



The Broker Compass: Guide to Member Touchpoints

The Broker Compass is designed to help you stay ahead by aligning your outreach with what members are already hearing from UnitedHealthcare – giving you a smart, timely way to deepen engagement with your book of business.

A quarterly guide to key topics UnitedHealthcare is messaging to members, along with the reasons behind those messages and suggested touchpoints you can use throughout the year. This gives you a clear roadmap to leverage your existing materials – like videos, flyers and brochures – in ways that feel relevant and timely to your clients.

It's not just about supporting UnitedHealthcare – it's about helping you build stronger relationships, drive more meaningful conversations and grow your business with confidence.



Q1

Onboarding

Description/call to action

Drive new members to download the UnitedHealthcare® app and create their online member account.

Purpose

Welcome members and communicate that UnitedHealthcare is where they can manage their plan, anytime, anywhere.

Suggested broker touchpoint

Review the UHC app download and online account registration steps and help members manage their plan.

Available materials



Video: Mobile app.



Content: Welcome mailing.



PCP update

Description/call to action

Emphasize the importance of selecting a Primary Care Provider (PCP) and highlight how simple the selection process is. Encourage them to confirm their doctor or care facility if in-network, as out-of-network care may cost more.

Purpose

Ensure every member has a PCP on file and understands the steps required to make their selection. Some plans will auto-assign a PCP if not selected within 30 days of enrolling.

Suggested broker touchpoint

Remind members of the need to select a PCP and guide them to the portal for step-by-step instructions and support.

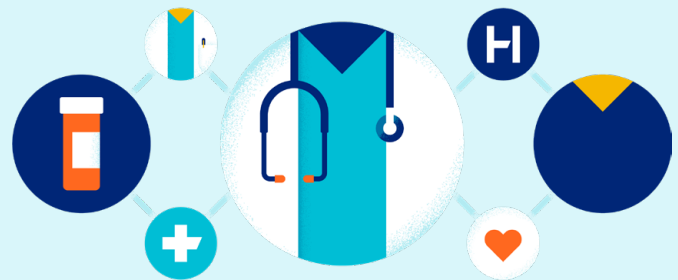
Available materials



Videos: How to Portal, What's in my plan, Getting care from a specialist, Staying in network, Finding a PCP.



Content: Member Portal flyer.



Health Risk Assessment

Description/call to action

Encourage members to complete the Health Risk Assessment (HRA) by highlighting its importance in supporting personalized care and improving overall health outcomes and get them one step closer to gaining rewards.

Purpose

Increase member engagement by motivating them to take the necessary steps to complete the HRA, which helps identify health risks early and tailor care accordingly.

Suggested broker touchpoint

Communicate the value of completing the Health Risk Assessment (HRA) to members. This includes explaining how the HRA helps identify potential health risks early, enables more personalized care and may unlock benefits such as wellness incentives or improved plan support. Encourage members to complete the HRA by guiding them through the process and addressing any questions they may have.

Available materials



Content: Rewards flyer.



Diabetes coverage

Description/call to action

Schedule a checkup with your PCP. Take advantage of the coverage including \$0 covered insulin, \$0 prescription supplies and \$0 coverage on 8 key lab tests and screenings (not valid in MA).

Purpose

It's important to know that these diabetes-specific benefits can make a meaningful difference for members – helping them stay on top of their health while minimizing out-of-pocket costs.

Suggested broker touchpoint

Educate on diabetes management tools and low-cost prescription options. \$0 management reference and benefits.

Available materials



Content: Diabetes flyer.



Pharmacy benefits

Description/call to action

Encourage members to explore and utilize all available pharmacy offerings.

Purpose

Educate members on how to make the most of their pharmacy benefits. Plans offer members access to a wide range of \$0 covered medications – making it easier and more affordable to manage chronic conditions like diabetes, certain heart conditions, mental health issues and more.

Suggested broker touchpoint

Send a reminder to members about their pharmacy needs and available support.

Available materials



Video: Prescriptions and Pharmacy.



Virtual Care

Description/call to action

Virtual Care is positioned as a convenient, high-quality care option for members, accessible via the myUHC app or portal.

Purpose

Drive engagement with UnitedHealthcare as the primary care provider even for virtual care. Enhance member satisfaction and retention by offering flexible, digital-first care. Support by simplifying access and promoting proactive health management.

Suggested broker touchpoint

Share FAQs and benefit guides.

Available materials:

 Virtual care flyer.

Video: Accessing Virtual Care.



Q2

Postpartum care

Description/call to action

Encourage mothers to schedule and attend postpartum follow-up appointments to ensure their well-being.

Purpose

Support mothers in their post-birth care journey by emphasizing the importance of follow-up appointments and ongoing health check-ins.

Suggested broker touchpoint

Promote available resources and remind members to take advantage of postpartum care support.

When requested by member, reference the online member account for information.



Mental health

Description/call to action

Encourage members to access care easily through the plan website.

Purpose

Highlight the mental health benefits available through their plan, including support for stress, anxiety, depression, addiction and more.

Suggested broker touchpoint

Promote awareness and usage of mental health resources available in the member's plan.

Available materials



Content: Member portal flyer and Mental health flyer.



Women's health

Description/call to action

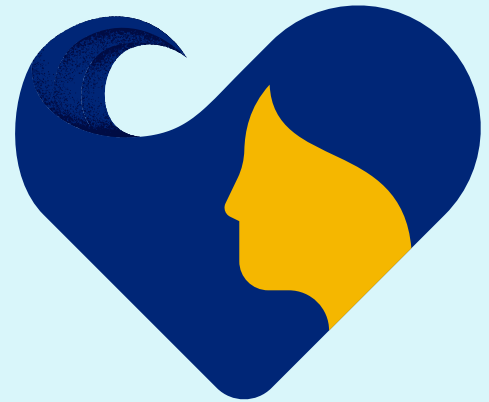
Encourage women to schedule and complete recommended health screenings through targeted messaging.

Purpose

Address gaps in care by advancing women's health, such as mammograms and cervical screenings.

Suggested broker touchpoint

Promote awareness and access to women's preventive screening services.



Diabetes preventative care opportunities

Description/call to action

Schedule a checkup with PCP. Take advantage of the coverage including \$0 covered insulin, \$0 prescription supplies and \$0 coverage on 8 key lab tests and screenings.

Purpose

It's important to know that these diabetes-specific benefits can make a meaningful difference for members – helping them stay on top of their health while minimizing out-of-pocket costs.

Suggested broker touchpoint

Educate on diabetes management tools and low-cost prescription options. \$0 management reference and benefits.

Available materials



Content: Diabetes flyer.



Q3

Pediatric checkup reminder

Description/call to action

Encourage parents to schedule and complete recommended well-child visits for their children.

Purpose

Educate parents on recommended annual screenings for their children to ensure that they are growing and developing as planned.

Suggested broker touchpoint

Reinforce back-to-school checkups and digital tool usage.



Online member account education

Description/call to action

How to navigate the online member account.

Purpose

Check in before the school year starts.

Suggested broker touchpoint

Reinforce back-to-school checkups and digital tool usage.

Available materials

How to portal video.



Dental and vision

Description/call to action

Encourage members to take full advantage of their dental and vision coverage.

Purpose

Help members maximize their dental and vision benefits for better overall health and preventive care.

Suggested broker touchpoint

Promote preventive care services and highlight the value of dental and vision benefits, including \$150 for frames.

Available materials



Content: Vision and Dental flyer and welcome letter.



Q4

Renewal prep begins

Description/call to action

Encourage members to review their plan before Open Enrollment Period (OEP) begins.

Purpose

Engage members early to prepare for the upcoming plan year.

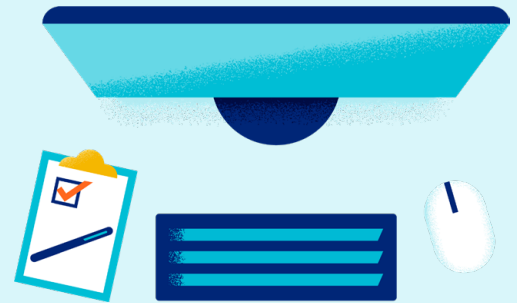
Suggested broker touchpoint

Educate members on plan changes, what's new for 2027, key OEP dates and next steps.

Available materials



Videos: Timeline Renewal Video, Get Ready for OEP Video and PFNY flyer.



Get ready for OEP

Description/call to action

Educate members on key Open Enrollment Period (OEP) dates and deadlines and encourage members to review their current plan.

Purpose

Ensure members understand key dates and deadlines so they don't miss out on 2027 coverage.

Suggested broker touchpoint

Reinforce key renewal deadlines, highlight important plan benefits and help members know what to expect during OEP.

Available materials



Videos: Timeline Renewal Video, Get Ready for OEP Video and PFNY flyer.



Take action to renew

Description/call to action

Encourage members to compare plans, update their application and submit their application by Dec. 15 for coverage starting Jan. 1, 2027.

Purpose

Educate members on how to renew and make the process as clear and simple as possible.

Suggested broker touchpoint

Reach out to your clients to remind them of key dates and deadlines and educate them on making an informed decision for the upcoming plan year.

Available materials



Videos: Timeline Renewal Video, Get Ready for OEP Video and PFNY flyer.



Immunizations

Description/call to action

Messaging will emphasize the importance of preventive care and convenience. This includes highlighting flu shots, routine vaccines and catch-up immunizations as part of overall wellness. Encourage members to find a network provider.

Purpose

Close gaps in care and support value-based care goals by promoting preventive services.

Suggested broker touchpoint

Share seasonal reminders (flu season) and explain no-cost preventive visits.



