



# 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

## Sanitas welcome/activation journey

### Description/call to action

Onboard Sanitas members to their new plan, meet their Sanitas PCP and encourage engagement with the plan. UHC sends an email informing members when they have been assigned a Sanitas PCP and clinic location as well as next steps to schedule an appointment.

### Purpose

Welcome members to drive their first visit with Sanitas and educate on how Sanitas is their first stop for network care. We also want to encourage members to engage with their plan, benefits and close gaps in care.

### Suggested broker touchpoint

Help members understand their new plan and ensure understanding that Sanitas is their primary care provider with this new plan design, and other providers they may have used in the past are not in this plan's network.

### Available materials



**Video:** What is VBC?  
**Flyer:** Sanitas Partnership FAQ; Sanitas Clarity Guide.



**Onboarding:** Final Binder Payment.

Once we receive the enrollment file, Sanitas sends a Welcome stream helping each member to navigate the services:

**Touch 1 - Initial Welcome - CTA Book a visit.**

**Touch 2 - Access to care (including link to Sanitas care team per location), Chronic Condition program, connection to community, etc. - CTA - Meet the team; Book a visit**

**Touch 3 - What to expect from care at Sanitas - CTA Book a visit**

**Touch 4 - About mySanitas app benefits- CTA Download the app**

**Touch 5 - More about special care programs (Chronic Care Management) - Book a visit to apply**

**Touch 6 - Better Health for a Stronger Community - CTA book a visit.**

## 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 Sanitas members, accessible via the mySanitas app or portal.

### Purpose

Drive engagement with Sanitas as the primary care provider even for virtual care. Enhance member satisfaction and retention by offering flexible, digital-first care. Support value-based care (VBC) by simplifying access and promoting proactive health management. Reinforce UHC + Sanitas partnership as a seamless experience for members.

### Suggested broker touchpoint

Share FAQs and benefit guides.

**Available Materials:** Virtual care flyer.



**Video:** What's in my plan Sanitas.



## Post ER care

### Description/call to action

Encourage members to utilize same day sick care at a Sanitas clinic if same day care is needed. And go to ER in case of emergency.

### Purpose

To inform members who recently visited the ER about their options for follow-up care, ensuring they have access to the necessary resources and information to continue their recovery and manage their health effectively.

### Suggested broker touchpoint

Not recommended for broker communication. Just an FYI for UnitedHealthcare communication this quarter.

### Available materials

N/A



## 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 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.

Through the Sanitas chronic condition management program, care coaches and care educators will help members implement a personalized care plan.



# Q2

## Sanitas engagement

### Description/call to action

Additional communications to drive visits with Sanitas and gap in care reminders.

### Purpose

Reinforce the value of the plan with members post onboarding to seek preventive care and to close gaps in care. Hispanic engagement and relationship building.

### Suggested broker touchpoint

Take a more informational approach with members. Help answer plan questions, encourage PCP visits and account activities.

### Available materials



#### Engagement:

- Virtual Care
- Avoid Surprise Costs



## 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 member online account for information.



## Mental health

### Description/call to action

Encourage members to access care easily through the plan website and teach people to manage stress, burnout, healthy decision making and balance life and work.

### 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:** Be Well flyer, Member Portal flyer and Mental health flyer.

The BeWell program provides comprehensive mental health services by a multidisciplinary team who helps people achieve their autonomy, quality of life, and optimal social integration.

#### Did you know?

1 in 5 people experience a Mental Health condition?

#### Why is the BeWell Program unique?

- Accessible: We are located in your Primary Care Office
- Affordable: Our program is less expensive than traditional models
- Less Stigmatizing: We focus on prevention and promotion of wellness

# 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.

**Note:** pediatric well child visits are not available for members under 3 at Sanitas clinics.

## Available materials



**Content:** Diabetes flyer.



# Q3

## Sanitas gap in care reminders/Sanitas care reminders

### Description/call to action

Engage in specific follow-ups. Schedule preventive care and screenings.

### Purpose

- Emphasize the importance of high needs patients and any patient with recent ER/IP visits to follow up with PCP for care management
- Highlight the importance of taking care of their health and drive visits

### Suggested broker touchpoint

- Encourage necessary checkups
- Encourage taking advantage of plan benefits like cancer screenings, well child visits and flu shots
- Encourage members to call the Sanitas scheduling line for appointments: **1-844-275-8748**

### Available materials



**Content:** Diabetes flyer



Encourage members to stay on the look out for Sanitas emails with care gap reminders, and monthly newsletter with relevant health information and recommendations.

## We're here to help

### Description/call to action

The objective of this campaign is to reinforce our commitment to being a trusted partner in our members' healthcare journey by reminding them of the comprehensive support and resources available to maximize their health insurance benefits and care. This email aims to enhance member awareness of the tools, services, and personalized assistance we offer, ultimately improving their overall health outcomes and satisfaction with our health insurance plans. Start chatting now.

### Suggested broker touchpoint

TBD

### 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



## Member appreciation

### Description/call to action

Learn more.

### Purpose

To celebrate members' membership in the healthcare plan, reinforcing UHC as a trusted partner in their healthcare journey by highlighting the benefits and support available to them, fostering a sense of community and brand affinity.

### Suggested broker touchpoint

TBD

### Available materials

TBD



## Well child program

### Description/call to action

Increase awareness for individuals ages 0-21, close gaps in care measures, and encourage members to schedule a visit.

### Purpose

Drive preventive care engagement for families with children/close gaps in care.

### Suggested broker touchpoint

Position well-child visits as a covered preventive benefit with no cost to members. Highlight family-friendly features like same-day appointments and bilingual care.

### Available materials

TBD



## 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.

### Available materials

TBD



## Cardiometabolic testing and education

### Description/call to action

Encourage members to schedule screenings and preventive care.

### Purpose

To inform members that getting regular screenings for heart and metabolic health can help catch potential issues early, empowering them to take control of their well-being and avoid more serious health problems down the road.

### Suggested broker touchpoint

Reminder to their book of business during OEP pre-warm reach out.

### Available materials

TBD

Add information about Sanitas care coaches and personalized care:

- In- person or virtual visits
- Ongoing follow up calls
- Group and 1:1 education activities



# 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



## Get ready for OEP and renewal

### Description/call to action

Engage in specific follow-ups and encourage members to prepare for the Open Enrollment Period (OEP).

### 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



**Content:** Sanitas Why Enroll flyer



