

## General

### What is a Health Assessment (HA)?

A HA has 20-30 questions that help the health plan identify programs and resources that fit the member's needs. By completing a HA, the member will also receive a care plan with goals that are based on the answers.

### Why should I help a member submit a HA?

As an agent, you are often the first interaction a member has with UnitedHealthcare. When you assist a member in completing a HA, you are helping them to take full advantage of their health care plan.

## Eligibility

### What types of agents can submit HA for enrollees?

The UnitedHealthcare agreement will note if HAs are included.

### How do I become eligible to be paid for completing a HA on behalf of UnitedHealthcare?

To be paid for completing a HA, you must be eligible, the member must enroll in an eligible plan, the enrollment application must be completed using LEAN or an approved third-party platform and the HA must be completed on the same platform as the enrollment application no more than 3 calendar days after the consumer signature date.

**Agent Eligibility** – You must be licensed, appointed, and product certified. In other words, if you are not eligible for a commission payment for the enrollment application, you are not eligible for payment for the associated HA.

**Plan Eligibility** – The consumer must be enrolling in an eligible MA/MAPD, Dual SNP (D-SNP), or Chronic SNP (C-SNP). Ineligible plans include those deemed non-commissionable at the time of enrollment and any stand-alone PDP, Medicare Supplement, or I-SNP plan. The approved third-party platforms will prevent you from taking an HA for an ineligible plan or plan type.

**Approved Third-Party Platform** – Approved third-party platforms are limited to Connecture, MyMedicareBot, and Sunfire.

**Other Eligibility Criteria** –The enrollment application must be approved and the consumer enrolled (i.e. accreted application). See your Agent Guide and Contract for more information.

## Training

### Do I need to take HA training to be eligible to complete an HA?

No. An attestation will appear at the beginning of each HA you start in the approved third-party platform. You must read and acknowledge each statement before you will be able to submit the HA.

## Completing the Health Assessment

### When may a HA be completed?

The HA must not be completed until the enrollment application has been submitted. Health Assessment must be completed on the same platform as the enrollment application no more than 3 calendar days after the consumer signature date.

### How do I complete a HA in the approved third-party platforms?

The entire HA process is completed in the approved third-party platform. Refer to resources provided by your agency or the approved third-party platform you use to complete enrollment applications.

### Do I need to complete the attestation each time I complete a HA?

Yes. You will not be able to submit the HA without completing the attestation.

### Does any information entered in the enrollment application get pulled into the HA?

Yes. The consumer's demographic information pre-populates from LEAN or the approved third-party platform enrollment application. If you did not enter the consumer's home phone number during the enrollment process, you will need to manually enter it in the HA.

### What if I want to check the status of a HA submitted for a member?

Check with your agency or the approved third-party platform.

## Health Assessment Payment

### How will the HA payment appear on my commission statement?

If you are a non-employee/contracted agent, you will find HA payments on the Commission Transaction tabs of the Excel version of your commission statement.

### How frequently will HA payments process?

Payments process monthly the month after the effective date of the plan. For example, HAs for plans with January 1 effective dates will be processed the last week of February.

### I haven't received payment for a HA submission, what should I do?

Verify that all eligibility criteria were met to receive payment for completing a particular HA. The HA payment for January 1 plan effective dates will be processed in late February. Please wait one commission payment statement past when you were expecting payment before contacting the PHD for assistance.

### If I have an Assignment of Commission (AOC) in place, who will receive the HA payment for the member I enrolled?

HA payments process the same as other payments through the system. For non-employee, contracted agents, if there is an AOC in effect, the assignee will receive the HA payment for HAs completed by the assignor.

### Are HA payments reported as revenue like commissions? And if so, in what year will they be reported?

Yes, for non-employee, contracted agents, HA payments are considered revenue and are reported on the 1099 for the year in which it was paid.

## Troubleshooting

If you have questions about completing an HA, see the applicable resources for the approved third-party platform you are using.

If you have Health Assessment questions, please contact the PHD at 888-381-8581, Monday through Friday 7:00 AM to 9:00 PM CT.