

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 your Help On Demand agent or broker **Preferred Contact Method** Profile, you must select a preferred method of notice from the three drop-down options:

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



Note: Because speed is critical and you only have 15 minutes to accept a referral, the Centers for Medicare & Medicaid Services (CMS) recommends that you select “Email and Text” or “Email and App Notification.”

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

You have exactly **15 minutes** to accept referrals from Help On Demand. This technology is automated, so there is no grace period. If you do not log into the BigWave Systems app on your computer or mobile phone and click “Accept” within 15 minutes, the referral will be automatically reassigned to the next available agent or broker in the queue. **If you log into the app after the 15 minutes has passed, you will not be able to see the referral.** Missed referrals are not visible to you to protect the consumer’s information.



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.

How can I change my availability status?

To change your availability settings on Help On Demand, complete the following:

1. Log in to Help On Demand through BigWave Systems where five tabs will be available.
2. Select the “Profile” tab.
3. Select the “Availability Settings” tab and set availability.



Note: There are three ways that you can specify your availability:

- **Specify standard Hours of Availability** for each day you are available for Marketplace 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).
 - If you wish to increase referrals, try adding weekends or longer hours.
 - **Add More Hours** allows you to choose more time periods to set, for example if you take a lunch break every day at noon.
- **Manually override your schedule** using the button in the top right corner of the screen.
 - This button can override your set schedule on a temporary basis.
 - Simply move the 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.
- **Mark your calendar as unavailable for an extended absence**, such as vacation or family leave.

It is imperative to 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 the consumer’s experience and ensure they are getting the help they need.

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 them the highest quality of service. To do so, log into the BigWave Systems app on your computer or mobile phone and navigate to the **Manage Referrals** tab. There, choose the relevant status for each consumer from a dropdown menu. After you have successfully helped a consumer, you should close out the referral by assigning the **Referral Completed** status. If you are unable to assist the consumer (e.g., they do not speak the same language or their contact information was incorrect), close out the referral by assigning the **Not a Good Referral** status.

How does Help On Demand determine where I can receive referrals?

Help On Demand uses the information provided in your **Find Local Help profile** to determine your eligibility to receive referrals in different states operating a Federally-facilitated Marketplace (FFM) or State-based Marketplace on the Federal Platform (SBM-FP). You are only eligible to receive referrals in FFM and SBM-FP states where you are licensed and hold a valid health line of authority.

Within your CMS Enterprise Portal, you are asked to indicate your Find Local Help preferences. Your selection directly impacts the states where you will receive referrals in Help On Demand. There are four options available:

- **Option 1: I would like all my contact information displayed** - If you choose this option, you will **only** receive Help On Demand referrals in the state listed as your home state in your MLMS profile. You will not receive referrals in other states where you may also hold a valid health license. Only your contact information for your home state (listed in your MLMS profile) will display on Find Local Help.
 - 💡 **Note:** If you choose this option and your home state operates a State-based Marketplace, you will not be eligible to register for Help On Demand. You will not be eligible to participate in Help On Demand until you update your Find Local Help preferences to option 2 or 3 below.
- **Option 2: I would like my profile information displayed, except my street address - Including states where I have a valid health license** - If you choose this option, you will receive Help On Demand referrals in all FFM and SBM-FP states where you hold a valid health license. Your contact information (excluding your street address) will display on Find Local Help.
- **Option 3: I would like all my profile information displayed, including states where I have a valid health license** - If you choose this option, you will receive Help On Demand referrals in all FFM and SBM-FP states where you hold a valid health license. Your contact information will display on Find Local Help.
- **Option 4: I don't want my contact information displayed** - If you choose this option, you will not be eligible to participate in Help On Demand because you requested no sharing of your contact information. Your contact information will not display on Find Local Help.

To maximize the number of referrals you receive from Help On Demand, select Option 2 or Option 3.

If you would prefer to only receive referrals in your home state, as listed in your MLMS profile, select Option 1.

Follow the steps below to update your Find Local Help settings in your MLMS profile:

1. Log in to the CMS Enterprise Portal at <https://portal.cms.gov> using your FFM User ID.
2. Navigate to the "Agent Broker Registration Status" webpage, and select the "Complete Agent Broker Training" to be directed to the "Training Options" webpage.
3. At the top of the MLMS profile webpage, you must identify yourself as one of the three agent or broker options.
4. In the "Find Local Help" section, select the option that best meets your needs for Help On Demand referrals.
5. Update the contact information that you wish to change. Click "Save/Update" at the bottom of the webpage.

Please be advised it can take up to two business days for the "Find Local Help" feature to reflect your updated display status.

What are CMS' expectations for contacting the consumer?

To retain a referral, you must accept it within 15 minutes. After you accept the referral, CMS expects that you will contact the consumer as soon as possible, preferably within 15 minutes of accepting their 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 decline the referral so it can be reassigned to the next agent or broker in the queue. You will not be penalized for rejecting a referral; doing so ensures that the consumer can quickly get the enrollment assistance they need and requested.

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 they provide an incorrect phone number or email address. In that instance, you should select the "Not a Good Referral" status in Help On Demand.