New premier client onboarding = earlier engagement =

more satisfied clients

Introducing a new welcome experience for clients and easier first-visit scheduling.

Put your clients ahead of the rush at the start of the year so they get priority scheduling. This will also help lower the number of service calls and improve client retention by making sure your clients get appointments.

You can complete premier client onboarding in four easy steps.

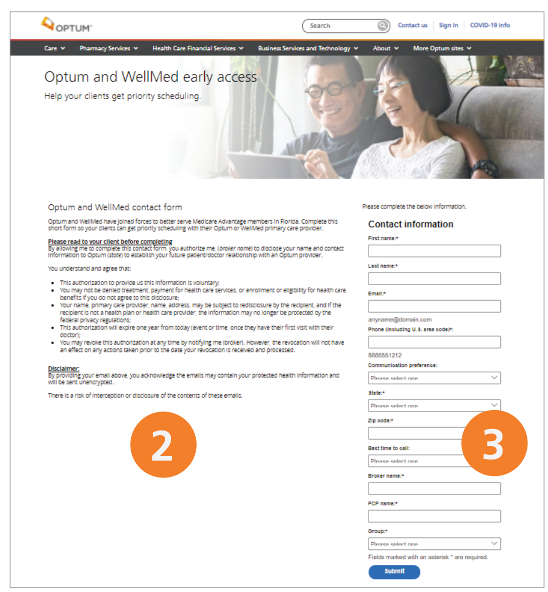
1 **Visit optum.com/patientearlyaccess or scan the QR code on the right.** The QR code and link can be found on other marketing materials and landing page click-throughs.

2 **Read this disclaimer aloud to your client before starting the form.** (It's also reprinted on the site.)

"By allowing me to complete this contact form, you authorize me, (broker name) to disclose your name and contact information to Optum (state) to establish your future patient/doctor relationship with an Optum provider. **You understand and agree that:**

- This authorization to provide us this information is voluntary.
- You may not be denied treatment, payment for health care services, or enrollment or eligibility for health care benefits if you do not agree to this disclosure.
- This authorization will expire one year from today (event or time, once they have their first visit with their doctor).
- You may revoke this authorization at any time by notifying me (broker). However, the revocation will not have an effect on any actions taken prior to the date your revocation is received and processed."

3 **After you've read the disclosure to your client, you can complete the form.**



4 **Let your clients know what to expect next.**

- A welcome email will arrive shortly.
- A phone call will follow to schedule their first visit.

Questions?

Please reach out to your local marketing contact.

Thank you. We look forward to connecting with your clients.

OPTUM®