



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 portal for registration

Purpose

Welcoming the member and demonstrating ease of portal use

Suggested Broker touchpoint

Review the registration steps and help members register

Available Materials



Video: Account Registration, Finding a PCP, Four simple ways to pay, Terms to know, Accessing Virtual care, Urgent Care vs ER



Content: Welcome, Whats next flyer



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 stay in network and to take action by choosing their PCP through the designated portal. Earn Rewards for the members, step one

Purpose

Ensure every member has a PCP on file and understands the steps required to make their selection.

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



Video: How to Portal, What's in my plan, Getting care from a specialist, Staying in network



Content: Member Portal flyer and Rewards 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 check up with PCP. Take advantage of the coverage including \$0 covered insulin, \$0 prescription supplies, and \$0 coverage on eight 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

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



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 portal 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

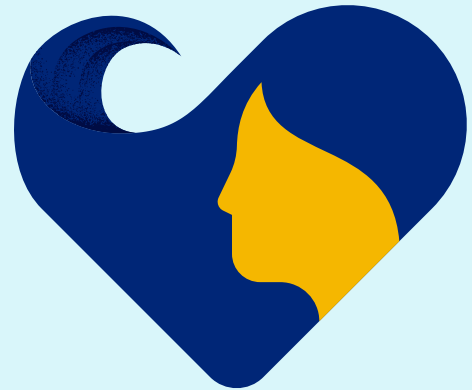
Encourage women to schedule and complete recommended health screenings through targeted messaging.

Purpose

Address gaps in care by promoting preventive screenings for mammograms and cervical cancer.

Suggested Broker touchpoint

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



Diabetes Preventive Care Opportunities

Description/Call to Action

Promotion of Diabetes Preventive Care Opportunities include an overview of available diabetes tests

Purpose

Emphasis on consulting with their PCP on effective management of diabetes and pre-diabetes

Suggested Broker touchpoint

Encourage pediatric visits and diabetes screenings

Available Materials



Content: Diabetes flyer



Q3

Pediatric Checkup Reminder

Description/Call to Action

Back to school check ups

Purpose

Check in before the school year starts

Suggested Broker touchpoint

Reinforce back-to-school checkups and digital tool usage



Portal education

Description/Call to Action

How to navigate the patient portal

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/flyer



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.

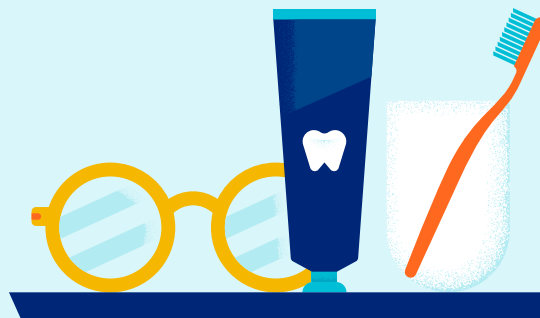
Suggested Broker touchpoint

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

Available Materials



Content: Vision and Dental flyer



Q4

Renewal prep begins

Description/Call to Action

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

Purpose

Engage members early to prepare for the upcoming plan year.

Suggested Broker touchpoint

Educate members on any plan changes and key renewal timelines.

Available Materials



Video: Get Ready for OEP – PFNY flyer



Open Enrollment Period (OEP) Reminders

Description/Call to Action

Encourage members to review their current plans to simplify the OEP process.

Purpose

Raise awareness about the upcoming Open Enrollment Period and help members prepare effectively.

Suggested Broker touchpoint

Reinforce key renewal deadlines and highlight important plan features.

Available Materials



Video: Get Ready for OEP – PFNY flyer



Take Action to Renew

Description/Call to Action

Encourage members to review their plans now to avoid unexpected cost changes later.

Purpose

Educate members on year-over-year plan changes to help them make informed decisions.

Suggested Broker touchpoint

Reinforce renewal deadlines and highlight key plan updates.

Available Materials



Video: Get Ready for OEP – PFNY flyer



