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

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