

Agent code of conduct

We know things may work a bit differently this year. For the safety of our patients, these expectations apply even when physical distancing is necessary or phone/video visits are required. Integrity and a high standard of ethics are fundamental to our working relationship with agents. Here are minimum service standards that we expect from our agent partners.

Knowledge of Medicare Advantage

- Demonstrates strong understanding of networks
- Provides sophisticated knowledge of contracted plans' products
- Understands the difference between delegated plans and non-delegated plans
- Navigates patient through questions to help identify what/why a benefit may be or become relevant if enrolled in Medicare Advantage
- Uses tools and resources creatively but compliantly to assist patient (for example, comparison models)

Customer service

- Places the patient first at every interaction
- Resolves to find answers or next best contact for patient's question
- Commits to logging interactions with Optum patients for reporting and data

Year-round support

- Partners throughout the year outside of AEP for OEP and SEP
- Participates in events and initiatives to better understand clinic model
- Demonstrates knowledge of the Optum model of care and brand

Professionalism

- Maintains the highest ethical standards in all business interactions
- Arrives to events, meetings and appointments on time
- Alerts agency leadership if unavailable for shift or appointment
- Dresses professional; no jeans when meeting or working in clinic
- Respects clinical staff
- Uses a reasonable voice level and is aware of surroundings when discussing patient information
- Provides reporting on leads and conversions to business lead

OptumCare[®] is part of Optum[®], a leading health services and innovation company.

Optum[®] and OptumCare[®] are trademarks of Optum, Inc. All other trademarks are the property of their respective owners. Because we are continuously improving our products and services, Optum reserves the right to change specifications without prior notice. Optum is an equal opportunity employer.