Enrolling Multiple Members at Once

In this video, we'll show you how to enroll multiple members using a spreadsheet in account.kp.org.

This is useful for administrators who have many enrollments to process.

First, make sure you've signed into account.kp.org and have clicked Manage Members where you can view your group.

Click Mass Enrollment in the upper right.

On this screen, you'll download a spreadsheet template, then upload the completed file with up to 250 members per group.

For larger groups, you can submit multiple files per day, as long as each file holds a maximum of 250 members.

Please note, the mass enrollment spreadsheet only works for enrolling members.

You cannot use the spreadsheet to change or terminate coverage, update demographics, or add family members to an already enrolled member account.

To select the correct Excel template, enter your region, Group ID and Group Name, as needed.

Click Download Template.

Open the Excel template from your computer's download folder.

Enter the member information on the Enrollment Data tab.

Please Note: To ensure correct processing, only enter the member's data and avoid changing the structure of the spreadsheet.

The Instructions tab at the bottom outlines key steps for your reference.

After you have completed the spreadsheet, save the file to your computer.

Return to the Mass Enrollment screen.

Click Upload Members.

Complete the Region, Group ID, and Group Name fields to indicate where to enroll the members.

Drop or select your file in the grey section and click Upload Members.

During the upload, the system validates the information in the spreadsheet and generates applications for each prospective member.

When the upload is complete, a message appears indicating how many of the applications: are ready to submit, have errors, or are rejected.

Click Close.

Next, you’ll see a page with three tabs for Ready, Error, and Rejected applications.

On the Ready tab, you can either click Submit Ready Applications to send them all at once.

Or review each application individually.

Use the Actions menu on the right to edit, delete, submit, or save the application for later.

Applications you 'Save for Later' will be saved for 30 days. Check out the Enrolling a Member video for further details.

California and Hawaii groups will also see an option to upload Member Arbitration Agreements, if desired.

When you are ready to submit the applications, click Submit Ready Applications.

You’ll see a message showing the number of successfully submitted applications.

Each application has a confirmation ID for tracking purposes.

You can view the status of each individual application in Transaction History.

The Error tab will list applications with missing or incorrect data.

You can remove these applications from the enrollment process by clicking Delete All Error Applications.

Or, you can review them individually to fix the errors.

Click the Actions dropdown menu on the right.

Select Edit to make changes now, or Save for Later to hold the application for corrections in the next 30 days.

If you choose to edit an application, be sure to correct the errors identified before clicking Submit Application.

The Rejected tab lists applications that cannot be accepted.

Click the Actions dropdown on the right to delete the application, or view the reason for rejection.

Most applications are rejected because the member is already enrolled or the subgroup ID is invalid.