

# New group enrollment checklist

## Simplify your enrollment process

Providing Kaiser Permanente with the following documents ensures a complete and quick submission. See *Additional Enrollment Tips* for more information.

### Employer Application

The [Employer Application](#) must be current and completed in its entirety. The most current application can be found at [account.kp.org](https://account.kp.org).

### Supporting business documents

All enrolling groups must provide documentation that shows they're eligible to do business in California. Refer to the [New small group eligibility guide](#) to determine which documents are needed by which business entity type. See *Additional Enrollment Tips* for enrolling officers/owners.

### DE 9C/payroll

All enrolling groups that filed with the EDD must provide a current and reconciled DE 9C to show an employer-employee relationship. To reconcile, note the status of each employee directly on the DE 9C. Payroll will only be accepted for startups, new hires, or low-wage validation. Groups with 10+ eligible employees on the Employer Application and 10+ employees on the DE 9C don't need to reconcile.

### Initial payment

Complete the [Electronic Transfer for Initial Payment](#) (EFT) form. This payment is only for the initial premium and won't reoccur. The initial payment is processed within 5 to 7 business days of contract activation. As an alternative, groups can submit a copy of their first month's premium check. **Once they've received confirmation of enrollment**, they need to mail the live check, with the group ID in the memo line, to:

Kaiser Foundation Health Plan, Inc.  
File number 5915  
Los Angeles, CA 90074-5915

### Employee applications and/or declinations

Each eligible employee must provide an enrollment application or declination of coverage. Forms can be found at [account.kp.org](https://account.kp.org). Employers can complete the [Employer Attestation Declination of Coverage](#) form to list all eligible employees who decline coverage, rather than individual declinations.

## Additional enrollment tips

### Breakaways and re-enrollment

- Groups breaking away from an existing business may only do so when they're **not** eligible to file joint state taxes.
- Affiliates will be written under the parent group in the event that they **are** eligible to file joint state taxes.

Groups should update their current contract with the Account Management team if they're:

- with similar owner/contacts, physical location, and/or members (regardless of new company name and/or tax ID).
- not breaking away from an existing group that remains active with enrolled membership.

### Enrolling owners/officers

Enrolling owners/officers are eligible for coverage when at least one W-2 employee (not a spouse or domestic partner) has a minimum of 6 weeks of eligible payroll. The W-2 employee can enroll or waive valid group coverage. Enrolling owners/officers who aren't on payroll must provide support documentation.

Refer to the [New small group eligibility guide](#) to determine which documents are needed.

### Electronic signatures

We accept electronic signatures that indicate a document control number for each e-signature. Common platforms that are accepted include DocuSign, Adobe Sign, EaseCentral, Employee Navigator, ProApply, and Verisign. Some platforms may not have a document control number listed on the form. If that's the case, the confirmation page must be provided.

### Groups with employees in Northern and Southern California

A group with 6+ enrolling members outside of the group's home region will be set up with 2 contracts. Rates will be determined based on the headquarters of the group.

### PPO options

Kaiser Permanente allows one PPO plan option per contract and must be the sole carrier. Groups with PPO enrollment can't exceed 30% of enrollment on the PPO plan option.

### Contact us

For general underwriting and sales questions, contact us at **800-789-4661**.