


- ▶ Login to <https://account.kp.org/business/secure/ca/broker>
- ▶ Enter your User ID, then Password and click Login



Sign in to your Kaiser Permanente business account

User ID

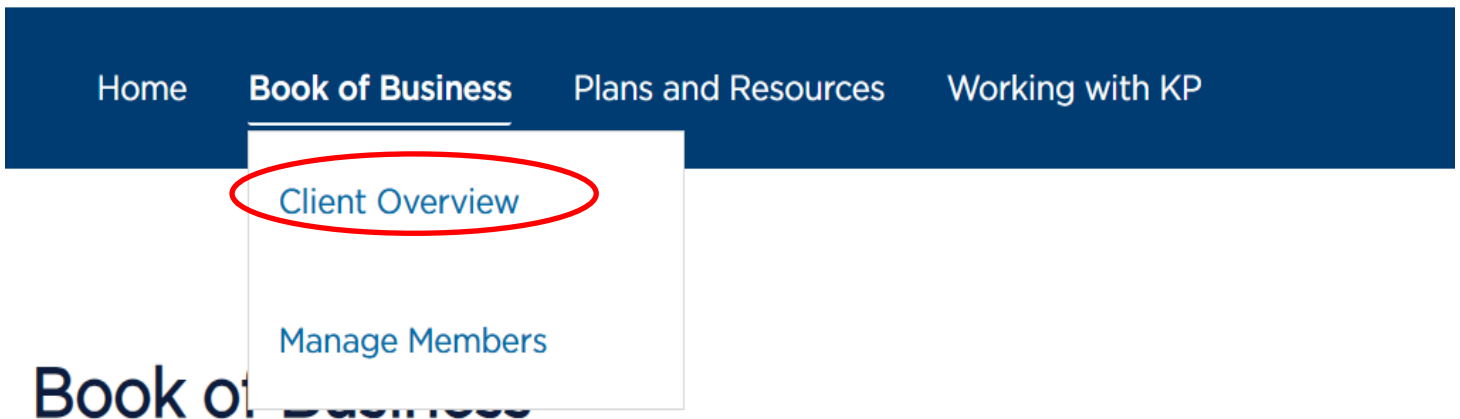
[Forgot your user ID?](#)

Password

[Forgot your password?](#)

[Register for an account](#)

- ▶ Select **"Book of Business"** then Select **"Client Overview"**



- ▶ Under your book of business, find the client you want to audit, select the drop down "**Choose One**"

Book of Business

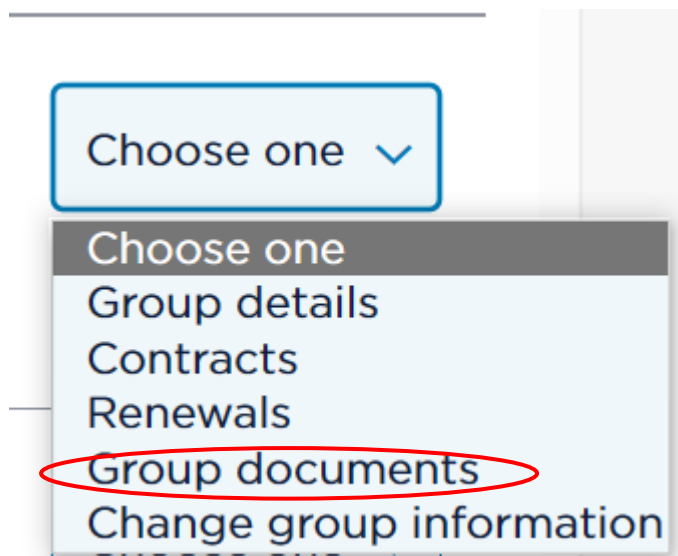
Small Business Large Business

Small Business (29)

[Filter](#)[Download list](#)







Client name ▼	Client ID ▼	Renewal date ▼	Brokerage firm ▼	Office location ▼	Agent ▼	View upcoming renewal ▼	More Details ▼
MICHAEL SCOTT PAPER CO.	123456	01/01/2025	DUNDER MIFFLIN INSURANCE	SCRANTON	Toby Flenderson		Choose one ▼

- ▶ Under the drop down "**Choose One**" then Select "**Group Documents**"





- ▶ Once the under the Document Categories, select **"Invoices"**

Document Categories

 All Documents All documents across various categories	 Contracts, Renewals & Benefits Current and historical Contracts, Renewals, and Summary of Benefits and Coverage (SBCs) associated with the Group.	 Correspondence Letters that are associated to the Group, such as delinquency, reinstatement, non-sufficient funds, and deceased.
 Discrepancy Reports Reconciliation and eligibility discrepancy reports.	 Invoices Current and historical Invoices	 Membership Reports Reports associated with the Group's membership, such as COBRA, Overage Dependent, LIS/LEP

- ▶ A list of Invoices will appear, find the most current month, select **"Download XLSX"**

Search Invoices

 Filter 

ACTIONS

Download PDF

Download XLSX

Note: Multiple XLXS could be available for one month, especially if your client has Southern and Northern CA contracts. If you see multiple bills, open the excel and look under tab **"Membership Details"**, if no employees are listed, disregard that file and download the other XLSX for that month, it will include the membership. If you see membership on both files for the same month, you will need to combine the membership onto one report for the audit. Reach out to CW for assistance if you have questions.

- ▶ Open the file that states, **"Invoice for Activity for (date) "**. Once the file is downloaded. Upload the Excel file to Coverage Wizard!

- ▶ The Download Billing Statement will appear, listing out the employees, plans and cost. Scroll to the bottom of the page and select "**Download**"

Download Billing Statement

Member Name	Member Id	Premium Type	Basic Term Life Volume	Cancer Family Indicator	Cancer Premium	Dental Family Indicator	Dental Premium	Ltd Premium	Ltd Volume	Managed Dental Care Mdc Family Indicator	Managed Dental Care Mdc Premium	Vision Family Indicator	Vision Premium	Other
20000														
20000		Emp			\$35.11		\$17.94	7800			Emp		\$7.88	

1 2 3 [Next](#)

Cancel

Download

- ▶ Open the file that states, "**DownloadFile (1).csv**". Once the file is downloaded. Upload the Excel file to Coverage Wizard!