

Agent conversation guide





Dear agents,

At CenterWell, we know seniors. And we know that aging can come with unique and complicated challenges. That's why every aspect of our care delivery model was designed with this group in mind. Our primary care that is focused on seniors is transforming healthcare for members of the Medicare-eligible population.

You have a role in our community.

We rely on outstanding agents like you to help your clients understand what to look for when choosing a physician and care center to meet their needs. Part of that is understanding that health is more than what happens in a clinical setting—it occurs where patients live and socialize, too.

So, we're dedicated to fostering every patient's physical, emotional and social wellness. And we're committed to providing you the tools and resources to understand how CenterWell's model of care can support your clients on their health journey.

This conversation guide is just one resource we're making available to you.

It includes the details of our care philosophy and our centers, and is designed to help ensure meetings with your clients are informative, accurate and compliant. We hope it has great value for you.

Thank you for working together with us to help seniors live happier and healthier every day.

With gratitude,
The CenterWell team

The golden rule

Any provider discussion should **always** be in the best interest of the beneficiary.



Research shows that most seniors don't take decision-making lightly.¹ As you likely know from personal experience, they view each purchase as a commitment, built on trust. Marketing to this population is a big opportunity—and well worth the effort, because 10,000 Baby Boomers become eligible for Medicare every day.² They control more than 70% of the nation's disposable income.³

When it comes to their healthcare, connecting them with senior primary care could positively impact their quality of health—and life. As an agent, you may find that your Medicare clients are happier seeing a physician and care team that specializes in the unique needs of seniors. Patients who are happy with the quality of their healthcare are typically less likely to switch physicians year over year; therefore, making your job easier. It's truly a win-win situation.

There are many ways in which primary care (and the importance of a primary care physician) may come up in your conversations with clients. In this guide, you will find our suggestions for how to discuss CenterWell in those instances. However, be sure to put your personal spin on the conversation and remember our golden rule.

Good luck!

¹<https://www.entrepreneur.com/article/274727>

²<https://www.forbes.com/sites/greatspeculations/2018/06/21/social-security-feels-pinch-as-baby-boomers-clock-out-for-good/>

³<https://www.forbes.com/sites/forbescommunicationscouncil/2017/09/26/five-things-you-need-to-know-about-marketing-to-baby-boomers/>



Step one: Level-set on primary care

During a discussion with a client, if you determine that he or she has a primary care physician (PCP), politely ask probing questions

Relationship-related

- Does your client have a good relationship with his/her PCP?
- Does your client feel listened to? Respected? Valued?
- Does the PCP know your client by name? Does the office staff?
- Is the PCP familiar with your client's health history? Lifestyle? Goals?

Logistical

- Does the PCP specialize in treating seniors?
- Is the clinic conveniently located? Is parking easily accessible?
- Are same- or next-day appointments available?
- Does your client experience long wait times?
- Are appointments long enough to get all of your client's questions answered?
- Is your client able to get lab tests or screenings performed on-site?
- Is there a pharmacy on-site?
- Are community events offered?

If the client does not have a PCP or is unsure if they have one, this is an opportunity to advise your client on the role of a PCP

- A PCP is generally the doctor a patient sees first for most health concerns (emergencies excluded).
- PCPs consult with other doctors and healthcare providers about a patient's care plan, providing specialist referrals as needed. This often saves the patient time and helps to navigate health plan benefits to ensure the patient's care is coordinated and organized.
- PCPs provide preventive care strategies to keep patients healthy, reduce their risk of illness and keep them feeling their best.
- PCPs are especially valuable to seniors, who generally have more—and more complicated—health challenges than other populations.



Step two: Define our approach to senior-focused primary care

Determine if your client is familiar with CenterWell and our care delivery model. Depending on the response, explain or refresh them on what sets us apart from other PCPs.



Caring

- Doctors who listen with compassion
- A dedicated care team
- Personalized care plans
- Coordinated referrals



Focused

- Shorter wait times
- Unrushed appointments
- Proactive care and follow-up
- Medicare Advantage plans accepted
- Dedication to preventive and quality care



Accessible

- Same-day appointments
- Family-friendly exam rooms
- Wider doors and hallways and non-slip floors
- Exam chairs that rise and lower to accommodate mobility changes

- 24/7 phone access to care team
- Online medical records
- Live video visits (TeleVisits)



Convenient

- Conveniently located centers
- On-site pharmacy*
- Convenient or free parking*
- On-site lab
- On-staff clinical pharmacist
- Coordination with Health Plan transportation**
- Convenient specialty network



Connected

- Extensive community partnerships
- On-site community center
- Virtual education opportunities
- Year-round social programming

*available at some locations

**when needed



Step three: Encourage a “try before you buy” mentality

CenterWell encourages everyone to tour our center and meet our doctors. We believe just one visit will show what sets us apart.

Your clients can book these by calling any center. Caregivers, friends and family members are always welcome.

Additionally, our centers host frequent open houses.

Your clients can tour the facilities, meet the staff and enjoy refreshments.

Date and time information is listed on both our website and Facebook pages.

Finally, events hosted in CenterWell activity centers are typically free and open to the public. Local listings are available in each of our centers on a monthly calendar and on our website and Facebook pages.

Your clients don't want to commit to a scheduled event? No problem!

Tell them they can stop by any center to ask questions and see the facility and meet the staff at their convenience. We're open 8 a.m. – 5 p.m., Monday – Friday.



Want to learn more about CenterWell?

Visit our website CenterWellPrimaryCare.com/agents.

Sample conversations



Example #1

If your client has a PCP who is in network, here is an example of how the conversation could go:

"Thank you, Mrs. Smith, for letting me know who you have used as your PCP in the past. I have confirmed that Dr. Jones is, in fact, in the network of the MA plan you are enrolling in, so you can absolutely designate Dr. Jones as your PCP. Before I fill that in on your enrollment form, let me just make you aware that your MA plan has identified certain providers in their networks who are performing at high levels when providing care to their members. For example, these providers are performing particularly well with ensuring that their patients are receiving appropriate and timely preventive services. If you are willing to try a different PCP or if, for example, your current PCP is nearing retirement and you are soon going to be faced with having to begin using a different PCP, you might want to consider going ahead now and selecting one of these PCPs that your MA plan has highlighted for your consideration. Would you like me to find ones who are located near you?"

If **"Yes,"** provide your client a selection of the PCPs in the area for them to choose from.

If **"No,"** insert Dr. Jones into the enrollment form as the PCP for Mrs. Smith.

Example #2

If your client does not have a PCP and is open to your assistance with finding one, here's an example of what you could say:

"Okay Mrs. Smith, we're at the point of needing to list the name of the PCP you would like to plan on having as your PCP on the enrollment form. You have asked for my help in selecting someone. What I can tell you is that it needs to be totally your choice. I want to be sure that you select a PCP who you want. What I can tell you is that there are particular PCPs that your MA plan has identified who are performing at high levels when providing care for their members. For example, these providers are performing particularly well with ensuring that their patients are receiving appropriate and timely preventive services. Would you like us to focus on this particular list of PCPs for you to find one to select?"

If **"Yes,"** show the various PCPs who have offices in areas near your client's place of residence.

If **"No,"** use the Physician Finder tool to show your client all PCPs available in the network or, if desired, only those within a certain mile radius from their residential ZIP code.



Learn more about the CenterWell difference
CenterWellPrimaryCare.com/agents

