

Help On Demand for Agents and Brokers

September 27, 2018



Intended Audience

The intended audience for this webinar is agents and brokers who are interested in participating in Help On Demand for plan year (PY) 2019.

Please be advised that this is not an open press call. Members of the press or a media outlet should disconnect the call at this time and contact the Centers for Medicare & Medicaid Services (CMS) Press Office for further information.

Disclaimer

The information provided in this presentation is intended only as a general informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This presentation summarizes current policy and operations as of the date it was presented. Links to certain source documents have been provided for your reference. We encourage audience members to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information about the requirements that apply to them.

This document generally is not intended for use in the State-based Marketplaces (SBMs), but some of the material in it might be relevant if you are in a state with an SBM that is using HealthCare.gov for eligibility and enrollment. Please review the guidance on our Agents and Brokers Resources webpage (<http://go.cms.gov/CCIIOAB>) and Marketplace.CMS.gov to learn more.

Unless indicated otherwise, the general references to “Marketplace” in the presentation only include Federally-facilitated Marketplaces (FFMs) and State-based Marketplaces on the Federal Platform (SBM-FPs).

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Webinar Agenda

- What is Help On Demand?
- Participate in Help On Demand
- Register for Help On Demand
- Update Your Help On Demand Profile
- Working with Consumers Using Help On Demand
- Best Practices
- Help On Demand Resources

Help On Demand for Agents and Brokers



What is Help On Demand?

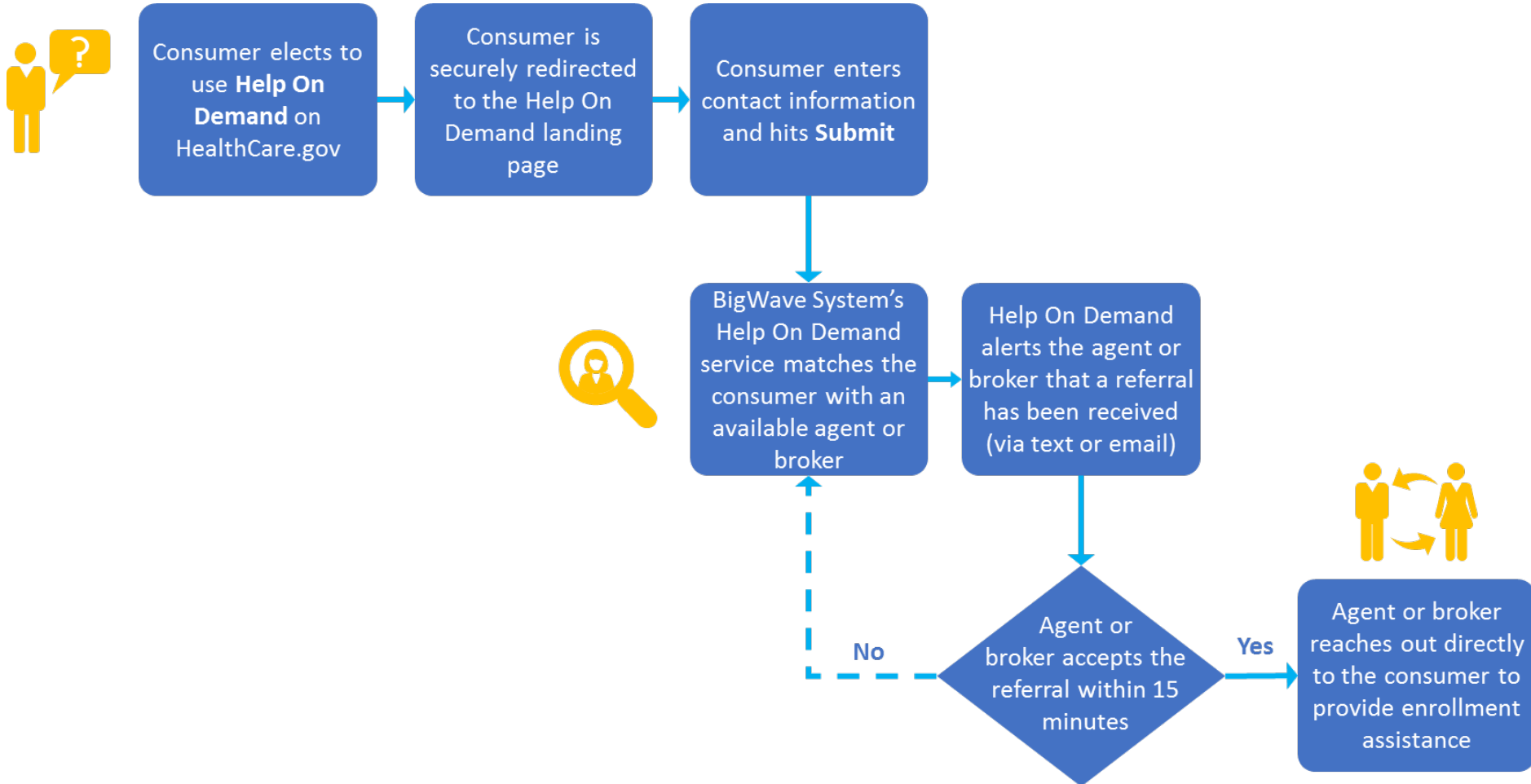
What is Help On Demand?

Help On Demand is a real-time consumer assistance referral system that connects individuals with Marketplace-registered, licensed agents and brokers in their area who can provide immediate assistance with Marketplace plan selection and enrollment.

The Help On Demand technology is hosted by BigWave Systems.

As an agent or broker, you must complete Marketplace training and registration for PY 2019 to be eligible to participate in Help On Demand. You must also be licensed and hold a valid health line of authority in the state(s) where you are assisting consumers with enrollment in Marketplace plans.

How Does It Work?



Benefits of Help On Demand

Consumers can connect quickly with agents and brokers near them. Consumers who request assistance through Help On Demand are matched with an agent or broker who generally accepts their request for assistance in less than 15 minutes.

Agents and brokers can maintain a flexible schedule. Agents and brokers can set standard operating hours on Help On Demand, or sign on whenever they are available to help consumers, 24 hours a day, 7 days a week.

Agents and brokers can avoid unnecessary costs. Unlike other industry systems, Help On Demand is provided to consumers and agents and brokers at no cost.

Improvements for Plan Year 2019

- The Help On Demand system was first available for consumers in the fall of 2017.
- Approximately 5,300 agents and brokers participated during the last Open Enrollment period.
- CMS feedback from these early users led to improvements to the end-user experience for PY 2019:
 - More actively highlight Help On Demand to consumers on HealthCare.gov
 - Implement technical enhancements to improve functionality for agents and brokers
 - Provide enhanced training and resources to maximize agent and broker participation



62% of agents and brokers felt that Help On Demand helped them maximize enrollments during PY 2018



89% of agents and brokers are likely to participate in Help On Demand for PY 2019

Agent and Broker Testimonials



I absolutely love Help on Demand. Customers love the personalized service, I love the new leads and business, and most leads that I have had, I would say 90% lead to me helping them with their HealthCare.gov application.

It was easy to use and I was able to expand my reach to help others that would not have found me otherwise.

The program was very helpful and I hope to continue my participation. THANK YOU.

This is a great option for the consumer and the agent. They need help and I can provide it.

I believe that the system will only get better and I think it had a great start.

IT IS OPPORTUNITY UNLIMITED!!!!!!!!!!



Help On Demand for Agents and Brokers

*Participate in
Help On
Demand*



Get Ready to Participate in Help On Demand

In order to participate in Help On Demand, you must:

- Complete Marketplace registration and training for PY 2019 at <https://portal.cms.gov>.
- Ensure you have an active state license and health line of authority for the state(s) where you plan to offer assistance with enrollment in Marketplace plans.
- Confirm that your National Producer Number (NPN) is listed on the Agent and Broker FFM Registration Completion List for PY 2019 at: https://data.healthcare.gov/ffm_ab_registration_lists.
- You also can elect to display your contact information in your Marketplace Learning Management System (MLMS) profile. If you select “I don’t want my contact information displayed and do not want to participate in Find Local Help or Help On Demand,” you will NOT be able to participate in Find Local Help or Help On Demand until you update your settings in the MLMS.

Complete Help On Demand Training

Once you register with the Marketplace and complete the required training for PY 2019, you will be ready to complete training for Help On Demand!

Simply complete these three steps:

- Complete the required, self-paced Help On Demand training at <http://training-help-on-demand.ardx.us/>.
- Certify your completion by filling out and submitting the last slide of the training with your:
 - Name
 - Email address (be sure to use the same email address you used to set up your MLMS profile)
 - NPN
- After you complete training, you will receive an email from BigWave Systems to activate your Help On Demand account.

Note: If you actively participated in Help On Demand during PY 2018, you are not required to retake Help On Demand training. Your account is active and will remain active as long as you complete PY 2019 Marketplace training and registration with CMS.

Activate Your Help On Demand Account

After you have successfully completed training, you must register with Help On Demand, which is powered by BigWave Systems.

- BigWave Systems will send you an email invitation from noreply@bigwavesystems.com to the email address listed in your MLMS profile.
- This email will contain a unique link you can use to activate your Help On Demand account.
 - The link expires after 48-hours, so be sure to act fast!
 - If you did not receive an email invitation after completing the Help On Demand training, check your spam folder to make sure it was not filtered by your email provider.
- Select the link provided in the email to activate your account and follow the instructions to begin your registration.

Note: If you actively participated in Help On Demand during PY 2018, you do not need to reactivate your Help on Demand account. Your account is active and will remain active as long as you complete PY 2019 Marketplace training and registration with CMS.

Help On Demand for Agents and Brokers

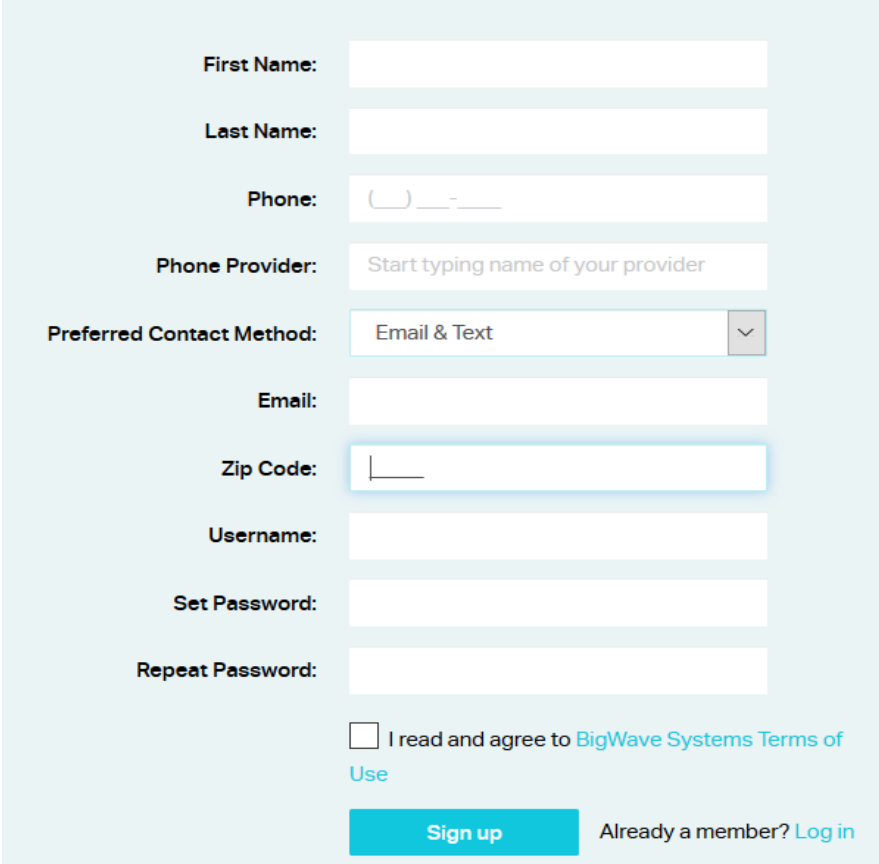


*Register for
Help On
Demand*

Register for Help On Demand

Once you receive access to Help On Demand, you will need to complete the registration page.

Once you have entered your information, review the BigWave Systems Terms of Use and select Sign-Up.



The registration form is displayed on a light blue background. It contains the following fields and elements:

- First Name:** A text input field.
- Last Name:** A text input field.
- Phone:** A text input field with a placeholder for a phone number format: () - .
- Phone Provider:** A text input field with the placeholder text "Start typing name of your provider".
- Preferred Contact Method:** A dropdown menu currently showing "Email & Text".
- Email:** A text input field.
- Zip Code:** A text input field.
- Username:** A text input field.
- Set Password:** A text input field.
- Repeat Password:** A text input field.
- ☐ I read and agree to [BigWave Systems Terms of Use](#)
- Sign up** (a blue button)
- Already a member? [Log in](#)

Register for Help On Demand

- Setting your Preferred Contact Method is an important step. It determines how you will receive referral notifications from Help On Demand.
- There are three (3) options:
 - Email & Text
 - Email & App Notification
 - Email Only
- Due to the fast-paced nature of Help On Demand, you are strongly encouraged to **receive text messages or app notifications in addition to emails**. Receiving notifications via email only can cause delays and lost referrals.

Register for Help On Demand

BigWave Systems will display a notification that your registration is complete.

You will also receive an email confirming your access to BigWave Systems.

Be sure to save this email, which contains the link to log into BigWave Systems: www.bigwavesystems.com.

Your registration is almost complete!

Thank you for registering with BigWave Systems.

In order to begin accepting Referrals, log into www.BigWaveSystems.com to read and accept the terms of use.

If you have selected to receive text message notifications from BigWave Systems, a test text message was sent to the phone number you provided during registration. Please double check that you have received the text message.

Next, select the appropriate mobile platform to download the BigWave Systems mobile application. Otherwise select the "Login and Continue" option.

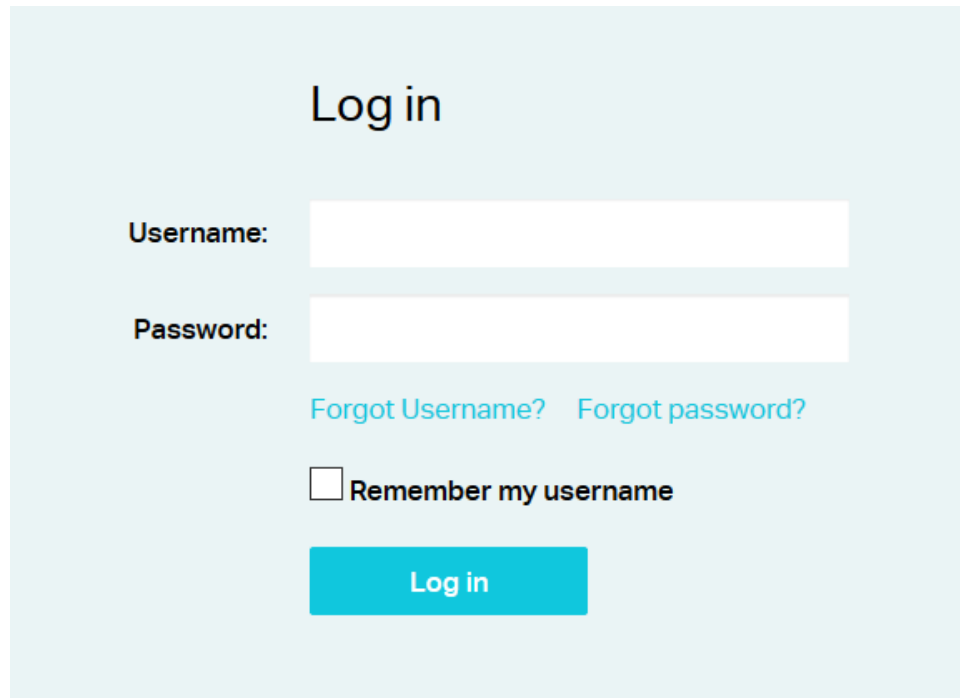
iPhone

Android

Login and Continue

Log into Help On Demand

Log into Help On Demand through the BigWave Systems website, www.bigwavesystems.com, with your username and password.

A screenshot of the login page for BigWave Systems. The page has a light blue background. At the top, the text "Log in" is centered. Below it, there are two input fields: "Username:" and "Password:". To the right of the "Password:" field, there are two links: "Forgot Username?" and "Forgot password?". Below these links is a checkbox labeled "Remember my username". At the bottom, there is a blue button with the text "Log in".

Log in

Username:

Password:

[Forgot Username?](#) [Forgot password?](#)

☐ Remember my username

Log in

Accept Help On Demand Terms of Use

**Help On Demand
Registration**

You have been invited by Help On Demand to manage Referral using BigWave Systems.

To accept, please read Help On Demand Terms of Use below and choose Accept.

Proficient Languages: English ▼

☐ I have read and agree to [Help On Demand's Terms of Use](#)

Accept Decline

Overview **Terms of Use** **Privacy and Security Policy**

Big Wave Systems provides services to insurance brokers, insurance carriers and insurance exchanges. By using the tabs above on this Privacy section of our Website, you will find our policies and agreements governing how we, and our affiliates and subsidiaries, handle the personal information that we receive when you use our Website.

Help On Demand for Agents and Brokers



*Update Your
Help On
Demand
Profile*

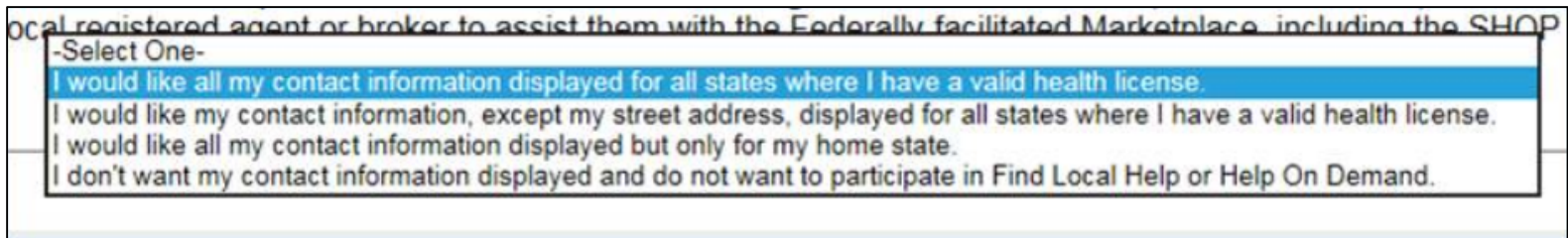
Update Your Help On Demand Profile

After completing Help On Demand registration and accepting the terms of use, be sure to update your profile including:

- Contact information
- Any languages you speak
- States where you would like to receive referrals
- Hours of availability

Update Your State Preferences

In the MLMS, you have the following four options to display your contact information:



The screenshot shows a dropdown menu with the following options:

- Select One-
- I would like all my contact information displayed for all states where I have a valid health license.
- I would like my contact information, except my street address, displayed for all states where I have a valid health license.
- I would like all my contact information displayed but only for my home state.
- I don't want my contact information displayed and do not want to participate in Find Local Help or Help On Demand.

- In the MLMS, you have the option of displaying your contact information for Find Local Help and Help On Demand in **all HealthCare.gov states where you have a valid license (options 1 and 2 above)**.
- You can also choose to display your information for your **home state only (option 3 above)**.
- If you choose option 4 above, you will **NOT** be able to participate in Find Local Help or Help On Demand until you update your settings in the MLMS.

Update Your State Preferences

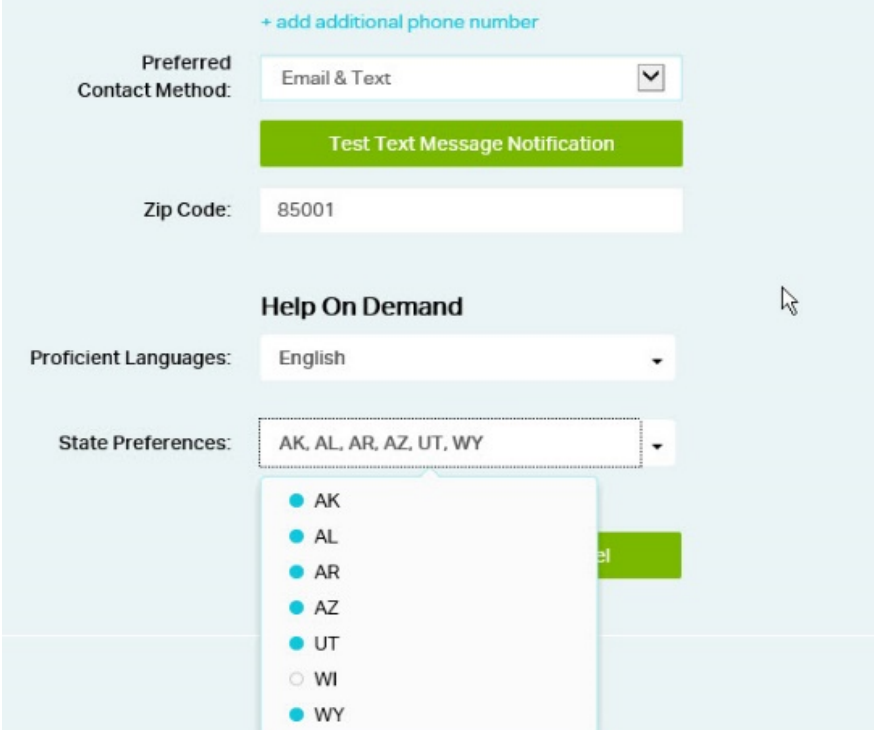
If you chose to display your information in all HealthCare.gov states where you hold a valid license in your MLMS profile (**Option 1 or 2 in the previous slide**), you have the option of limiting your state preferences in Help On Demand.

This field will default to every HealthCare.gov state where you are currently licensed and have a valid health line of authority.

The screenshot shows a web form for updating state preferences. At the top, there is a link '+ add additional phone number'. Below this, the 'Preferred Contact Method:' is set to 'Email & Text' with a dropdown arrow. A green button labeled 'Test Text Message Notification' is positioned below the contact method. The 'Zip Code:' field contains '85001'. The 'Help On Demand' section includes 'Proficient Languages:' set to 'English' and 'State Preferences:' set to 'AK, AL, AR, AZ, UT, WY'. A dropdown menu for 'State Preferences' is open, showing a list of states with radio buttons: AK, AL, AR, AZ, UT, WI, and WY. The states AK, AL, AR, AZ, UT, and WY are selected with blue radio buttons, while WI is unselected with a grey radio button. A green button is partially visible on the right side of the dropdown menu.

Update Your State Preferences

- However, if you only want to receive referrals in certain states, update your State Preferences using the dropdown.
- Using the customizable **State Preferences** field in your profile, select only the states in which you want to receive referrals.
 - This dropdown menu auto populates itself to include all HealthCare.gov states where you hold a valid license and health line of authority.
 - Select or deselect states to decide where to be active.
- Once you have updated your **State Preferences**, you will only receive referrals from the states you select.



The screenshot shows a user profile form with the following fields and options:

- + add additional phone number** (link)
- Preferred Contact Method:** Email & Text (dropdown menu)
- Test Text Message Notification** (green button)
- Zip Code:** 85001 (text input)
- Help On Demand** (link)
- Proficient Languages:** English (dropdown menu)
- State Preferences:** AK, AL, AR, AZ, UT, WY (dropdown menu with a list of states: AK, AL, AR, AZ, UT, WI, WY)

Set Your Help On Demand Availability

After completing your profile, you must set your availability for Help On Demand. This step is critical for both you and consumers.

Help On Demand provides three different ways for you to set your availability:

- 1) By setting standard **Hours of Availability** for each day of the week
- 2) By allowing you to manually override your schedule using the **Today's Availability** button
- 3) By setting **Extended** or **Indefinite** absences for your time out of the office

The screenshot shows the 'bigwave' logo at the top left. The main heading is 'Availability Settings'. On the right, there is a toggle for 'Today's Availability' which is currently 'On'. Below this is a 'Help with this page' link. A sidebar on the left contains links: 'Manage Referrals', 'View Metrics', 'Export Metrics', 'Profile', and 'Availability Settings' (which is highlighted). The main content area is titled 'Hours of Availability'. It features a 'Timezone' dropdown set to 'Mountain Standard Time'. Below this is a table for setting hours for each day of the week. Each row includes a day selector, 'From' and 'To' time pickers, an 'Add more hours' link, and a 'Closed' checkbox. The 'Closed' checkbox is checked for Sunday and Saturday. At the bottom of the table are 'Save' and 'Cancel' buttons. Below the table is the 'Extended Absence' section, which includes 'From Date' and 'To Date' pickers, a 'My Vacation' toggle (currently 'Off'), and a 'Set me unavailable indefinitely' toggle (currently 'Off'). It also has 'Save' and 'Cancel' buttons. The footer at the bottom left reads '© 2015-2018 BigWave Systems LLC'.

Day	From	To	Add more hours	Closed
Sunday	From	To	Add more hours	<input checked="" type="checkbox"/>
Monday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Tuesday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Wednesday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Thursday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Friday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Saturday	From	To	Add more hours	<input checked="" type="checkbox"/>

Set Your Help On Demand Availability

Set standard hours of availability for each day of the week you are available for referrals.

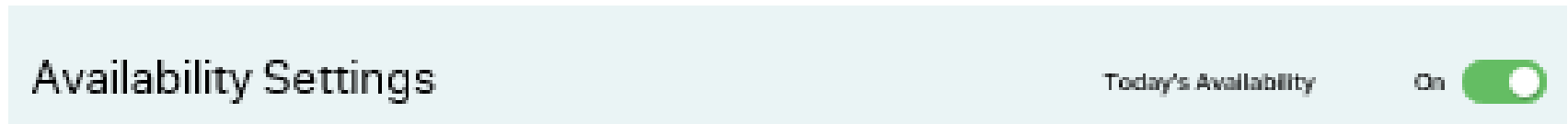
- If you do not make a selection, Help On Demand will default your **Hours of Availability** to Monday through Friday, 8:00 a.m. to 5:00 p.m. The system will detect your time zone automatically.
- **Closed** indicates days of the week you do not want to receive referrals (e.g., Saturday and Sunday).
- The **Add More Hours** feature allows you to choose more time periods to set, for example, if you take a lunch break every day at noon.

The screenshot displays the 'Hours of Availability' configuration interface. At the top, the title 'Hours of Availability' is centered. Below it, the 'Timezone' is set to 'Mountain Standard Time' with a dropdown arrow. The main section lists the days of the week from Sunday to Saturday. Each day has two time input fields: 'From' (labeled 'h:mm') and 'To' (labeled 'h:mm'). To the right of these fields is a link 'Add more hours' and a checkbox labeled 'Closed'. For Sunday and Saturday, the 'Closed' checkbox is checked. For Monday through Friday, the 'From' field is set to '8:00 am' and the 'To' field is set to '5:00 pm'. At the bottom of the form are two buttons: 'Save' (blue) and 'Cancel' (green).

Day	From (h:mm)	To (h:mm)	Add more hours	Closed
Sunday	h:mm	h:mm	Add more hours	<input checked="" type="checkbox"/>
Monday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Tuesday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Wednesday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Thursday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Friday	8:00 am	5:00 pm	Add more hours	<input type="checkbox"/>
Saturday	h:mm	h:mm	Add more hours	<input checked="" type="checkbox"/>

Set Your Help On Demand Availability

Manually override your schedule using the **Today's Availability** button in the top right corner of your screen.



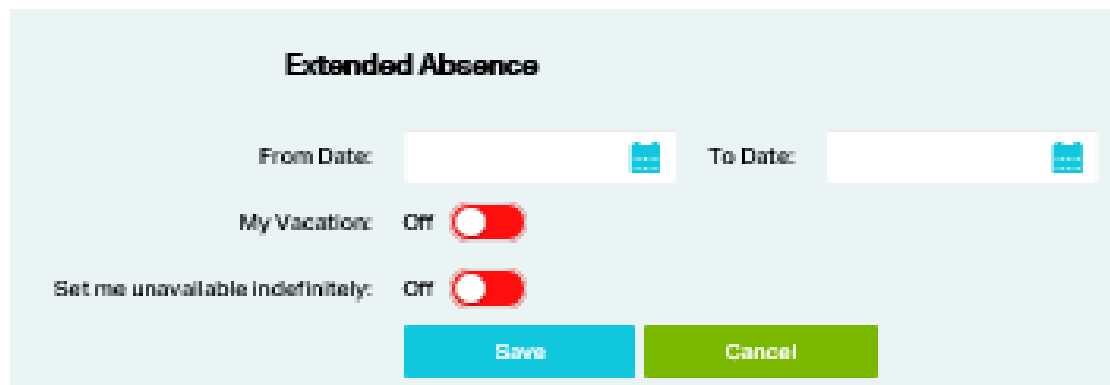
The **Today's Availability** button can override your regular schedule on a temporary basis. Simply move the **Today's Availability** button to green when you want to start receiving referrals and then move it to red when you want to stop taking referrals.

Note: Today's Availability resets the following day to match your standard hours of availability.

Set Your Help On Demand Availability

Mark your calendar as unavailable for extended or indefinite absences for your time out of the office, such as vacation or family leave.

- Use the **My Vacation** button to set your absence for a specified period.
- Use the **Set Me Unavailable Indefinitely** button to set yourself as indefinitely unavailable, located at the very bottom of your screen. This will override all other settings until you manually turn it back to **On**.



The screenshot shows a light blue dialog box titled "Extended Absence". It contains two date selection fields: "From Date:" and "To Date:", each with a calendar icon. Below these are two toggle switches: "My Vacation:" and "Set me unavailable indefinitely:", both currently set to "Off" with red toggle handles. At the bottom are two buttons: a blue "Save" button and a green "Cancel" button.

Help On Demand for Agents and Brokers

*Working with
Consumers
using Help On
Demand*



What Does the Consumer See?

- Consumers can request assistance from a Marketplace-registered agent or broker using the Help On Demand tool available on HealthCare.gov.
- Consumers will be redirected from HealthCare.gov to the Help On Demand landing page, where they will be asked to enter their:
 - Name
 - Contact information
 - Location
 - Language
 - Preferred contact method
- After selecting Submit, they will receive a pop-up notification that an agent or broker will contact them shortly.

Get help now!

A Marketplace-registered agent or broker will contact you in 30 minutes or less* to help you enroll. Agents' and brokers' services are generally free to you. They're usually paid for by insurance companies.

The information you enter below will be sent to a state-licensed agent or broker registered with the Marketplace who will contact you by email, text, or phone to help you enroll.

Do **NOT** click "Submit" if you don't agree to this condition and those listed below.

Please fill in your contact information below.
ALL FIELDS ARE REQUIRED.

First name:

Last name:

Preferred Contact Method:

Cellphone:

Zip Code:

City:

Preferred Language:

* 30-minutes-or-less response time is expected from 9 a.m. – 5 p.m. daily. Weekend, holiday, and after business hours response times depend on availability of agents and brokers. Please review our [Terms of Use / Privacy Policy](#) for information on how Help On Demand identifies the agent or broker who will contact you.

Your phone provider's regular rates for calls or texts apply. Calls or texts may use an automated dialing system, but you'll speak live to an agent or broker. By submitting this form you agree to be contacted by an agent or broker, so you may receive these calls or texts even if you're on the federal or a state "do-not-call" registry.

Don't click "Submit" if you don't agree to all conditions above, as well as those described in our [Terms of Use / Privacy Policy](#).

Using this service is not a condition of obtaining health insurance through the Marketplace. For application assistance without using Help On Demand, go here: <https://www.healthcare.gov/contact-us/>

For a list of Marketplace-registered agents, brokers, and other assisters in your area, go here: <https://localhelp.healthcare.gov>

Working with Consumers using Help On Demand

Receive Referral

After you register with Help On Demand, you are eligible to receive referrals from consumers seeking assistance via Help On Demand.

Depending on your preferred contact method, you will receive a text, email, and/or app notification when you are matched with a consumer.

You only have 15 minutes to respond, so act fast!

Accept or Reject

Log into the BigWave Systems App or desktop site to accept or reject the referral.

Accept the referral in order to help enroll the consumer in coverage.

Reject the referral if you are unavailable to help. This allows the consumer to be matched with another available agent or broker.

You will not be penalized for rejecting a referral.

Connect with Consumer

Reach out to the consumer within 30 minutes to offer help with the eligibility and enrollment process.

Update the referral's status in Help On Demand:

Delayed: If you left a message and are waiting to connect

Referral Completed: Eligibility and enrollment in Marketplace Qualified Health Plan (QHP) or referred to a state Medicaid agency where applicable

Not a Good Referral: Wrong phone number or not interested

Receive Help On Demand Referrals

After the consumer enters his or her contact information, Help On Demand matches the consumer with an agent or broker who is available, speaks the consumer's language, and is licensed in the consumer's state.

If more than one agent or broker meets this criteria, Help On Demand directs the referral to the agent or broker who is geographically closest to the consumer.

That agent or broker receives a notification from Help On Demand via email, text, and/or app notification, and has 15 minutes to accept or reject the referral before it moves to the next available agent or broker in the queue.

Receive Help On Demand Referrals

In addition, Help On Demand also employs a "**Consumer Safety Net**" – a blast email feature that is triggered when there are no "available" agents and brokers in the area to accept a referral.

Help On Demand sends an email to all Marketplace-registered agents and brokers licensed in the consumer's state who have registered to participate in Help On Demand, regardless of their current availability, notifying them that a consumer is in need of assistance.

The first agent or broker to accept will receive the referral, and the referral will no longer be available to other agents and brokers in the state. It is available on a first-come, first-served basis.

Accept or Reject Help On Demand Referrals

To accept or reject Help On Demand referrals, log into Help On Demand with your username and password. Once you log in, the **Manage Leads** page will be displayed.

- You can view the consumer's name and location before accepting or rejecting the referral.
- To accept the referral, select **Accept** in the status column.
- Once you accept the referral, you will receive the consumer's name and contact information.

The screenshot displays the 'Leads' management page. On the left is a sidebar with navigation links: 'Manage Leads' (highlighted in blue), 'View Metrics', 'Export Metrics', 'Profile', and 'Availability Settings'. The main content area has a header 'Leads' and a 'My Availability' toggle set to 'On'. Below the header is a search section with the text 'Search for Leads by Status, Date-range or Name.' and fields for 'Status' (set to 'all'), 'From' (with a calendar icon), and 'To' (with a calendar icon). There are also input fields for 'First Name' and 'Last Name', and a green 'Search' button. A support message states: 'If you are experiencing issues, please contact Healthcare.gov support at FFMPProducer-AssisterHelpDesk@cms.hhs.gov'. At the bottom is a table with the following data:

Name	Location / Contact	Time to Accept / Time since last update	Status
2 2	73301	23 mins	Accept Reject

Accept or Reject Help On Demand Referrals

When you receive a referral notification, you must accept or reject it within 15 minutes.

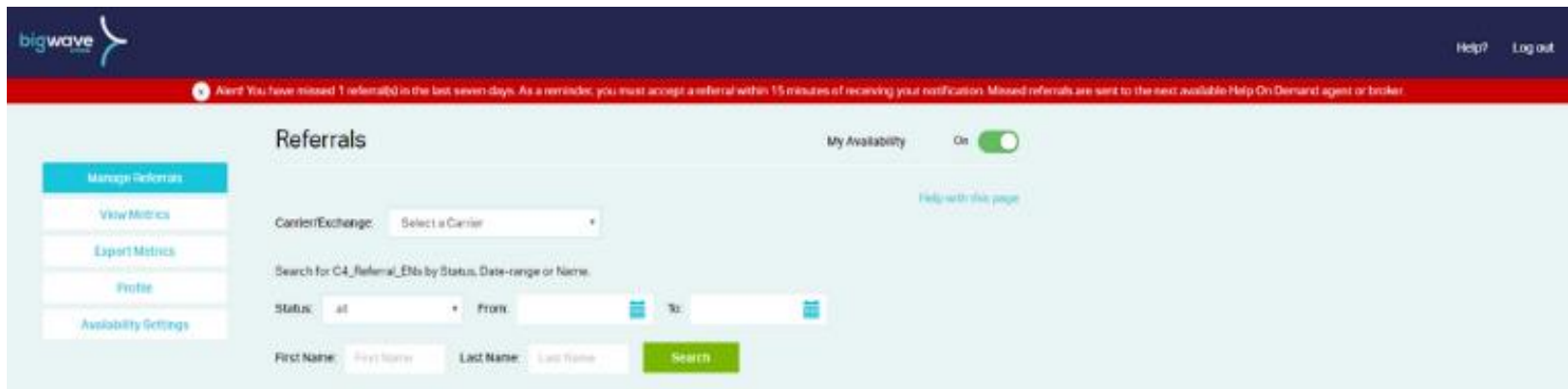
You will not be penalized for rejecting a referral.

- Rejecting referrals when you are not able to assist ensures that consumers can quickly get the help they need.
- By selecting “Reject,” you are immediately sending the referral to the next available agent or broker in the queue.
- This allows another available agent or broker in the area to accept and quickly connect with the referral.

*It is important that you respond to notifications as quickly as possible, so we recommend that you select **Email and Text** or **Email and App Notification** as your preferred contact method on your Help On Demand profile. Receiving notifications via **Email Only** can cause delays and lost referrals.*

Accept or Reject Help On Demand Referrals

If you miss the **15-minute** window to accept or reject a referral, the following message will appear on your Help On Demand profile when you log in:



This banner displays the number of referrals you have missed in the past 7 days at the top of your screen.

Accept or Reject Help On Demand Referrals

You will also be able to see your missed referrals in the Manage Leads section of your account.

Name	Location / Contact	Time to Accept / Time since last update	Status
Missed Referral		17 minutes	Not Picked Up
Missed Referral		22 days	Not Picked Up
Missed Referral		22 days	Not Picked Up
Missed Referral		22 days	Not Picked Up

When you log into Help On Demand you will be able to see how many referrals you have missed and when they were originally received.

Each of your missed referrals will appear within your referral list. Under **Name** you will see the title **Missed Referral** and under **Status**, you will see **Not Picked Up**.

You will not be able to see the missed referrals' consumer information.

Manage Help On Demand Referrals

Contact the consumer as soon as possible after accepting a referral, preferably within 15 minutes of accepting his or her request. If you know that you are unable to promptly connect with a consumer, you should reject the referral so it can be reassigned to the next available agent or broker in the queue.

If a consumer does not respond to your initial phone call or email, you are encouraged to make three attempts to connect with that consumer. However, we understand that sometimes the consumer cannot be reached or provided incorrect contact information. In that instance, you should select the **“Not a Good Referral”** status in Help On Demand.

Please note that your Help On Demand account may be deactivated if you consistently fail to respond to consumer referrals in a timely manner.

Update Referral Status in Help On Demand

As you assist the consumer, be sure to update the status on the Manage Leads page. Help On Demand has the following, simplified referral statuses for reporting and tracking:

- **Accepted:** You have accepted the referral in Help On Demand.
- **Rejected:** You have rejected the referral because you were not available to assist.
- **Delayed:** You are experiencing delays helping the consumer (e.g., left a message, waiting on eligibility determination).
- **Not a Good Referral:** You are unable to assist the consumer (e.g., they are Medicaid eligible, provided incorrect contact information, or are working with another broker).
- **Referral Completed:** You have successfully completed your interaction with the consumer, who has selected a QHP or other non-marketplace coverage, or has been referred to another entity for assistance.

Referral Detail

Status: ▼

First Name:

Last Name:

Preferred Contact Method: ▼

Phone:

Cellphone:

Email:

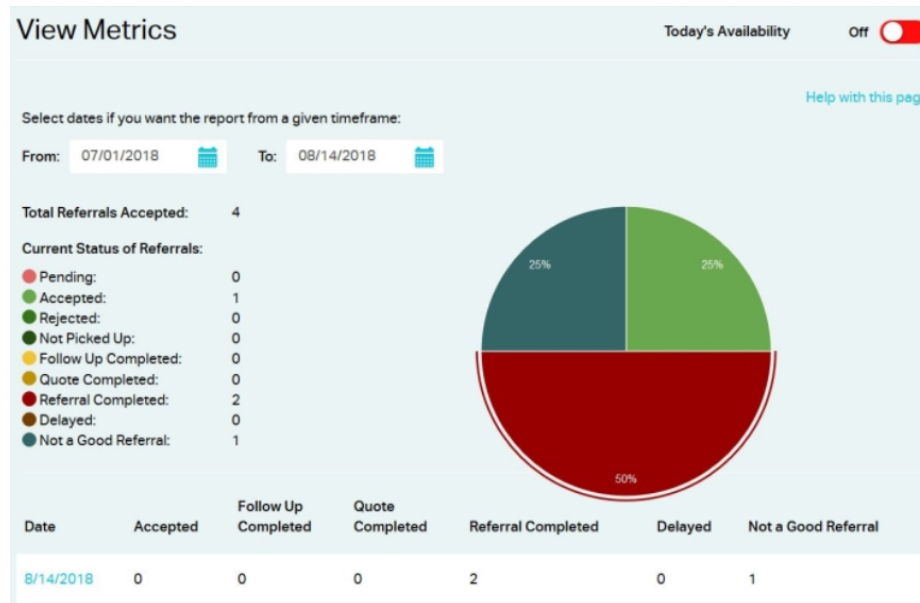
ZIP Code:

Preferred Language:

View Metrics

Updating your referral status also allows Help On Demand to accurately track metrics for your referrals.

By selecting View Metrics on the left-hand navigation bar, you can view daily and total counts for your business.



View Metrics

- Track your overall performance on the View Metrics page.
- Through the View Metrics page, you can see:
 - Maximum acceptance period
 - Average response time to accept referrals
 - Number of missed referrals
 - Percent of referrals accepted
- Use these metrics to gain insight on your book of business and improve your overall assistance performance.

Your Performance Summary	
Maximum Acceptance Period	15 minutes
Average Response Time	2 minutes
Number of Missed Referrals	22
Average Acceptance Percentage	7.7%

Export Metrics

You can also Export Metrics to a .csv format to perform additional analytics.

Please note, consumers' contact information cannot be exported from the tool due to restrictions and other protections of consumer personally identifiable information (PII).

Manage Referrals

View Metrics

Export Metrics

Profile

Availability Settings

Export Metrics

Please export Referrals metrics using the selection criteria below.


Carrier/Exchange:

Help On Demand


▼

Dates (from-to):

1/01/2018



5/25/2018



Export Data Set:

Latest Status

▼

Timezone:

Mountain Standard Time

▼

Export

Cancel

Help On Demand for Agents and Brokers



Best Practices

Best Practices for Interacting with Consumers through Help On Demand

- When you receive a referral notification, you must accept or reject it within 15 minutes.
- You will not be penalized for rejecting a referral. Rejecting the referral immediately sends the consumer to the next available agent or broker in the queue. This allows another available agent or broker in the area to ensure that consumers can quickly get the help they need.
- It is important that you respond to notifications as quickly as possible, so we recommend that you select **Email and Text** or **Email and App Notification** as your preferred contact method on your Help On Demand profile. Receiving notifications via **Email Only** can cause delays and lost referrals.

Best Practices for Interacting with Consumers through Help On Demand

- Maintain your Availability Settings in your Help On Demand profile so that you only receive referrals when you are ready to connect with consumers.
- Contact the consumer as soon as possible after accepting a referral, preferably within 15 minutes of accepting his or her request. If you know that you are unable to promptly connect with a consumer, you should reject the referral so it can be reassigned to the next available agent or broker in the queue.

Best Practices for Interacting with Consumers through Help On Demand

- If a consumer does not respond to your initial phone call or email, you are encouraged to make three attempts to connect with that consumer. However, we understand that sometimes the consumer cannot be reached or may have provided incorrect contact information. In that instance, you should update the referral status in Help On Demand to “Not a Good Referral.”
- Following these best practices will not only help you make the most of your participation in Help On Demand but will ensure that consumers are quickly matched with an agent or broker who can help them enroll in coverage.

Help On Demand for Agents and Brokers



*Help On
Demand
Resources*

Additional Resources

For further resources Visit the Help On Demand Overview located here:

[Help On Demand Overview](#)

You may also view Tips for Maximizing Your Participation in Help On Demand here:

[Tips for Maximizing Your Participation](#)

For Questions about Help On Demand, email FFM Producer-Assister Help Desk here:

[Questions about Help On Demand](#)

Agent and Broker Resources:

Definition of Acronyms

Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CEU	Continuing Education Unit
CMS	Centers for Medicare & Medicaid Services
EIDM	Enterprise Identity Management
FFM	Federally-facilitated Marketplace
FF-SHOP	Federally-facilitated Small Business Health Options Program
FTE	Full-time Equivalent
MLMS	Marketplace Learning Management System
NPN	National Producer Number
PII	Personally Identifiable Information
PY	Plan Year
SBM	State-based Marketplace
SBM-FP	State-based Marketplace on the Federal Platform