

New premier client onboarding = earlier engagement = more satisfied clients



Introducing a new welcome experience for clients and easier first-visit scheduling. Put your clients ahead of the rush at the start of the year so they get priority scheduling. This will also help lower the number of service calls and improve client retention by making sure your clients get appointments.

You can complete premier client onboarding in four easy steps.



1 Visit optum.com/patientearlyaccess or scan the QR code on the right. The QR code and link can be found on other marketing materials and landing page click-throughs.

2 Read this disclaimer aloud to your client before starting the form. (It's also reprinted on the site.)

“By allowing me to complete this contact form, you authorize me, (broker name) to disclose your name and contact information to Optum (state) to establish your future patient/doctor relationship with an Optum provider. **You understand and agree that:**

- This authorization to provide us this information is voluntary.
- You may not be denied treatment, payment for health care services, or enrollment or eligibility for health care benefits if you do not agree to this disclosure.
- This authorization will expire one year from today (event or time, once they have their first visit with their doctor).
- You may revoke this authorization at any time by notifying me (broker). However, the revocation will not have an effect on any actions taken prior to the date your revocation is received and processed.”

3 After you've read the disclosure to your client, you can complete the form.

4 Let your clients know what to expect next.

- A welcome email will arrive shortly.
- A phone call will follow to schedule their first visit.



Questions?

Please reach out to your local marketing contact.

The screenshot shows the 'Optum and WellMed early access' contact form. It includes a search bar, navigation menu, and a form with the following sections:

- Optum and WellMed contact form:** A paragraph explaining the purpose of the form.
- Please read to your client before completing:** A bolded instruction.
- You understand and agree that:** A list of four bullet points detailing the terms of the authorization.
- Disclaimer:** A paragraph stating that by providing information, the user acknowledges the email may contain protected health information.
- Please complete the below information:** A section for personal details including First name, Last name, Email, Phone, and ZIP code.
- Communication preference:** A dropdown menu for 'Email' and a checkbox for 'Send text to cell'.
- Occupational information:** Fields for 'Occupation' and 'PCP name'.
- Other:** A dropdown menu for 'Other' and a checkbox for 'Send text to cell'.
- Submit:** A blue button at the bottom right.

Thank you. We look forward to connecting with your clients.

Optum® and OptumCare® are trademarks of Optum, Inc.
© 2021 Optum, Inc. All rights reserved. 4862191 08/21

