

## BROKER NEWS | CALIFORNIA

# View your clients' bills online

It's easier than ever to see all of your clients' bills in one convenient place. Now you or your authorized representative can access bills for the past 12 months right from your book of business at our broker website. Here's all you need to do:

## Step 1: Visit your broker dashboard

- ▶ Go to [account.kp.org](http://account.kp.org).
- ▶ Log in with your user name and password.

## Step 2: Navigate to financial documents

- ▶ Click on "view entire book of business."

The screenshot shows the Kaiser Permanente Broker dashboard. At the top, there is a navigation bar with links for 'Employers', 'Home', 'Sign off', and 'Contact us'. Below this is a secondary navigation bar with 'KAISER PERMANENTE | Broker' and links for 'Selling plans', 'Your clients', 'Working with KP', 'Resource library', and 'Your account'. The main content area is titled 'Broker dashboard' and includes a search bar for clients, a 'View entire book of business' link (circled in orange), and sections for 'Upcoming renewals' and 'Recent compensation'. An 'Important notice' is also visible at the bottom.



If you have any questions about accessing your clients' bills online, please contact your Kaiser Permanente representative.

- ▶ Go to the "more detail" drop-down menu and choose "group documents."

Choose BETTER. Employers Home Sign off Contact us Search

KAISER PERMANENTE Broker Selling plans Your clients Working with KP Resource library Your account

Welcome, Shannon Zajec California View another region

### Book of business

Questions about the information you're viewing? Please contact the Client Service Unit at 1-866-236-0189, Monday through Friday from 8 a.m. to 5 p.m. for assistance.  
View or download your small and large group client lists and contracts. Small business groups with upcoming renewal packages are also available to review. Note: At this time individual and Family plan book of business listings are not available.

Downloads  
[Small business](#)  
[Large business](#)  
[All lines of business](#)

Search for a client  Search

Filter by:  
Office location: All locations Go  
Agent: All agents Go

Small business Large business

Client name	Client ID	Renewal date	Brokerage firm	Office location	Agent	More detail
<a href="#">Advance Kids</a>	603794	01/01/2015	Employers Select Insurance Services, Inc.	Rocklin	Shannon Zajec	Group documents Group info Contracts Group documents
<a href="#">First northern bank</a>	600514	01/01/2015	Employers Select Insurance Services, Inc.	Rocklin	Shannon Zajec	Group documents
<a href="#">Morton &amp; Pflanz, Inc.</a>	63010	04/01/2015	Employers Select Insurance Services, Inc.	Rocklin	Shannon Zajec	Choose one

- ▶ Choose "go to all financial documents."

Choose BETTER. Employers Home Sign off Contact us Search

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Welcome, Shannon Zajec California View another region

[Back to client summary](#)

## Group Documents

Client ID: 1168  
Client name: Sacramento country day school  
Original KP effective date: 02/01/1972  
Renewal Date: 11/01/2015  
Total members:  
Risk adjustment factor:

Contact information:  
RUDYRICK KOPELAK  
Phone: 9164812511  
Fax: 9164816110

### Financial

[View billing statements.](#)  
[Go to all Financial document](#)

Go to my:  
 Group member details  
 View contracts

KAISER PERMANENTE

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You will need the free Adobe Acrobat Reader to read PDFs.

### Step 3: View, print, or download bills

Choose “view billing statements,” then click on the activity period you wish to view. You’ll need Adobe Reader to open the bills – if it’s not already installed on your computer, you can download it for no charge at [Adobe’s website](#).

The screenshot shows the Kaiser Permanente account portal. The top navigation bar includes links for 'Choose BETTER.', 'Employers', 'Home', 'Sign off', and 'Contact us'. The main header features the Kaiser Permanente logo and navigation options: 'Broker', 'Selling plans', 'Your bills', 'Working with KP', 'Resource library', and 'Your account'. A welcome message for 'Shannon Zajac' is visible. The 'Financial' section contains client information (Client ID: 1100, Client name: Sacramento country day school, Original KP effective date: 02/01/1972, Renewal Date: 11/01/2015, Total members, Risk adjustment factor) and contact information for RUDYRICK KOPELAN. A 'Go to my:' section offers links for 'Group member details' and 'View contracts'. The 'Financial statements' section is expanded to show 'View billing statements.' and a 'Billing Statement' section. A table below lists activity periods for 2014, with the first two rows circled in orange: '2014-06-10' and '2014-05-10'.

Activity through	Coverage period	Enrollment unit
2014-06-10		
2014-05-10		0

The bills will look like this:

**KAISER PERMANENTE**  
 P.O. BOX 23250  
 SAN DIEGO, CA 92193-3250  
 00000000-0001 L

ACME COMPANY HMO SCR  
 CORPORATE ACCOUNTS PAYABLE  
 123 JACKSON ST STE 100  
 LOS ANGELES, CA 90210-1021

**AMOUNT DUE: \$63,474.16**  
**DUE DATE: JANUARY 10, 2015**

JANUARY 2015 statement includes membership and financial transactions processed from 11/11/2014 through 12/10/2014

To receive billing and membership information online, log on to: [kp.org/ouremployers](http://kp.org/ouremployers)

Refer to the Billing Summary page for all billing unit(s) included in this statement.

(RETURN THIS PORTION WITH YOUR PAYMENT)

Billing Unit: 000000000 Customer ID: 00000000-0001

ACME COMPANY HMO SCR  
 CORPORATE ACCOUNTS PAYABLE  
 123 JACKSON ST STE 100  
 LOS ANGELES, CA 90210-1021

Provide Billing Unit number(s) on check and make it payable to:

KAISER FOUNDATION HEALTH PLAN  
 FILE 0001  
 LOS ANGELES, CA 90074-0001

REMITTANCE ADVICE FOR: JANUARY 2015

Please pay this Amount: \$63,474.16

AMOUNT PAID: \_\_\_\_\_

Due Date: JANUARY 10, 2015

Billing Detail  
 00000000-0001  
 ACME COMPANY HMO SCR  
 Payments Detail

JANUARY 2015

Number	Remittance Amount	Billing Unit	Coverage Period	Transaction Amount
77194	117,917.96	000000000-0001	11/01/2014	-423.67
		000000000-0001	12/01/2014	-59,821.69
<b>Total Payments Received:</b>				<b>-\$60,245.36</b>

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**KAISER PERMANENTE**

Billing Summary  
 00000000-0001  
 ACMECOMPANY HMO SCR

JANUARY 2015

Previous Balance Due		60,245.36
Payments	-BU 000000000-0001	-60,245.36
Adjustments	-BU 000000000-0001	0.00
Retroactive Dues	-BU 000000000-0001	-1,271.00
Current Dues	-BU 000000000-0001	64,745.16
<b>TOTAL DUE BY 01/10/2015</b>		<b>\$63,474.16</b>

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Information may have changed since publication.