

## **Agent Assisted Health Assessment (HA) Process (update effective 02/24/2020)**

Field agents (does not include eAlliance call centers unless expressly permitted) may assist a consumer in completing a Health Assessment (HA) at the time of the sale. Refer to the Health Assessment (HA) Payment Program section for HA payment program requirements. To assist a consumer to complete an HA:

- A field agent may only complete an HA for a consumer enrolling in a commission/compensation-eligible Medicare Advantage (MA) plan. A Telesales agent (i.e. eAlliance call centers) may only complete an HA for a consumer enrolling in a Dual or Chronic Specials Needs Plan (SNP).
- The agent must not complete an HA prior to or more than three calendar days after the consumer signature date on the enrollment application.
- The agent must obtain the consumer's consent to complete the HA. The agent must not require or pressure a consumer to complete an HA at the point of sale.
- The agent must complete the enrollment application and the HA in LEAN unless a different method is preapproved\*. eAlliance that do not use LEAN, must use methods pre-approved by UnitedHealthcare for HA data collection and submission. A field agent must not complete a paper HA (or any other HA format) with a consumer and transfer the information to the LEAN HA.
- The agent must not share their LEAN log-on credentials with another individual or have another individual complete an HA on the agent's behalf.

\*Once HA functionality is available in LEAN (based on agent channel), the agent is no longer permitted to use the third-party HA site to complete an HA.