

Tips for Maximizing Your Participation in Help On Demand

What is the best method to receive referrals?

There are several options to receive new leads or referrals. Within the Profile tab, you will see the Preferred Contact Method field, which is where you can select notification preferences.

Options include:

- **Email and Text**
- **Email and App Notification** (Download BigWave Systems App for iPhone or Android)
- **Email Only**



Note: CMS suggests that you select **Email and Text** or **Email and App Notification** as your preferred contact method due to the fast-paced nature of Help On Demand. If you choose the **Email and Text** preferred contact method, you will be able to respond more quickly to referrals that are sent to you.

How can I change my availability status?

To change your availability settings, log in to Help On Demand through BigWave Systems and select the “Availability Settings” tab. There are three ways that you can specify your availability:

1. **Specify standard Hours of Availability** for each day 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. If you wish to increase referrals, try adding weekends or longer hours.
 - **Closed** indicates days of the week you do not want to receive referrals (e.g., Saturday and Sunday).
 - **Add More Hours** allows you to choose more time periods to set, for example, if you take a lunch break every day at noon.
2. **Manually override your schedule** using the **Today’s Availability** button in the top right corner of the screen.
 - This button can override your set 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 are ready to stop taking referrals.
3. **Mark your calendar as unavailable** for an extended absence, such as vacation or family leave.
 - Use the **My Vacation Button** to set your absence from a specified date through another date.
 - Use the **Set Me Unavailable Indefinitely** button to set yourself as indefinitely unavailable.

It is imperative that you correctly indicate your availability. If you are not available, but the system thinks you are, a consumer’s request will be sent to you and it will sit in your queue for 15 minutes before moving on to the next agent or broker. Keeping your availability updated will improve consumers’ experience and ensure they are getting the help they need.

How does Help On Demand determine the states where I receive referrals?

You are only eligible to receive referrals in states that participate in the Federally-facilitated Marketplace and State-based Marketplaces on the Federal Platform where you have an active state license with an approved health-related line of authority. For those HealthCare.gov states in which your license has an approved health-related line of authority, you can customize your preferences to select only the HealthCare.gov states in which you would like to receive referrals.

To customize your preferences, follow these steps:

1. [Log in to Help On Demand](#).
2. Navigate to your profile using the left-hand navigation toolbar.
3. Towards the bottom of your profile, you will see a **State Preferences** field. This field auto-populates to include all HealthCare.gov states where you have an active state license with an approved health-related line of authority.
4. Use the dropdown menu to select and/or deselect states using the bubble indicator for each state.
 - a. *A blue bubble indicates that the state is selected and you will receive referrals from that state.*
 - b. *A white bubble indicates that the state is deselected and you will not receive referrals from that state.*
5. **Save** your changes.

Once you have updated your State Preferences, **you will only receive referrals from the HealthCare.gov states you selected**. For example, an agent or broker may be licensed in seven states, but only wants to receive referrals from four states. That agent or broker would select those four states for referrals.

Why can't I see my referrals when I log into Help On Demand?

To retain a referral, you must accept it within **15 minutes** before it is reassigned to another agent or broker. *You will not be penalized for rejecting a referral.*

If you **do not** accept the referral within 15 minutes, a red alert banner will appear on the top of your Help On Demand profile page to notify you of the missed referral. This alert **will only display if you have missed referrals** and will include the total number of missed referrals from the **past 7 days**.



Note: Based on your cellular carrier and physical location, delayed delivery of an email or text message may impact your ability to accept referrals on a mobile phone.

What are CMS' expectations for contacting the consumer?

After you accept the referral, CMS expects that you will contact the consumer as soon as possible, preferably **within 15 minutes of accepting the consumer's request**. You should not wait longer than 30 minutes to contact the consumer. 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.

When you receive a referral notification, it is important that you respond as quickly as possible. You will not be penalized for rejecting a referral if you are unavailable. Rejecting the referral causes the consumer to be immediately routed to the next available agent or broker in the queue. This allows another available agent or broker in the area to accept the referral and connect with the consumer. Doing so ensures that consumers can quickly get the help they need.

If you accept a referral and the consumer does not respond to your initial phone call or text message, CMS encourages you to make three attempts to connect with that consumer. However, we understand that sometimes the consumer cannot be reached, for example if the consumer provides an incorrect phone number or email address. In that instance, you should select the "Not a Good Referral" status in Help On Demand.

How do I change a consumer's status in Help On Demand?

It is extremely important to remember to update your consumer's status in Help On Demand so that CMS can provide him or her the highest quality of service. To do this, you must first log in to your Help On Demand profile with your username and password. Once you log in to Help On Demand, the Manage Referrals page will be displayed.

Be sure to update your referral in Help On Demand by assigning one of the following referral statuses for reporting and tracking:

- **Accepted**
- **Delayed**
- **Referral Completed**
- **Not a Good Referral**