coverage Information** for a subscriber or family member:

1. Access the member to update by using **Find Member** from the Manage Members dropdown or from any member list.
2. Click the subscriber's name to display the member detail screen.
3. From the left side of the screen, select **Coverage information**. Users may add additional family members or terminate the member and/or family members from this page.



NOTE: For California, Colorado, Georgia, and Northwest (Oregon / Southwest Washington) regions: The SSN and DOB cannot be updated for members online. Above changes must be submitted to the Membership team for processing. For Hawaii region: Users can only edit the member address online. Any other personal information changes must be submitted to the Membership Team for processing.

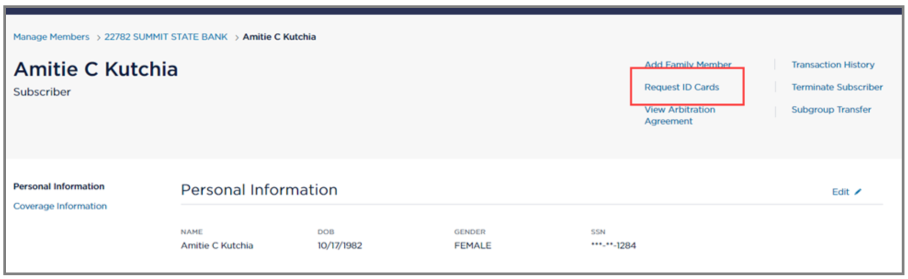
Requesting ID Cards

Order physical ID cards and have them sent directly to the member.

- Watch the [Requesting a Replacement Member ID Card]() video

There are two ways to request an ID:

Option A. From the Manage Members dropdown at the top of the page, select **Find Member** and search for the desired member. On the Member Information screen, click **Request ID Cards** in the top-right corner of the screen.



Option B. The user can also search for a member from the Member List tabs available under the group, subgroup, and billgroup pages. Select **Request ID Cards** from the Actions dropdown on the left side of the row.

NOTE: Members will receive their new ID cards within 7-10 business days.

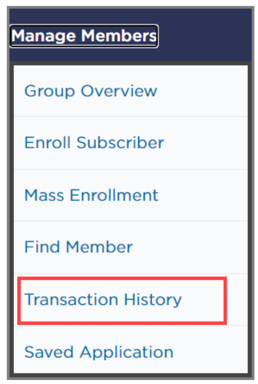
Viewing Transaction History

Displays all changes submitted online.

- Watch the Viewing Transaction History video.

Access the Transaction History page by doing one of the following:

Option A. Select **Transaction History** from the Manage Members dropdown at the top of the page.

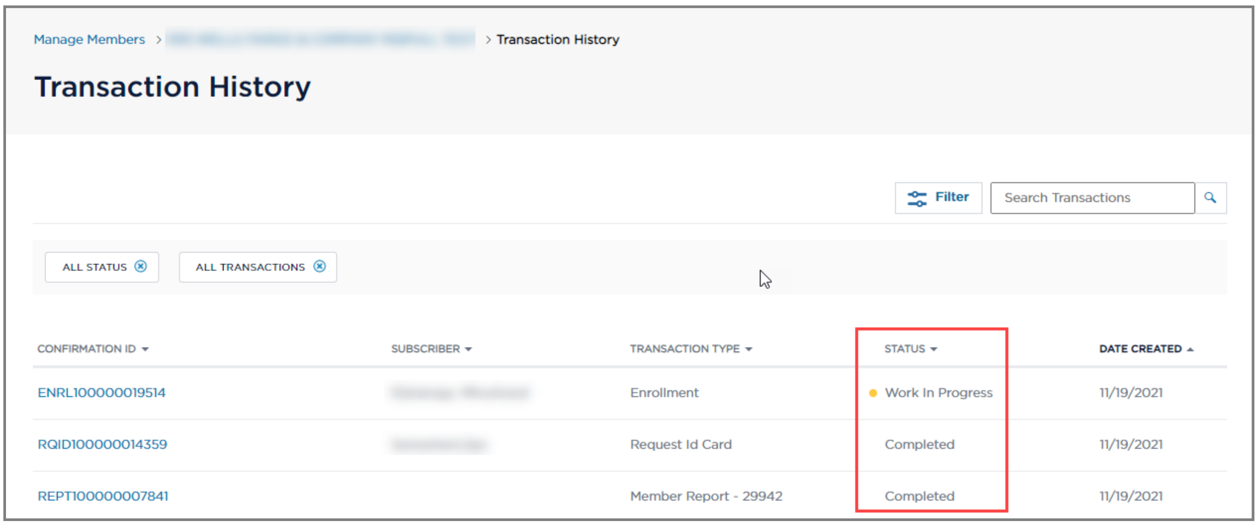


Option B. Use the **Transaction History** short cut on any group, subgroup, billgroup, or member page.

The Transaction History tab will display all transactions submitted online. Note that the display will differ based on how you navigated to this page. If you click through from a subgroup page, for example, you will only see transactions for that particular subgroup.

- Select any transaction to see more details, including when the change was submitted and additional status information.
- Confirmation ID numbers are assigned to every transaction for tracking purposes.

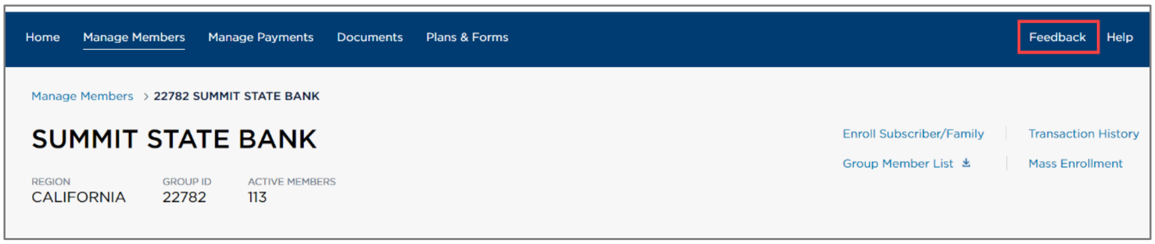
- The Status column will display the status of each transaction.
  - **Completed**: Transactions that are successfully completed and Kaiser Permanente systems are updated accordingly.
  - **Work in Progress**: Transactions submitted to Kaiser Permanente and processing is currently in progress.
  - **Rejected**: Transactions submitted to Kaiser Permanente that are unable to be processed; a representative will contact the group to discuss next steps for processing.



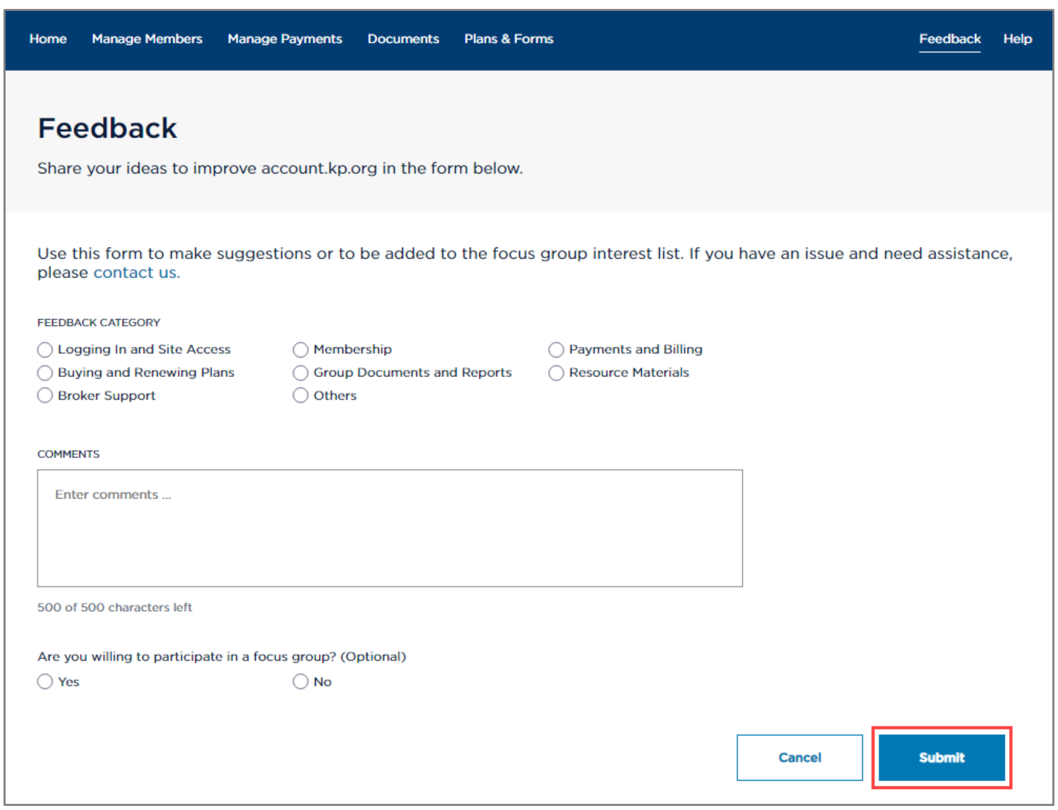
Feedback

The Feedback feature is designed to capture your thoughts on ways we can enhance your user experience on account.kp.org. This allows customers to share ideas for site improvements or new site features, and even sign up for user research interviews.

1. To access the form, click **Feedback** on the header in the top right of the screen.



2. Answer the questions on the Feedback form and click **Submit** to send your responses.

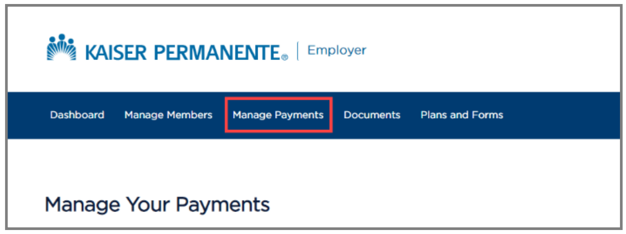


Manage Payments

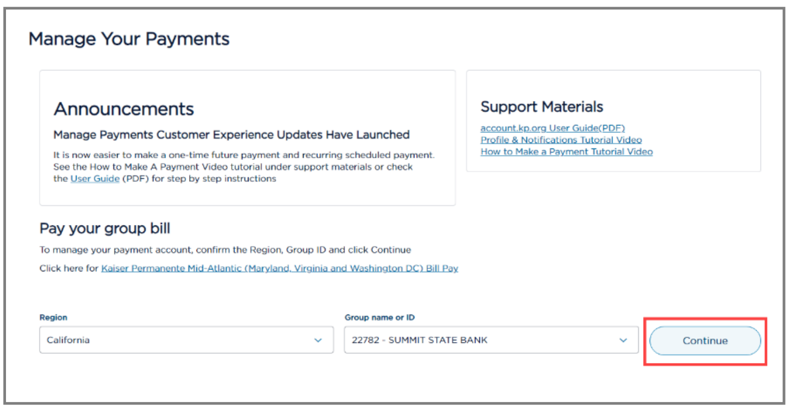
The Manage Payments tab allows users to set up email notifications and review & complete payment transactions, including setting up recurring and one-time payments.

- Watch the [Payer Profile and Notifications](#) video
- Watch the [How to Make a Payment](#) video

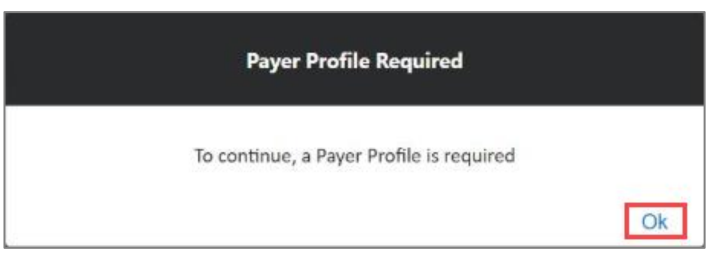
1. Click on Manage Payments.



2. Under Pay your group bill, the Region and Group ID will be pre- populated. If the user has access to multiple regions / groups, a drop-down arrow will display to select a group. Once the region and group name are selected, click **Continue**.



NOTE: The Payer Profile must be set up prior to making a payment. If alerted, click **Ok** to set up the Payer Profile. Once the Payer Profile has been created, the user will not see this alert.

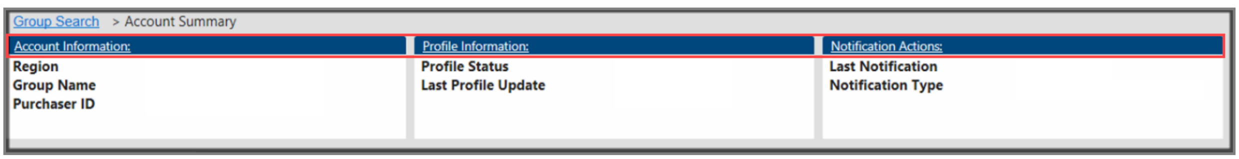


Account Summary

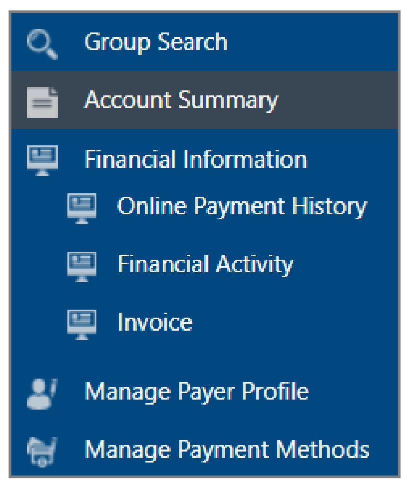
The Account Summary page illustrates billing and payment information for all available Billing Units (BUs) or Billgroups. Account information is listed in the Account Selection table.

Global Menu: The Global Menu will appear at the top of each page within Manage Payments; it contains the Account Information, Profile Information and Notification Actions tabs.

- **Account Information –** Group Region, Name, and Purchaser ID/Group ID
- **Profile Information –** Payer Profile Status and date of the last profile update
- **Notification Actions –** Date and Type of last email notification sent to Group



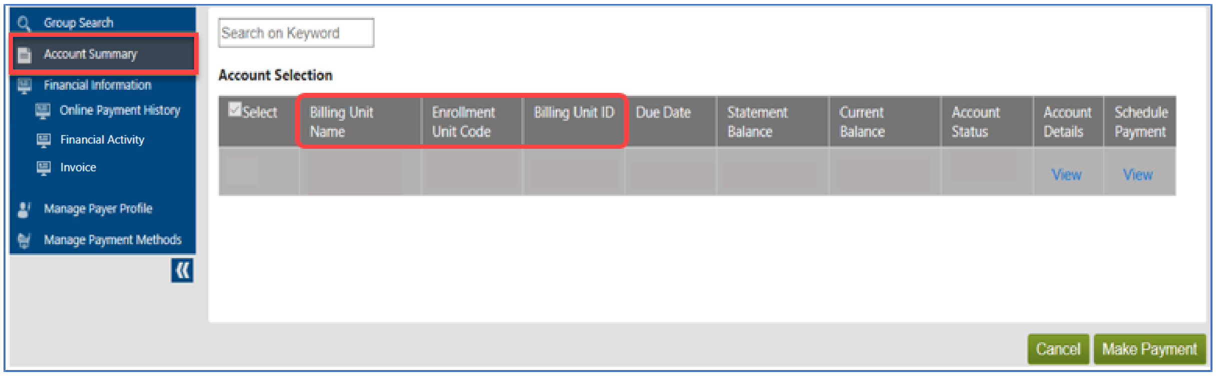
Side Menu: The Side Menu will appear on each page within Manage Payments.



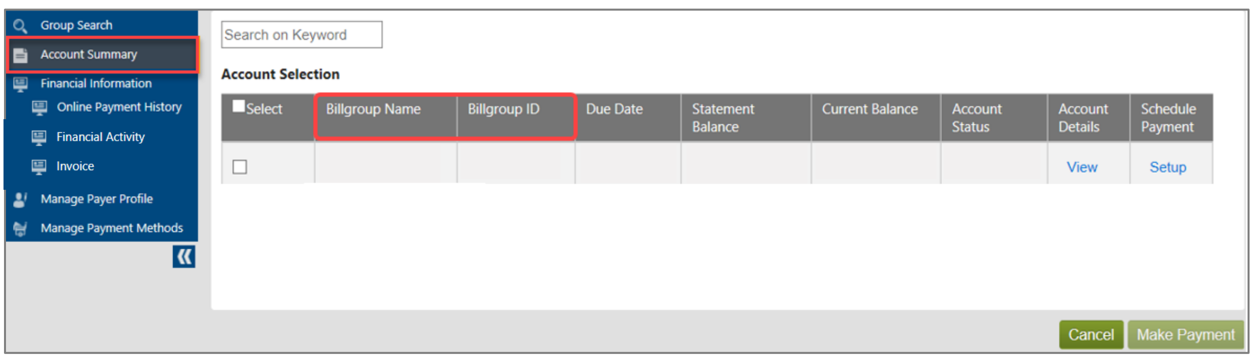
- **Group Search** – Search a different group profile, if applicable
- **Account Summary** – Overview of the account, includes Due Date, Account Status, Statement & Current Balance, Account Details, Schedule Payment and Make Payment options
- **Financial Information –** View billing and payment history for all available Billing Units (includes Online Payment History, Financial Activity and Invoice)
- **Manage Payer Profile –** Update and manage email notifications for E-Receipts, View Bill and Profile updates
- **Manage Payment Methods –** Add or update payment methods

Account Selection Table:

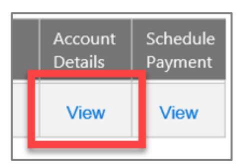
California Group View



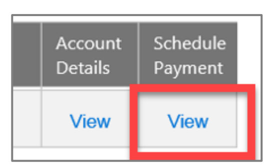
Markets Outside of California Group View



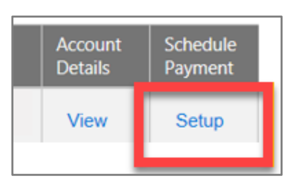
Options included on the Account Summary page:



- **Account Details** – Click **View** to view the account details of the respective account and a snapshot of Future Scheduled Payments and Online Payment History



- **Schedule Payment** – Select **View** or **Setup** to view or schedule a future one-time payment / recurring payments



NOTE: If a Schedule Payment has not been created the user will see Setup and may click on the link to create a scheduled payment.

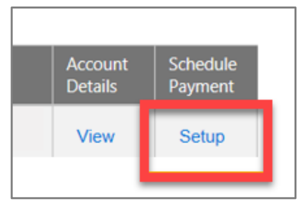
- **Make Payment** – Select to make a real-time payment (same day)

Scheduling Payments (Auto-Pay)

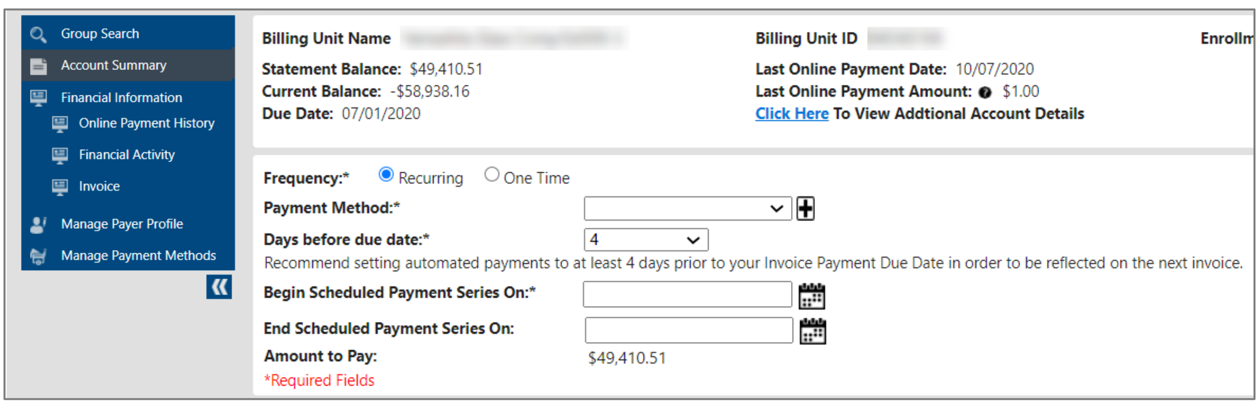
The **Schedule Payment** option allows users to view, edit, or schedule future payments.

Scheduling a Recurring Payment

1. To create recurring payments, click **Setup** under the **Schedule Payment** column for the desired Billing Unit ID.



NOTE: All fields marked with * are required and must be completed to schedule a payment.



2. For **Frequency**, select Recurring.
3. Select a **Payment Method** from the dropdown. If no payment method exists, click on the expansion icon (+) to create a new payment method (see *Manage Payment Methods*).
4. For **Days before due date**, select the number of days prior to the invoice Payment Due Date the scheduled payment should be processed.

   NOTE: We recommend setting automated payments to <u>at least 4 days prior to the invoice Payment Due Date</u> in order to be reflected on the next invoice.

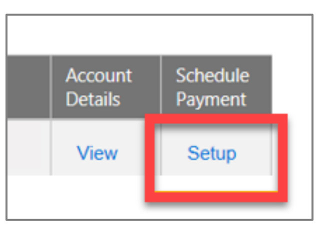
5. For **Begin Scheduled Payment Series On**, enter an effective date for your recurring payment setup.

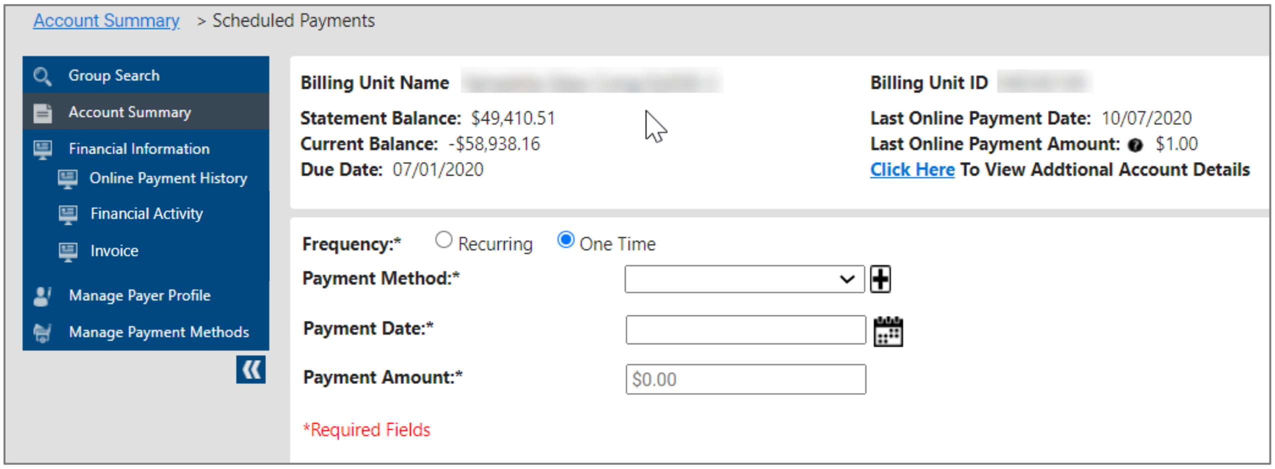
   NOTE: Once a date is entered, a message confirming the next payment processing date will appear in blue on the right side of the screen. The payment processing date is calculated using **Days before due date** as well as **Begin Scheduled Payment Series On**.

6. Optionally, enter a date next to **End Scheduled Payment Series On**, if you want to stop making reoccurring payments on a certain date.
7. **Amount to Pay** will automatically default to the Statement Balance listed on the most recent invoice for the group. <u>The payment amount cannot be modified for recurring payments.</u>
8. Once all information has been updated, read the *Terms and Conditions*. Mark the **Accept Terms and Conditions** box and click **Save.**

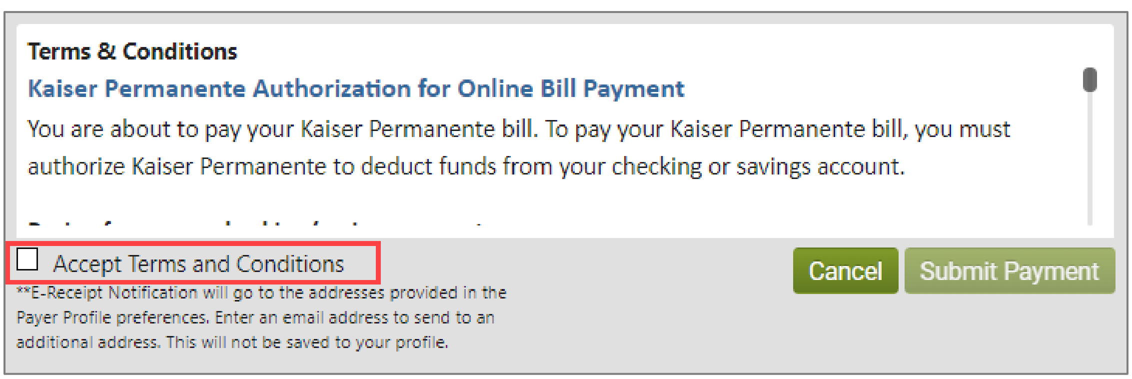
Scheduling a Future One-Time Payment

1. To schedule a future, one-time payment, click **Setup** under the Schedule Payment column for the desired Billing Unit ID.



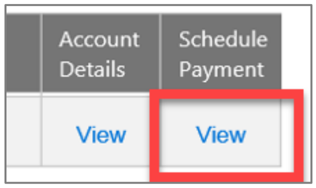


2. Under **Frequency**, select **One Time**.
3. For **Payment Method**, select the method from the dropdown.
4. Enter in the future **Payment Date** and **Payment Amount**.
5. Once all information has been updated, read the *Terms and Conditions* and mark the **Accept Terms and Conditions** checkbox.
6. Click **Submit Payment.**

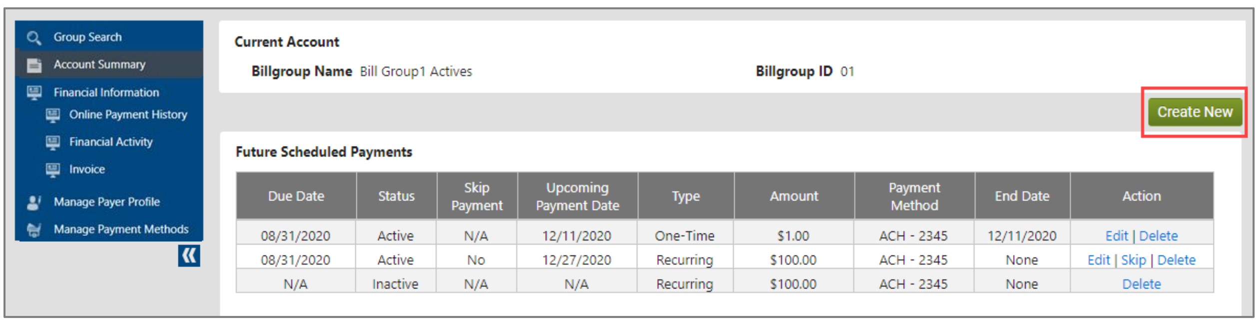


Viewing and Editing Future Scheduled Payments

1. To view a future scheduled payment, click View under the Schedule Payment column for the desired Billing unit ID that has a current payment setup.



2. Future scheduled payments will display all recurring and one-time scheduled payments, whether active or inactive.
    a. Click **Create New** to add an additional payment setup.



Actions available for editing a recurring payment:

- **Skip** – Click to skip the next scheduled recurring payment
- **Delete** – Click to delete a recurring scheduled payment
- **Edit –** Modify the **Payment Method** and/or **End Scheduled Payment Series On**
- **Payment Method –** Select to update the payment method of an existing future payment setup

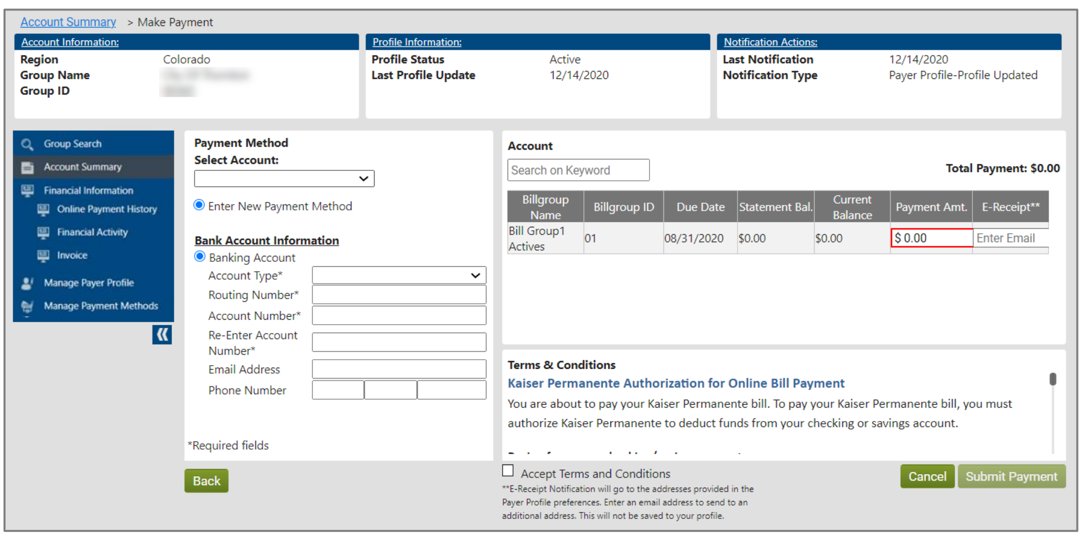
Actions available for editing a one-time payment:

- **Delete** – Click to delete a one-time payment
- **Edit –** Modify the **Payment Method, Payment Date**, and/or **Payment Amount**.

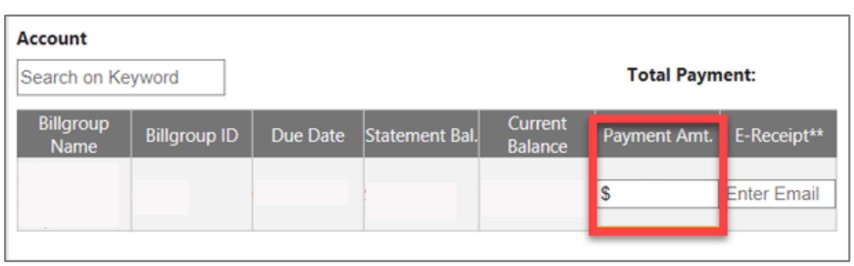
Making a Payment Today

1. To make a single payment today, click **Make Payment**.

2. Under **Payment Method**, select a stored payment method from the **Select Account** dropdown or select the radio button **Enter a New Payment Method** to input a new payment method.

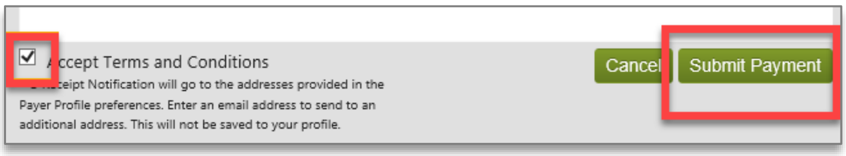


3. Under **Payment Amt.** enter the payment amount for the single payment.

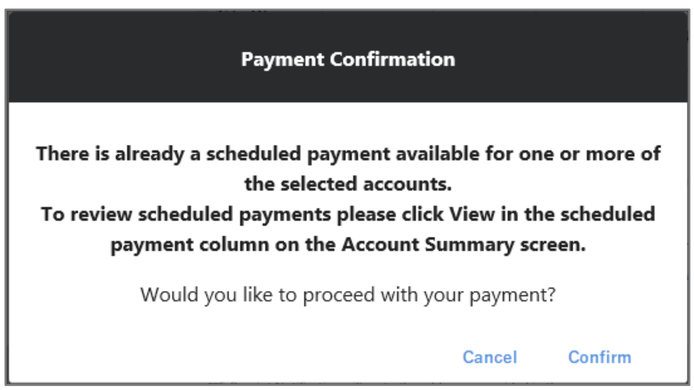


4. Optionally, enter an email address to send an additional **E-Receipt** for the payment (E-Receipts are automatically sent to recipients listed in the Payer Profile).

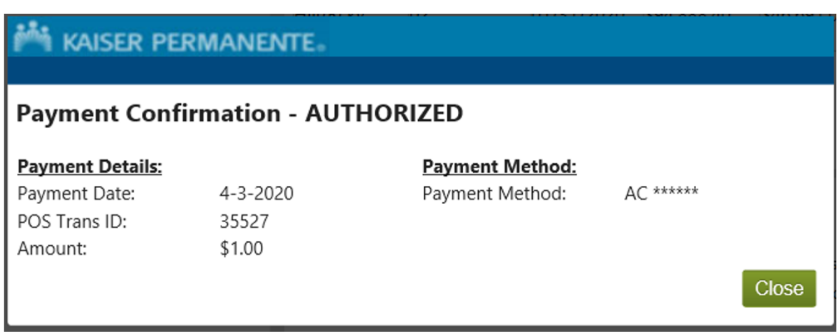
5. Select the **Accept Terms and Conditions** box and click **Submit Payment.**



NOTE: If a scheduled payment is already set up for the account/BU/billgroup, the user will receive the alert pop up below. Select **Confirm** to continue or **Cancel** to cancel the payment.



6. Once the payment has been submitted successfully, the user will receive the message below. Click **Close.**



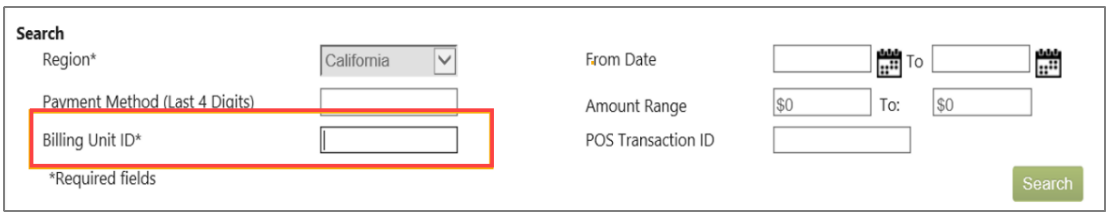
Financial Information

Options within the Financial Information tab allows for users to view group premium invoices and all financial history, including payments made on or offline.

Viewing Online Payment History

The Online Payment History page displays payments processed online. For a listing of all other payments made (e.g. check, ACH, etc.), see *Financial Activity*.

1. Select **Online Payment History** from the side menu bar.
2. Enter the Billing Unit ID/Billgroup ID – Click **Search**. Search results will display.

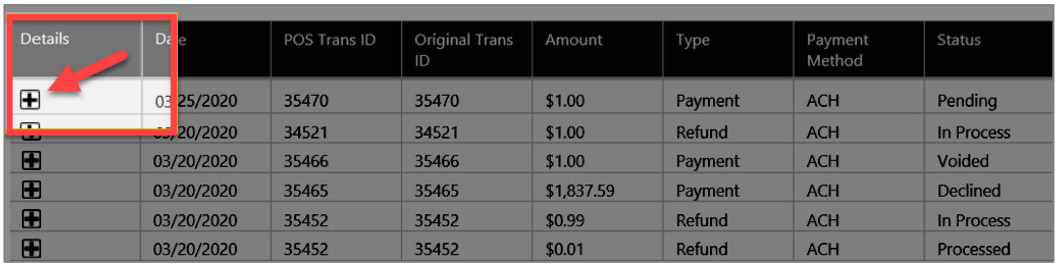


Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status	Action
⊞	03/25/2020	35470	35470	$1.00	Payment	ACH	Pending	Void
⊞	03/20/2020	34521	34521	$1.00	Refund	ACH	In Process	
⊞	03/20/2020	35466	35466	$1.00	Payment	ACH	Voided	
⊞	03/20/2020	35465	35465	$1,837.59	Payment	ACH	Declined	
⊞	03/20/2020	35452	35452	$0.99	Refund	ACH	In Process	
⊞	03/20/2020	35452	35452	$0.01	Refund	ACH	Processed	

Status Legend:

- **Pending** – Payment is authorized and waiting for bank settlement
- **Voided** – Payment is cancelled before bank settlement
- **Declined** – Payment or Refund is declined during authorization
- **Processed Not Completed** – Bank settlement not completed
- **Processed** – Bank settlement is complete
- **Refund Requested** – Refund has been requested for the transaction
- **In Process** – (refund requests only) Refund submitted for processing is in progress
- **Refund Approved** – Refund requested is approved
- **Refund Denied** – Refund requested is denied

3. To view payment details, click the expansion icon (+) within the Details Section.

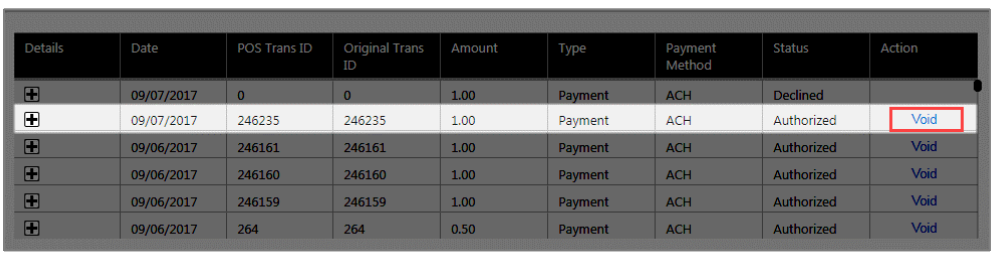


Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status
⊞	03/25/2020	35470	35470	$1.00	Payment	ACH	Pending
⊞	/20/2020	34521	34521	$1.00	Refund	ACH	In Process
⊞	03/20/2020	35466	35466	$1.00	Payment	ACH	Voided
⊞	03/20/2020	35465	35465	$1,837.59	Payment	ACH	Declined
⊞	03/20/2020	35452	35452	$0.99	Refund	ACH	In Process
⊞	03/20/2020	35452	35452	$0.01	Refund	ACH	Processed

Voiding a Payment

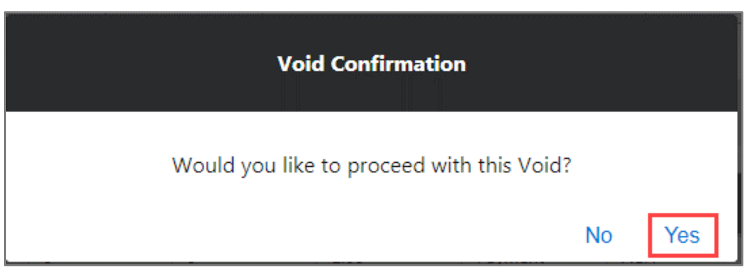
Online payments may be voided same day only if **Void** is indicated in the Action column.

1. At the Online Payment History page, locate the payment and click **Void**.



Details	Date	POS Trans ID	Original Trans ID	Amount	Type	Payment Method	Status	Action
⊞	09/07/2017	0	0	1.00	Payment	ACH	Declined	
⊞	09/07/2017	246235	246235	1.00	Payment	ACH	Authorized	Void
⊞	09/06/2017	246161	246161	1.00	Payment	ACH	Authorized	Void
⊞	09/06/2017	246160	246160	1.00	Payment	ACH	Authorized	Void
⊞	09/06/2017	246159	246159	1.00	Payment	ACH	Authorized	Void
⊞	09/06/2017	264	264	0.50	Payment	ACH	Authorized	Void

2. Click **Yes** on the Void Confirmation window.



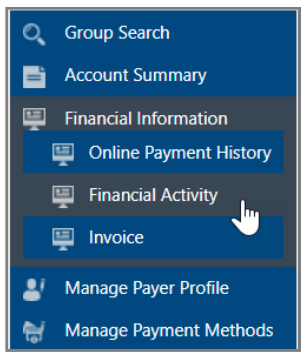
3. A confirmation window will appear, click **Close**.

Financial Activity

Financial Activity allows users to see the date and amount the following financial-related transactions occurred: payment allocations, payment reversals, refunds, current dues, retro dues, discounts, and fees.

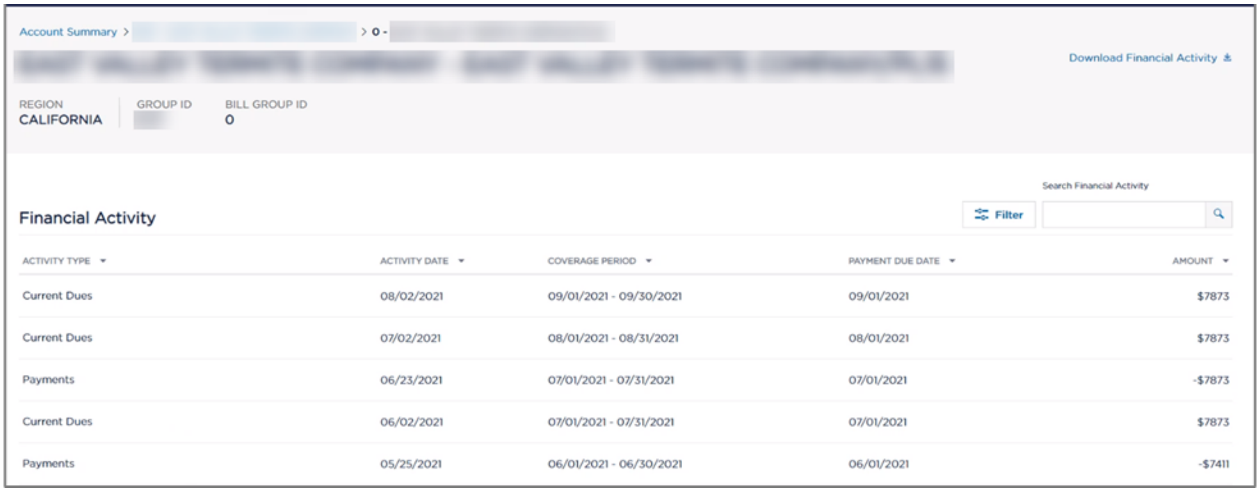
NOTE: For Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington), please refer to the former online experience for this section.

1. To view all payments made other than online payments (e.g., check, ACH, etc.), payment reversals, refunds, current dues, retro dues, discounts, and fees, click **Financial Activity** in the side menu.

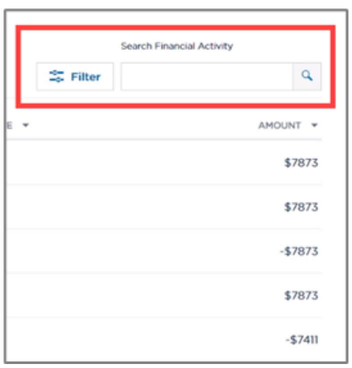


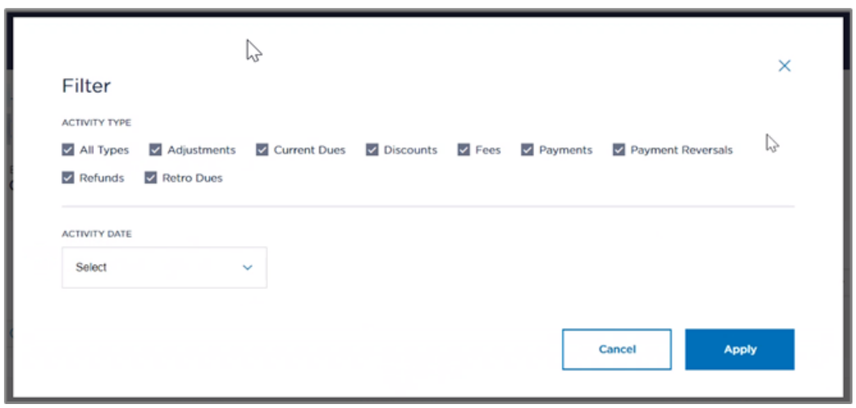
The page will display all billgroups to which you have access. The Group ID and number of active members is shown.

2. By clicking the billgroup name, you can view the group financial activity. Types of financial activity may include payment allocations, payment reversals, refunds, current dues, retro dues, discounts, and fees.



You can also filter based on types of activity by clicking the **Filter** button on the right. Mark all the activity types you want to see and click **Apply**.



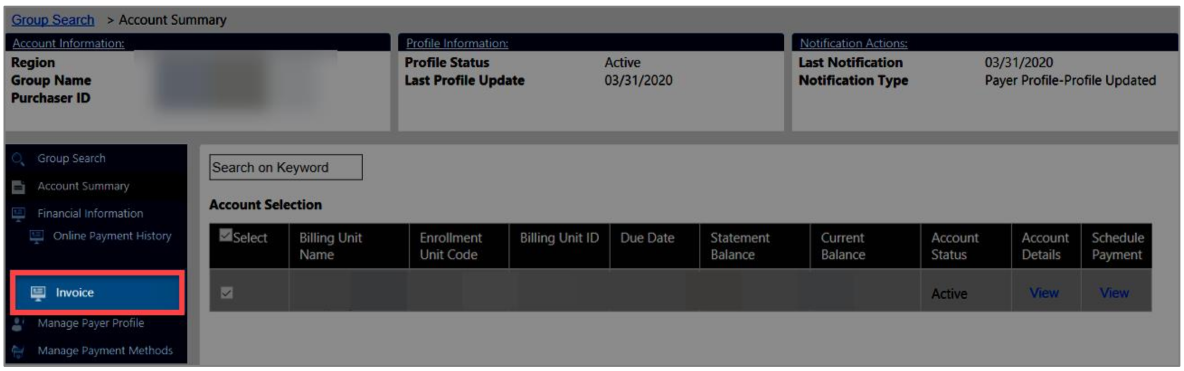


NOTE: Do your screens look *different*? Your group could be on the former online experience.

Invoices

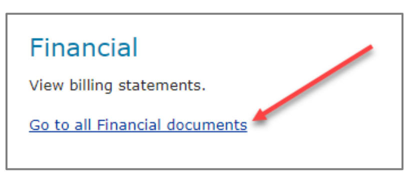
Invoices within a 24-month period may be viewed and printed online. If your group receives a **consolidated invoice** be sure to read this [announcement.](announcement)

1. Within the Financial Information section, click **Invoice**. Invoices can also be accessed by clicking **Documents** in the upper banner, next to Manage Payments.

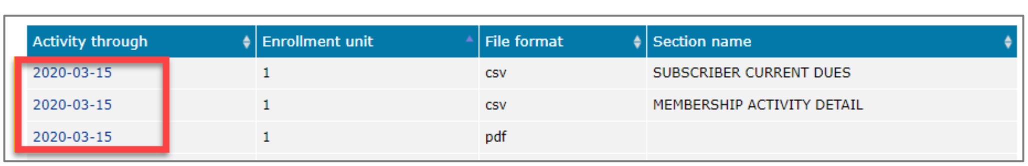


2. Under Group Documents, select **Continue** next to the billing unit name field. For users with access to multiple groups, select the desired billing unit to view and click **Continue.**

3. Under the Financial header, click **Go to all Financial documents.**



4. Invoices are sorted by the year under the **Invoice** dropdown. Under the **Activity through** column, click the date to download the corresponding document.



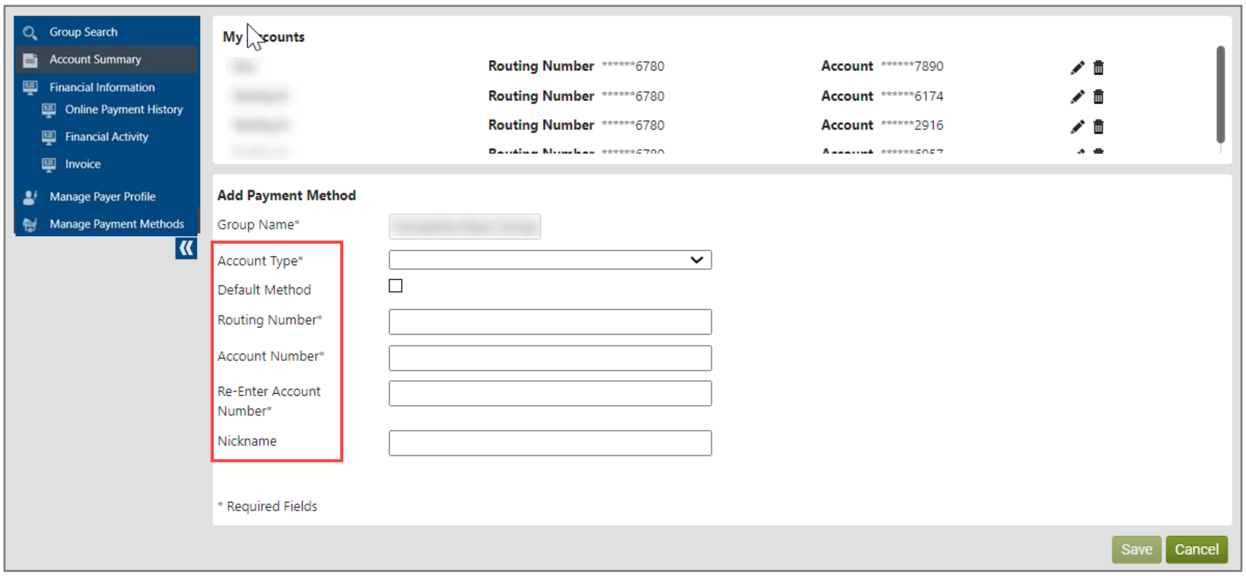
Activity through	Enrollment unit	File format	Section name
2020-03-15	1	csv	SUBSCRIBER CURRENT DUES
2020-03-15	1	csv	MEMBERSHIP ACTIVITY DETAIL
2020-03-15	1	pdf	

Managing Payment Methods

In order to make a payment online, a checking or savings account will need to be set up. Users can manage their payment methods on the Manage Payment Methods page.

Adding a Payment Method

NOTE: <u>Multi-State Consolidated Invoice Customers Only</u>: Making an online payment is only available to region specific customers. Due to your invoice being consolidated, this is not available to you at this time. Stay tuned for future announcements. <u>Please do not make a payment online</u>. You will need to provide remittance instructions with one of the payment methods outlined below.



NOTE: All fields marked with * are required and must be completed to schedule a payment.

1. Select the **Account Type**, Checking or Savings (Credit card payments are not accepted)
    a. If the bank account will be the default payment method, mark the **Default Method** checkbox.
2. Enter the bank **Routing Number**, checking/savings **Account Number**
3. Optionally, the user may give the account a **Nickname**.
4. Click **Save**.

Editing an Existing Payment Method

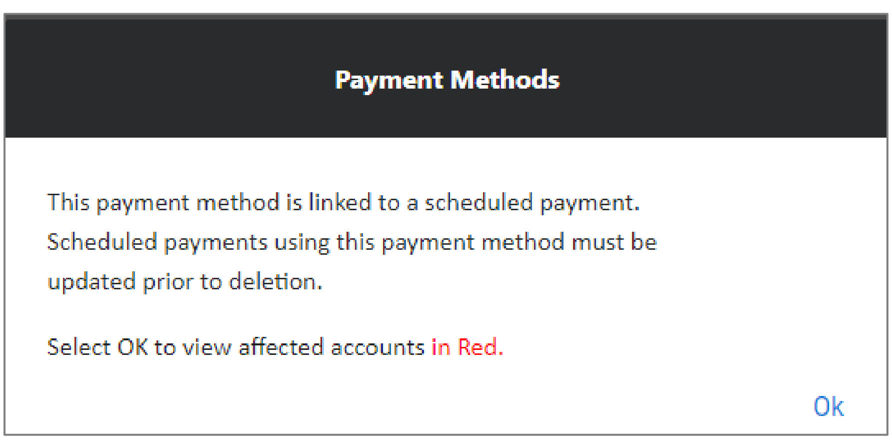
1. Click on Manage Payment Methods.
2. Click on the pencil icon.
3. Edit the information and click **Save**.

Deleting an Existing Payment Method

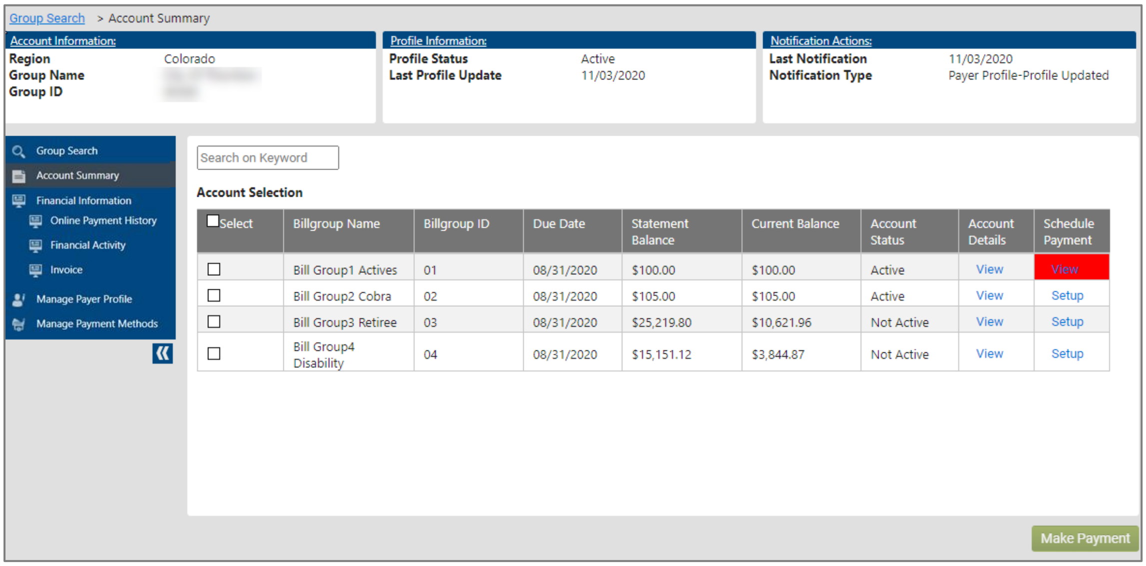
1. Click the trash can icon.
2. Click **Confirm** and **OK**.

Deleting a Payment Method Linked to a Recurring Payment Setup

IMPORTANT: If a payment method is linked to any recurring payments, the pop up below will appear when deleting. Make sure to update all recurring payments with the new payment method prior to deleting the old method or the pop-up below will appear.



1. Upon clicking **Ok** in the prompt, you will be redirected to the Account Summary screen where the billgroups with the outdated payment method will be highlighted in Red.



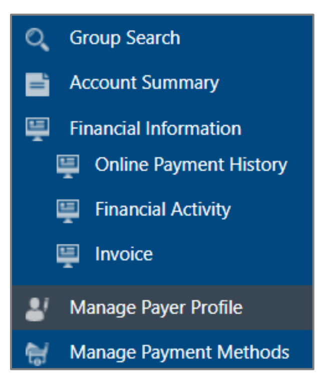
2. Click View on the highlighted item(s) to be directed to the Future Scheduled Payments page.
3. Click **Edit**.
4. On the Scheduled Payments page, update the **Payment Method** for all payments with outdated methods listed.
5. Once all payment methods are updated, the old payment method may be deleted.

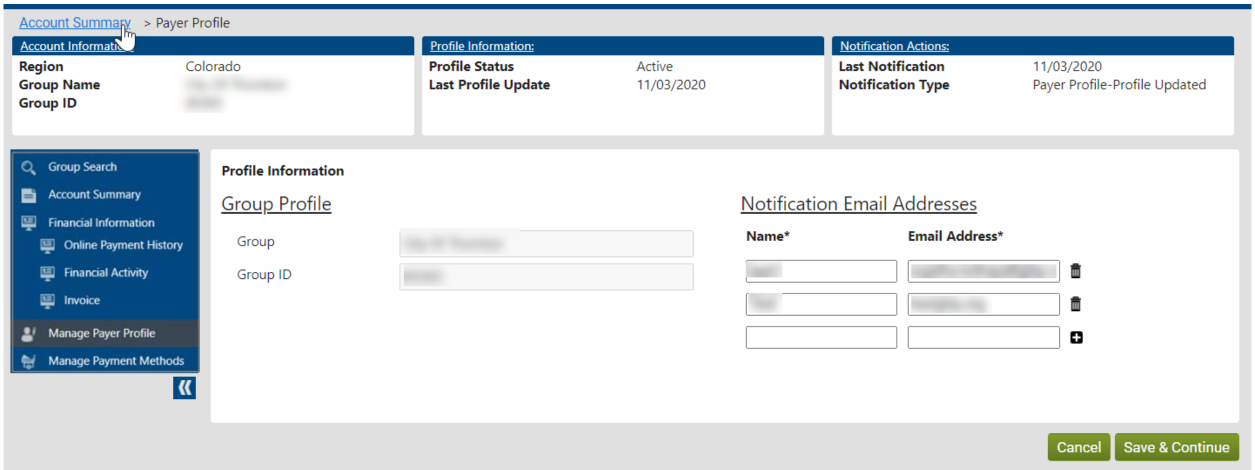
Managing your Payer Profile

The Manage Payer Profile page allows for users to set up email notifications for the group.

Setting Up Email Notifications

1. To set up email notifications, click **Manage Payer Profile.**

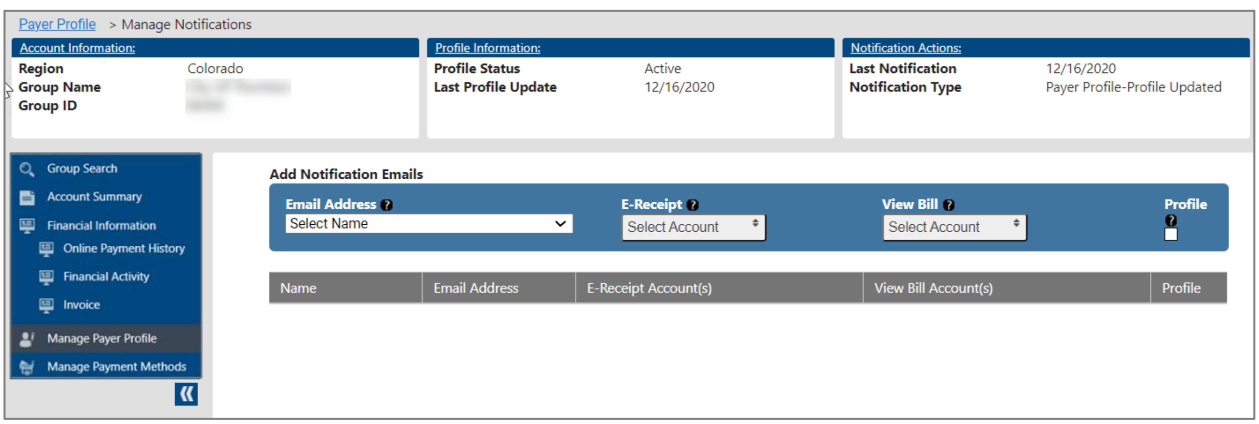




2. Under **Notification Email Addresses**, enter the **Name** and **Email Address** of the individual who will receive the notification(s).

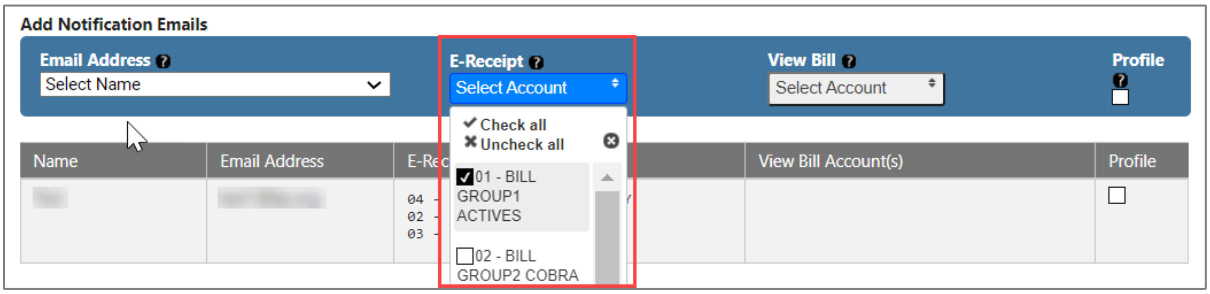
   NOTE: To enter multiple email addresses, click the expansion [+] icon.

3. Click **Save & Continue.**

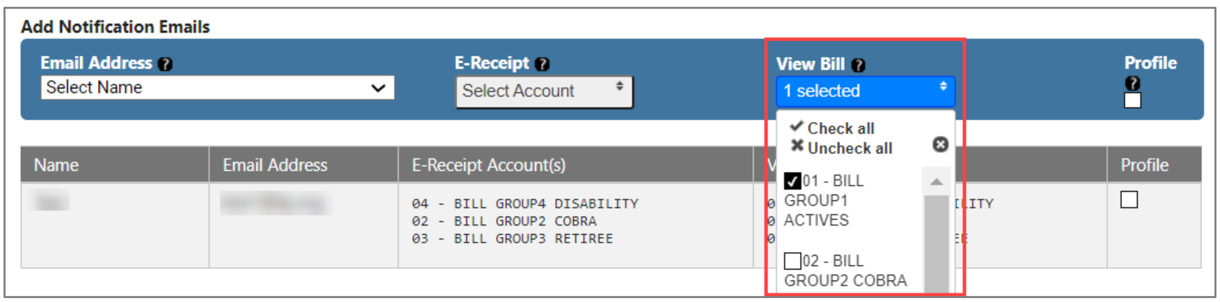


4. Confirm or select the email address from the **Email Address** drop-down.

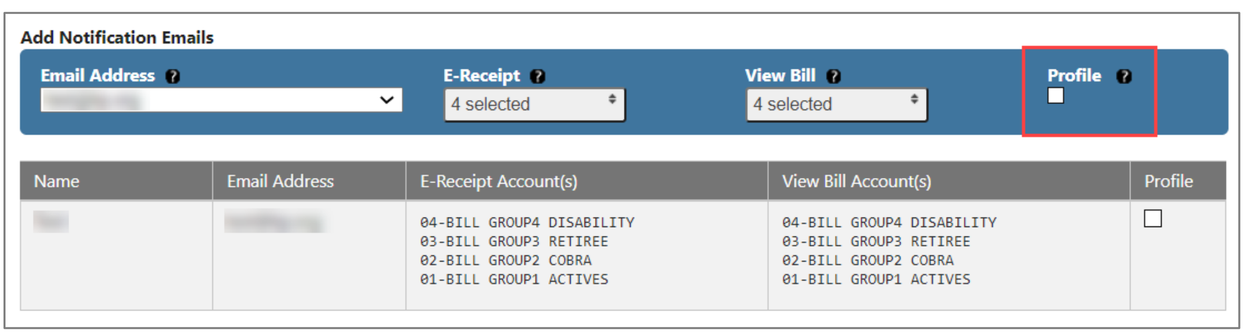
5. For **E-Receipt** (Electronic Receipt), click on **Select Account** to select any account or **Check all** to receive an e-receipt email notification for online payments.



6. Under **View Bill**, click on **Select Account** to select the to select any account or **Check all** to receive an email notification when a premium bill is ready to view online.

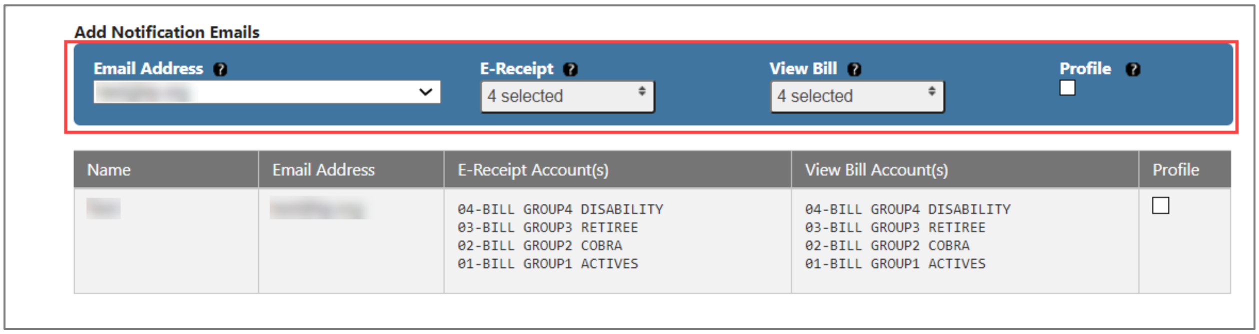


7. Mark the **Profile** check box to receive all other notifications. (ex. updates to scheduled payments, payment methods, etc.)



8. Click **Save.** All changes will be displayed for reference.

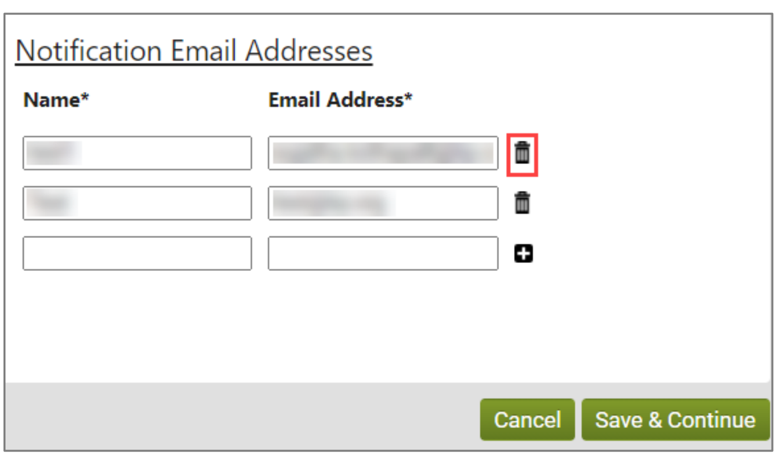
Editing Email Notifications



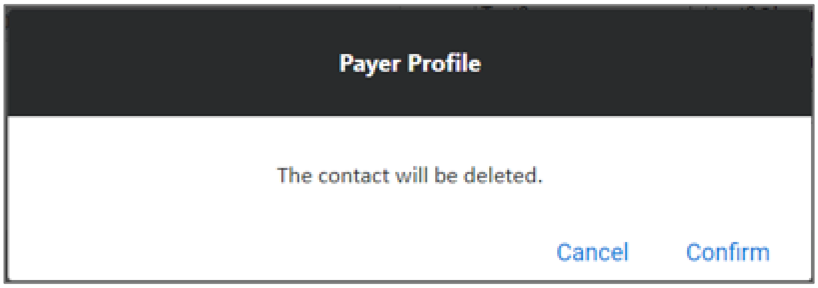
1. To edit up email notifications, click **Manage Payer Profile.**
2. On the Payer Profile screen, confirm information is correct and click **Save & Continue**.
3. Select the address from the Email Address dropdown which needs to be edited.
4. Under **E-Receipt** and **View Bill**, any notifications previously checked will be marked by default. Mark or unmark checkboxes as needed to adjust the notifications received.
5. Click **Save.** All changes will be displayed for reference.

Deleting Email Notifications

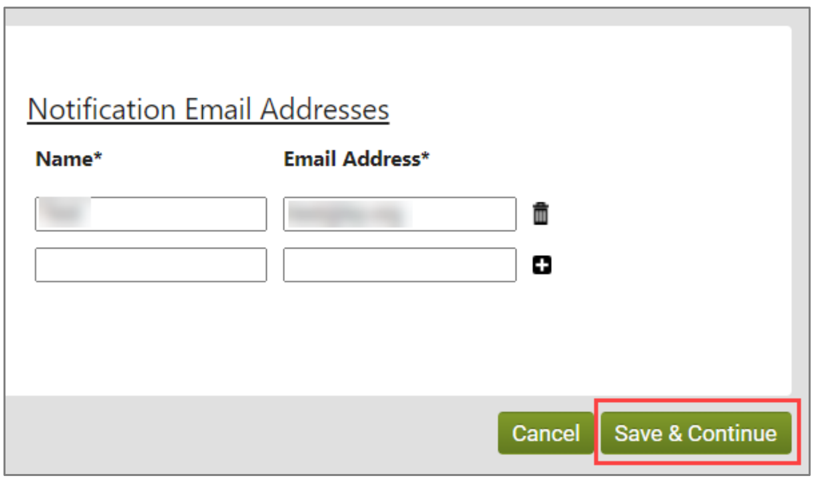
1. To delete an email from the Payer Profile, select the trash icon.



2. A prompt will appear to confirm deletion. Click **Confirm** to delete.



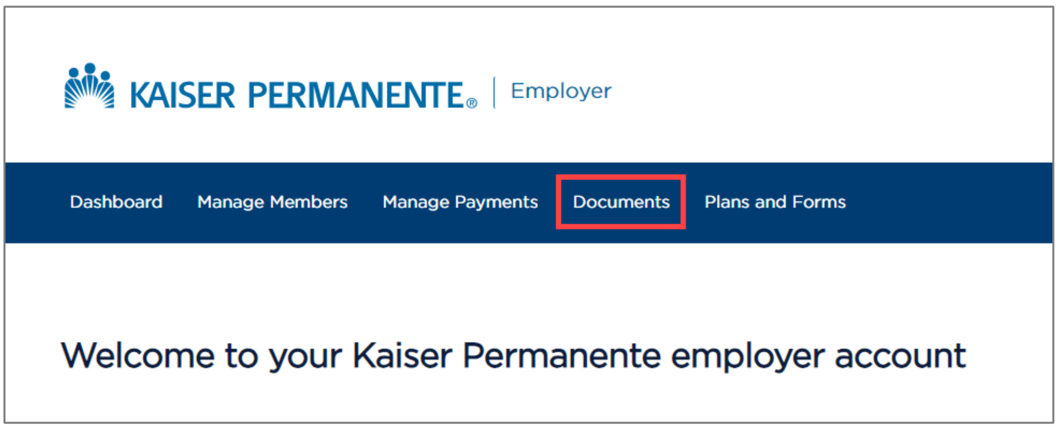
3. Click **Save & Continue**.



Documents

The Documents area offers quick access to frequently requested coverage and financial documents, including group contracts and premium invoices. Note that the documents offered in this area of the site will vary based on your line of business and region.

- Watch the [Using the Documents Section]() video.

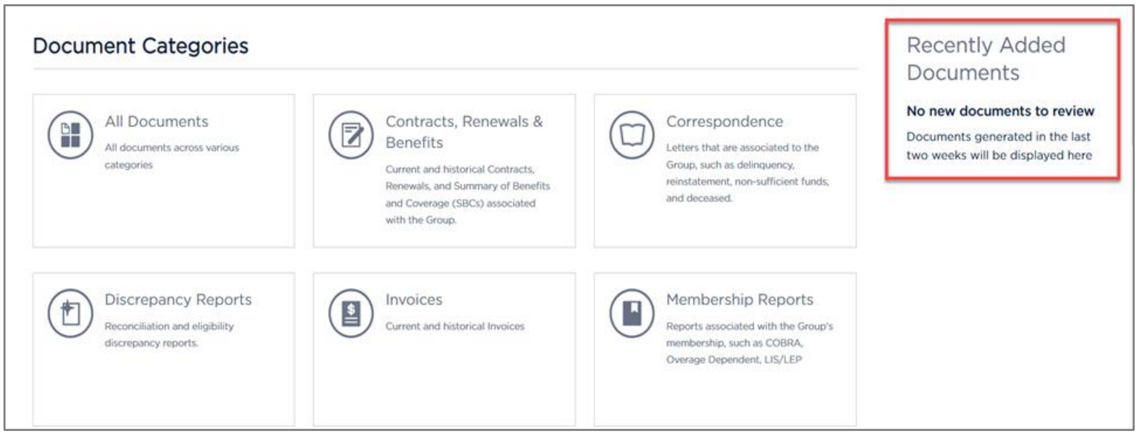


Group Documents

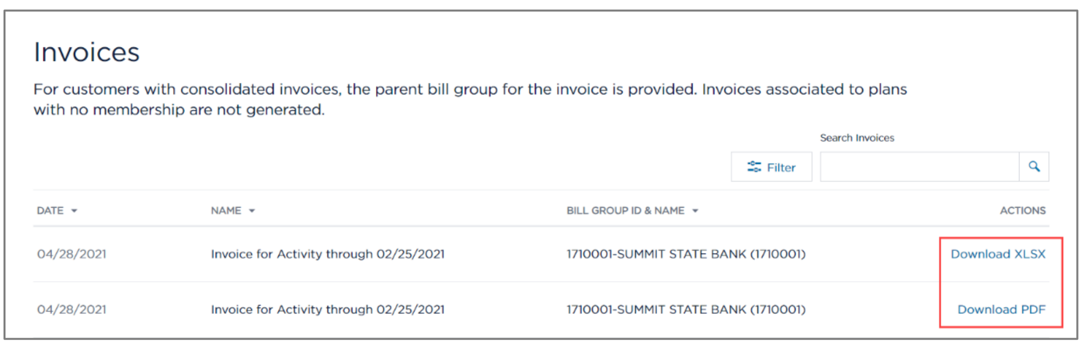
View the group documents, such as contracts, invoices, and discrepancy reports.

1. Click on Documents and enter the group ID for the desired group. If you only have access to documents for one group, you'll be taken directly to the Documents Dashboard for that group.
2. From the Documents dashboard, you can click into any of the Document Categories displayed. The categories shown will vary depending on your level of access to that group's information.

3. Refer to the Recently Added Documents section on the right-hand side for documents that have been added within the last 2 weeks.



4. Once you've chosen a Document category, you'll be taken to a page with all related documents for that category. You can view or download documents by checking the Actions column and choosing your desired option. Invoices, for example, can be found in the Invoices section.



NOTE:

- Invoices are offered in both PDF and XLSX file types. The PDF includes a payment coupon that needs to be included if you pay by check, although we highly recommend paying online via the Manage Payments feature. The XLSX file is a spreadsheet format that is helpful when reconciling membership against another list.

- Additionally, you can view or download a PDF of each document that is part of a contract package or a consolidated PDF of the complete package. All component documents are available as separate PDFs.

Consolidated Invoices

A targeted population of customers that have members in multiple Kaiser Permanente regions receive a monthly consolidated invoice. Kaiser Permanente is transitioning to a new consolidated invoice administration method starting in January 2021. This change will roll out in phases, and we will contact you before your customer is impacted.

Here are a few things to know:

- To access the consolidated invoice, click **Documents**. Select the lead Kaiser Permanente region associated to your account and click **Continue**.
- If your lead region is Washington, your consolidated invoice can be found typically under the "Northwest" region or another active Kaiser Permanente region associated with your account.
- Please do not make an online payment for a consolidated invoice via Manage Payments. To ensure that your payment is allocated properly, please continue to use your established payment method: ACH (Automated Clearing House), Wire Transfer, or USPS (U.S. mail)/Courier Delivery. Please refer to the last page of your invoice for additional payment details.
- To learn how to view your consolidated bill, refer to Invoices.

For any further questions, please contact your Membership Administration team.

Frequently Asked Questions

Questions	Answers
Do I need an access code?	An access code is needed for those who self-register (self-registration only provides sign on, but not the ability to access any secure features).
I registered but don't have access to my account.	An Online Account Services request is required, in addition to the self-registration, in order to link your secure account to your groups. Click the link below to complete either the electronic or PDF version of the request form. To manage employees' Kaiser Permanente health plan membership online, please have your Primary Group Administrator fill out this online account services application form online. For additional information and options click 'Need help'.
I registered and created my own user ID, do I still need an access code?	Yes, once the application has been processed, an email notification will be sent with an access code provided.
How do I set up automatic recurring payments for my bill?	Review detailed instructions with screenshots here. Log in and select **Manage Payments** in the top menu. Scroll to the bottom to **Pay Your Group Bill** and click **Continue**. From the Account Selection Table, Select **Setup** under the column titled **Schd. Payment**. Select the **Payment Method** (click **+** sign to add banking info and Save) Enter the **Setup Effective Date** (effective date you want the recurring payment to start) Select **Days before due date** (we recommend at least 4 business days) Scroll through Terms and Conditions, Accept and Save.

Questions	Answers
How do I request a refund?	For refund requests, please contact Membership Administration: California: Small Business Accounts 800-731-4661, option 2 Large Business Accounts 800-731-4661, option 4 For regions outside California: 866-868-7220, option 8
Do I need an access code every time I log on to the website?	No, the access code is a one-time use, during registration. Once the access code has been entered the first time, it is no longer needed.
How long do I have before my user access code expires?	Access codes are valid for 7 calendar days.
How can I contact you if I still have questions?	Go to account.kp.org/business/contact-us and select your region to identify the best contact for your needs.

Broker Supplement

We value your partnership with Kaiser Permanente. To ensure you have the information you need to manage your Book of Business and work with KP, we've dedicated this section to answering your questions and helping you find support when you need it. Visit our Broker Manage Accounts page for additional information on how to manage your book of business online.

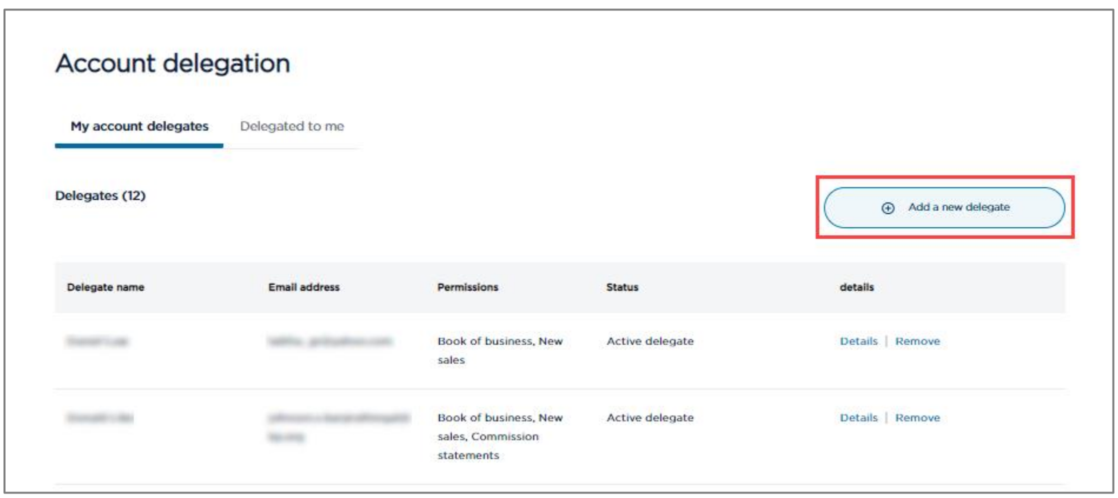
How to manage secure account access

Managing your Book of Business on account.kp.org no longer requires delegation from your group's Primary Group Administrator (PGA). For more information, please visit **Managing account access** in our Client Support section.

Delegation

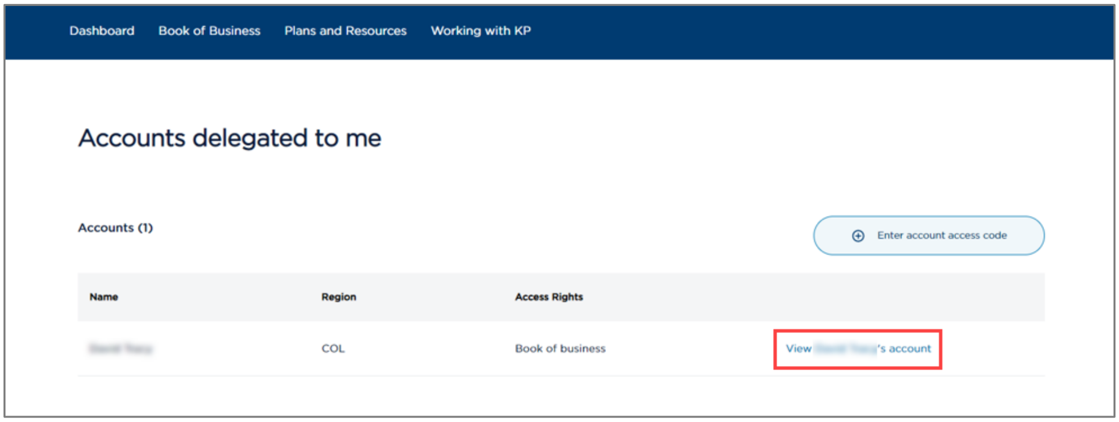
A Broker of Record (BOR) can now delegate access to their Book of Business to associates within their firm. Permissions can be set for firm associates to view group information and even perform updates to group membership.

On the **Account delegation** page, Brokers can share access to their Book of Business with associates by clicking **Add a new delegate** and completing a short form.



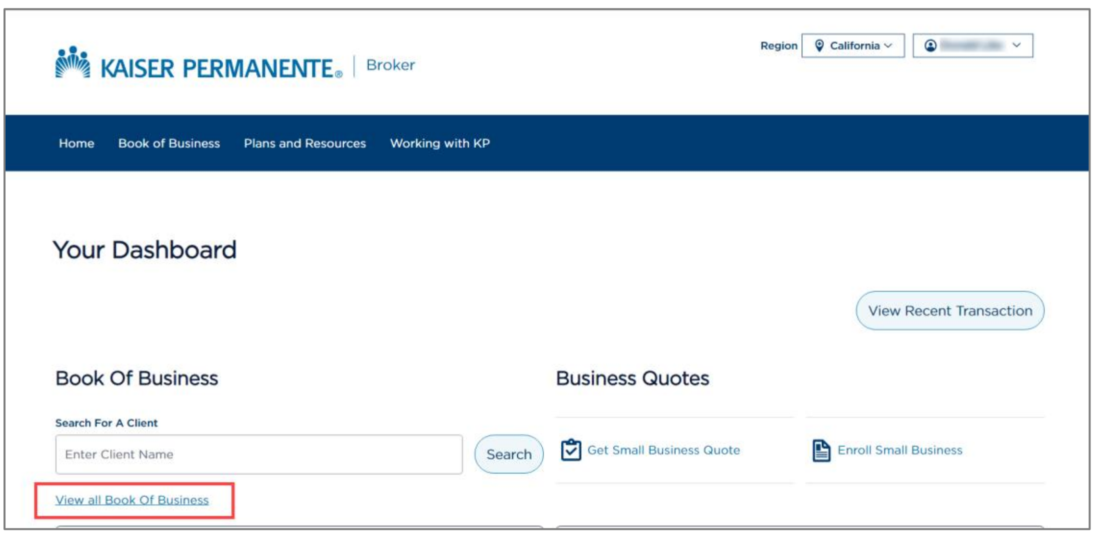
The delegate will receive an email with instructions to sign in. Delegates will receive a code each time they are given access to a new Book of Business. These delegates can view the book of business they have been granted access to by selecting **Accounts delegated to me** in the account utility menu.

Once they have access, they can click **View** [Broker Name]**'s account** to see their Book of Business.



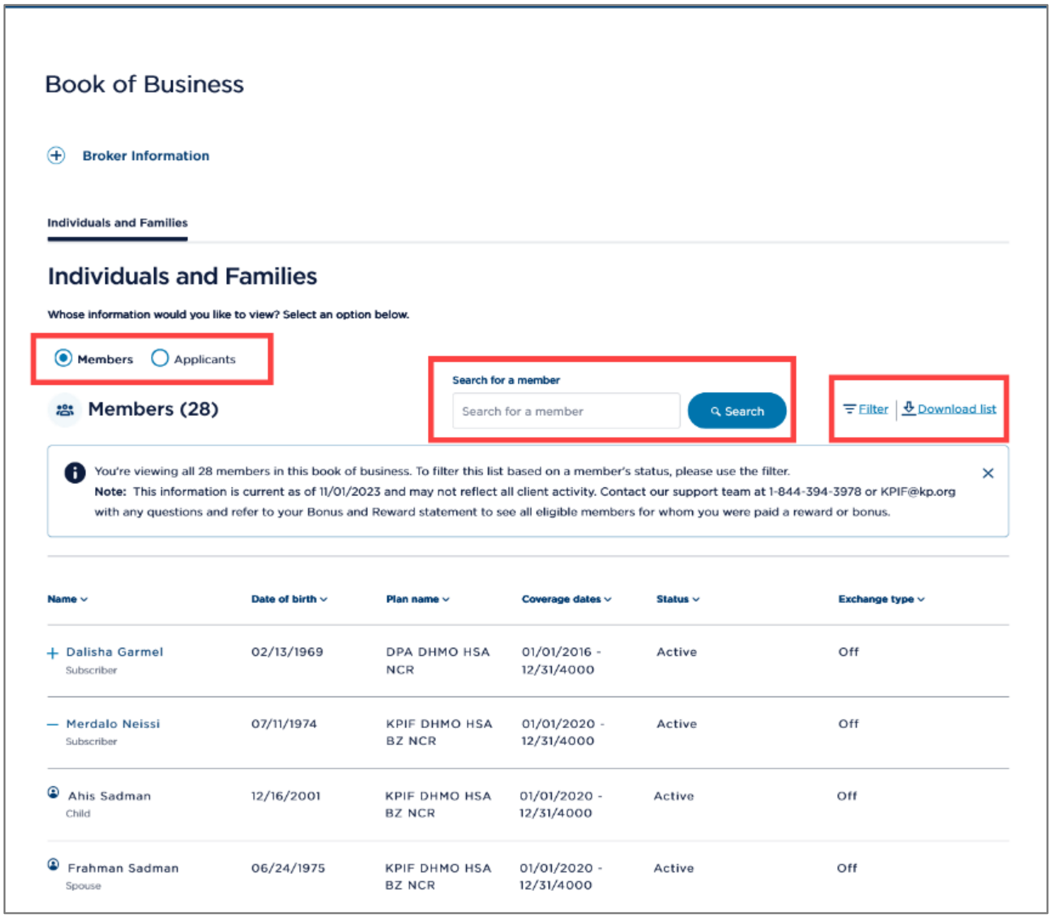
Individuals and Families Book of Business

Brokers supporting Individual and Family clients can view their Book of Business by signing on to account.kp.org and clicking **View All Book of Business** on **Your Dashboard**.



The Principal Agent will be prompted to complete a Business Associate Agreement (BAA) at their initial log in. Once the Principal Agent submits the BAA, other firm agents can view members and applicants under the **Individuals and Families** tab of their Book of Business. Non-principal agents will receive a message requesting the Principal Agent complete the BAA if it has not been submitted.

The Individuals and Families tab information displays a list of Members or Applicants based on the selection made at the top of the page. Members are displayed from the last 12 months, while Applicants are listed for the last 6 months. Both lists are currently limited to Off-Exchange business.



Click the plus '**+** ' next to a Subscriber's name to view their dependent's information. **Search** and **Filter** features are available to the right, above each list, to help locate specific members or applicants quickly. Click **Download list** to obtain a csv file of Members and Applicants lists.

NOTE: Individuals and Families Books of Business with over 2000 members are currently unable to use this feature and must email requests for member information to kpif@kp.org.

Broker Frequently Asked Questions

Our Broker FAQ page answers common questions about doing business with Kaiser Permanente and supporting your clients on account.kp.org. Please remember to select the group region from the menu as the questions and answers may vary.

Broker Support Resources

We have recently updated our online broker resources to make it easy to find the information and tools you need.

- ✓ To find helpful administrative tips, guidance for new brokers, and compensation information, check out the **Working with KP** section.
- ✓ The **Client Support** section has information to help you provide great customer service with materials, information, and online account tools for managing their membership updates in Manage Accounts.

NOTE: remember to select your group region from the menu as the resources and guidance may vary. Both Working with KP and Client Support areas are accessible from the **Quick start** options on the Broker Home page or from the **Broker** menu at the top of the page.

Still have questions and need help?

Unable to find exactly what you are looking for and want to speak to someone for advanced support? Go to our Contact Us page and select your group region to see the broker contact options available for your line of business and type of inquiry.

Account.kp.org Updated Online Experience

Do your screens look *different*? In an effort to provide you with the best online experience we are gradually updating the look of account.kp.org. The new pages will simplify the look and make the process of administrating your groups easier. We began rolling customers onto the new experience in 2021 and will continue to gradually expand to all groups.

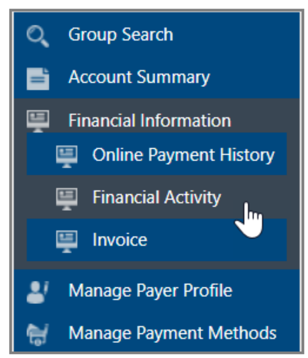
If you are in Colorado, Georgia, Hawaii, and Northwest (Oregon / Southwest Washington), the screens below reflect your current experience.

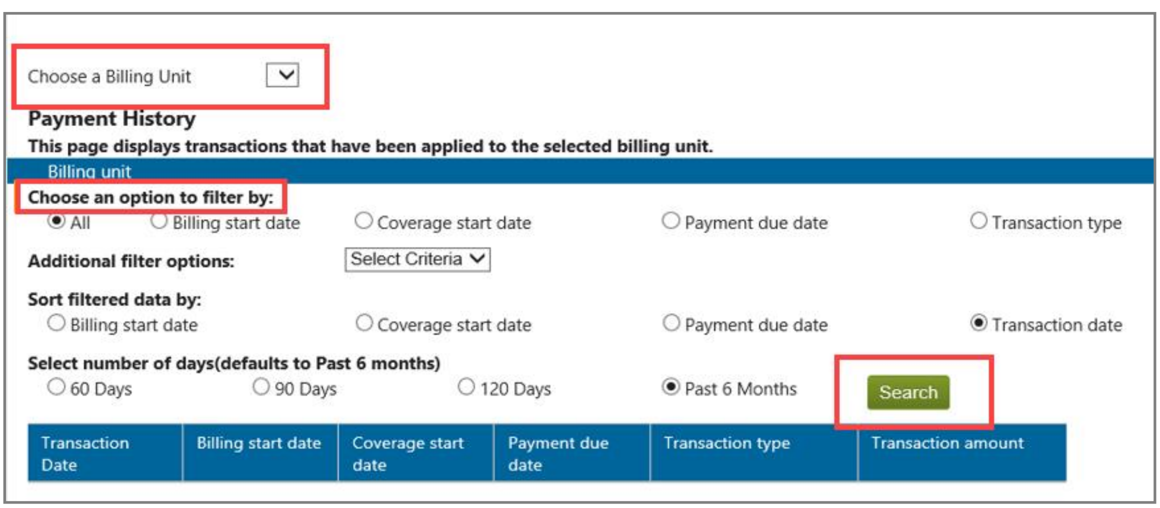
Financial Activity

Financial Activity (formerly named Full Payment History) allows for users to view all payments made (e.g., check, ACH, etc.), refunds, and reversals.

1. To view all payments made other than online payments (e.g., check, ACH, etc.), refunds, and reversals, click **Financial Activity** in the side menu.

2. Select a Billing Unit to view from the drop down. (If you only have one billing unit/billgroup it will automatically be selected.





3. To choose an option to filter by, select **All**, **Billing start date**, **Coverage start date**, **Payment due date**, or **Transaction type**.
    a. Additional filter options allow you to select preferred option based on the filter option selected.
    b. Select the number of days/months of history to view. The default is 6 months.
4. Click **Search** to view payment transactions.

We look forward to sharing more great updates to account.kp.org with you soon!