



Health Assessment (HA) Field Sales Agent FAQ

General

What is a health assessment?

A health assessment is a short survey of 8 to 20 questions that helps the health plan assess a member's needs by asking a series of health-related questions. Information from the health assessment is used to create an individualized care plan that is shared with the member's providers.

Why should I help a member submit a health assessment?

As an agent, you are often the first interaction a member has with UnitedHealthcare. When you assist a member in completing a health assessment, you strengthen the relationship with the member by encouraging them to take this first step toward taking full advantage of their health care plan.

Eligibility

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

To be paid for completing a health assessment, you must be eligible, the member must enroll in an eligible plan, the enrollment application must be completed in LEAN, and the health assessment must be completed timely in LEAN.

Agent Eligibility – you must be licensed, appointed, and product certified. In other words, if you are not eligible for payment for the enrollment application, you are not eligible for payment for the associated HA. Remember, LEAN does not prevent you from completing an enrollment application for which you are not certified.

Plan Eligibility – the consumer must be enrolling in an eligible MA/MAPD, Dual SNP (DSNP), or Chronic SNP (CSNP). Ineligible plans include those deemed non-commissionable at the time of enrollment and any stand-alone PDP, Medicare Supplement, or ISNP plan. LEAN will prevent you from taking an HA for an ineligible plan or plan type

Other Eligibility Criteria – the enrollment application and health assessment must be submitted via LEAN. You must submit the health assessment within 3 calendar days of the consumer signature date on the enrollment application. The enrollment application must be approved and the consumer enrolled (i.e. accreted application). Health assessments associated with a denied, cancelled, or withdrawn enrollment application are not eligible for HA payment.

Training

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

No. In place of training, an attestation will appear at the beginning of each health assessment you start in LEAN. You must read and acknowledge each statement before you will be able to begin answering the health assessment questions.



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Completing the Health Assessment

When may a health assessment be completed?

The health assessment must not be completed until the consumer has signed the enrollment application in LEAN. To receive payment for an eligible health assessment, it must be completed within three calendar days of the consumer's enrollment application signature date.

How do I complete a health assessment in LEAN?

The entire Health Assessment process is completed in LEAN. Refer to training resources on Jarvis for a tutorial video and job aid for step-by-step instructions for completing an HA in LEAN.

Do I need to complete the attestation each time I complete a health assessment?

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

Does any information entered in the enrollment application get pulled into the health assessment?

Yes. The consumer's first name, last name, date of birth, state, home phone number, and MBI pre-populate from the LEAN 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 health assessment submitted for a member?

You can view the health assessment in My Applications with the completed HA number. The Start HA button will disappear once the health assessment has been completed.

Health Assessment Payment

How will the health assessment payment appear on my commission statement?

If you are a non-employee/contracted agent, you will find health assessment payments on the adjustment tab of the Excel version of your commission statement. If you are an ISR, you will find HA payments through the DOCK in your All Paid File.

How frequently will health assessment payments process?

Payments for plans with 1/1/20 effective dates will be processed the last week of February 2020. For plan effective dates on or after 2/1/2020, payments will be paid monthly (the month after the effective date).

I haven't received payment for a health assessment submission, what should I do?

Verify that all eligibility criteria were met to receive payment for completing a particular health assessment. The health assessment payment for 1/1/2020 plan effective dates will be processed in late February 2020 and for plan effective dates on or after 2/1/2020, payments will process monthly (the month after the effective date, for example, 2/1 effectives will be paid in March). Please wait one commission payment statement past when you were expecting payment before contacting the PHD for assistance.



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

Health assessment 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 health assessment payment for health assessments completed by the assignor.

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

Yes, for non-employee, contracted agents, health assessment payments are considered revenue and are reported on the 1099 for the year in which it was paid. For employee agents, the HA is considered income and is reported on the W2 for the year in which it was paid

Troubleshooting

If you have any questions about using LEAN, see the LEAN User Guide (Jarvis>Knowledge Center>Systems & Technology>Print Materials)

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.