



Help On Demand: Tips for Maximizing Your Participation

What is the Best Method to Receive Help On Demand Referrals?

There are several options to receive Help On Demand consumer referrals. Within the **Profile** tab in your Help On Demand account, you will see the **Preferred Contact Method** field, which is the method Help On Demand will use to notify you when you receive a new referral.

There are four (4) options within the drop-down box:

- **Email, Text & App Notification** (Download the Help On Demand App for [iPhone](#) or [Android](#))
- **Email & Text**
- **Email & App Notification** (Download the Help On Demand App for [iPhone](#) or [Android](#))
- **Email Only**



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

If you are using the Help On Demand app on your mobile phone, you may enable fingerprint scan or face recognition for fastest log in access to accept referrals.

The email address in your Help On Demand profile is driven by your MLMS profile. Email notifications will only be sent to this email address. If you wish to update this email address, please log into your account on the CMS Enterprise Portal at <https://portal.cms.gov>.

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 the consumer, you should reject 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.

If you accept a referral and the consumer does not respond to your initial phone call or message, CMS encourages you to make three (3) attempts to connect with the consumer. If you are still unable to connect with the consumer after three (3) attempts, make sure to update their referral status to **Not a Good Referral**.



How Can I Change my Availability Status?

To change your **Availability Settings**, log in to Help On Demand and select the **Availability Settings** tab. There are three (3) 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.
- You can use the toggle feature next to each day of the week to indicate the days of the week you are closed and do not want to receive referrals (e.g., Saturday and Sunday).
- **Add a Break** feature allows you to set more time periods during which you are unavailable for referrals, for example, if you take a lunch break every day at noon.
- Be sure to **Save** your changes.



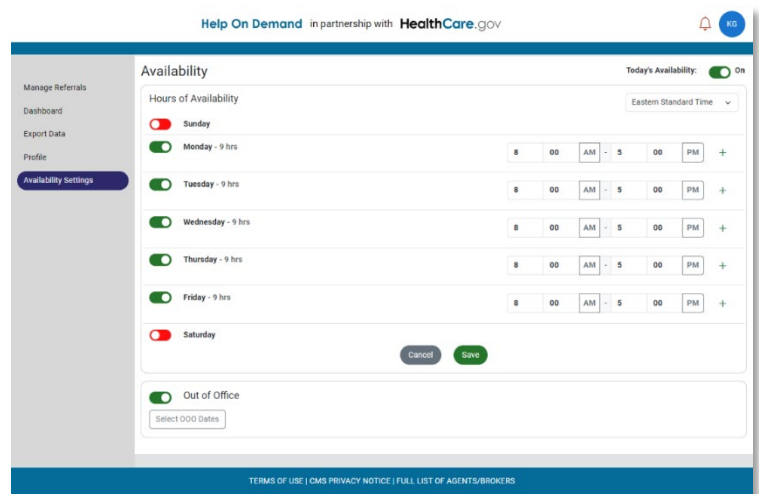
Note: Want more referrals? Try adding weekends or longer hours.



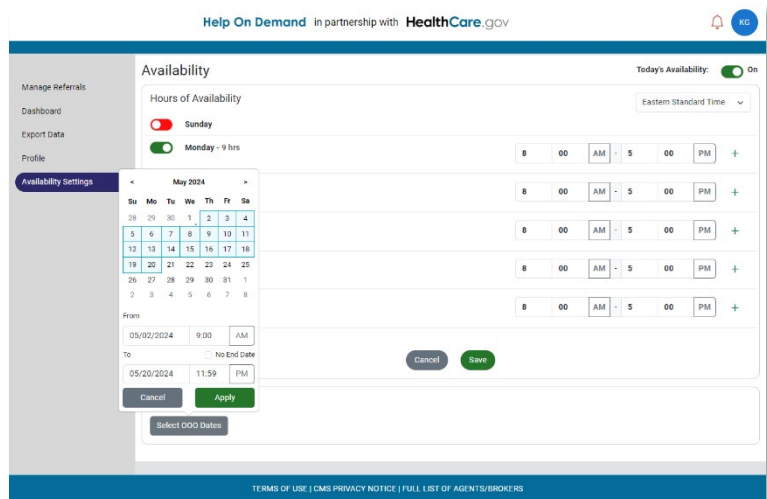
2. **Manually override your schedule** using the **Today's Availability** button in the top right corner of the screen.
 - The **Today's Availability** toggle switch overrides your regular scheduled hours of availability only on a temporary basis. To properly use the Today's Availability toggle switch, you will simply move the toggle switch to Green or 'On' when you want to start receiving referrals before or after your set standard hours of availability within that day. Please note, you will stop receiving referrals based on the "Stop Referrals" timestamp indicated in red within the Today's Availability pop-up message.

3. **Mark your calendar as unavailable** if you will be away for a set period of time, such as family leave or a vacation. You can mark your calendar as unavailable by using the **Out of Office** feature.
 - You can set your **Out of Office** for specified days and times, or you can set it indefinitely.
 - To stop receiving referrals for a specific date range, you will toggle on the Out of Office feature.

1. Click on the **Select OOO Dates**



2. Enter a From Date/Time, enter a To Date/Time
3. Click on Apply to save changes.





- To stop receiving referrals indefinitely, you will toggle on the Out of Office feature.
 1. Click on the **Select OOO Dates**
 2. Enter a From Date/Time
 3. Check the **No End Date** check box and click **Apply**.

Help On Demand in partnership with HealthCare.gov

Today's Availability: Off

Manage Referrals

Dashboard

Export Data

Profile

Availability Settings

Availability

Hours of Availability

Eastern Standard Time

Sunday

Monday - 9 hrs

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

From: 05/02/2024 9:00 AM

To: No End Date

Cancel Apply

Select OOO Dates

Cancel Save

TERMS OF USE | CMS PRIVACY NOTICE | FULL LIST OF AGENTS/BROKERS

4. Be sure to click Yes to save changes.

Today's Availability: Off

Eastern Standard Time

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

8 00 AM - 5 00 PM +

From: 05/02/2024 9:00 AM

To: No End Date

Cancel Apply

Select OOO Dates

Cancel Save

TERMS OF USE | CMS PRIVACY NOTICE | FULL LIST OF AGENTS/BROKERS

This action will mark you as unavailable to receive Referrals. To begin receiving Referrals again, you must turn your Out of Office indication off. Are you sure you want to continue?

No Yes



Note: If you select the **No End Date** box, you will not receive referrals until you toggle **OFF** the Out of Office feature.

You must correctly indicate your availability. If you are not available, but the system thinks you are, a consumer's request will be sent and sit in your queue for 15 minutes before moving to the next agent or broker. Keeping your availability updated improves consumers' experiences and ensures they get the help they need. Failure to consistently respond to referrals, by either accepting or rejecting them, may result in your Help On Demand account being suspended.



How Do I Change a Consumer's Status in Help On Demand?

It is extremely important to remember to update your consumer's referral status. To do this, you must first log in to your [Help On Demand](#) profile with your username and password. Once you log into Help On Demand, the **Manage Referrals** page will be displayed.

After accepting a referral, be sure to continue to update the status of your referral in Help On Demand by assigning one of the following referral statuses for reporting and tracking:

- **Pending:** You have a referral that is ready to be accepted or rejected in Help OnDemand.
- **Accepted:** You have accepted the referral in Help On Demand.
- **Rejected:** You have rejected the referral because you were not available to assist.
- **In Progress:** You reached out and left a message but are waiting to connect with the consumer.
- **Not a Good Referral:** You are unable to assist the consumer (e.g., the consumer provided incorrect contact information or is working with another broker).
- **Referral Completed:** You enrolled the consumer in a qualified health plan (QHP) or referred them to a state Medicaid agency.



Note: You are required to assist consumers with Marketplace eligibility determinations and enrollments as a participating Help On Demand agent or broker. Consumers who are referred from HealthCare.gov or who are coming to you for Marketplace enrollment assistance are looking for Marketplace QHPs and/or other insurance affordability coverage, including Medicaid and Children's Health Insurance Program (CHIP). As a condition of your participation in Help On Demand, you must help enroll consumers or direct them to these coverage options whenever possible.

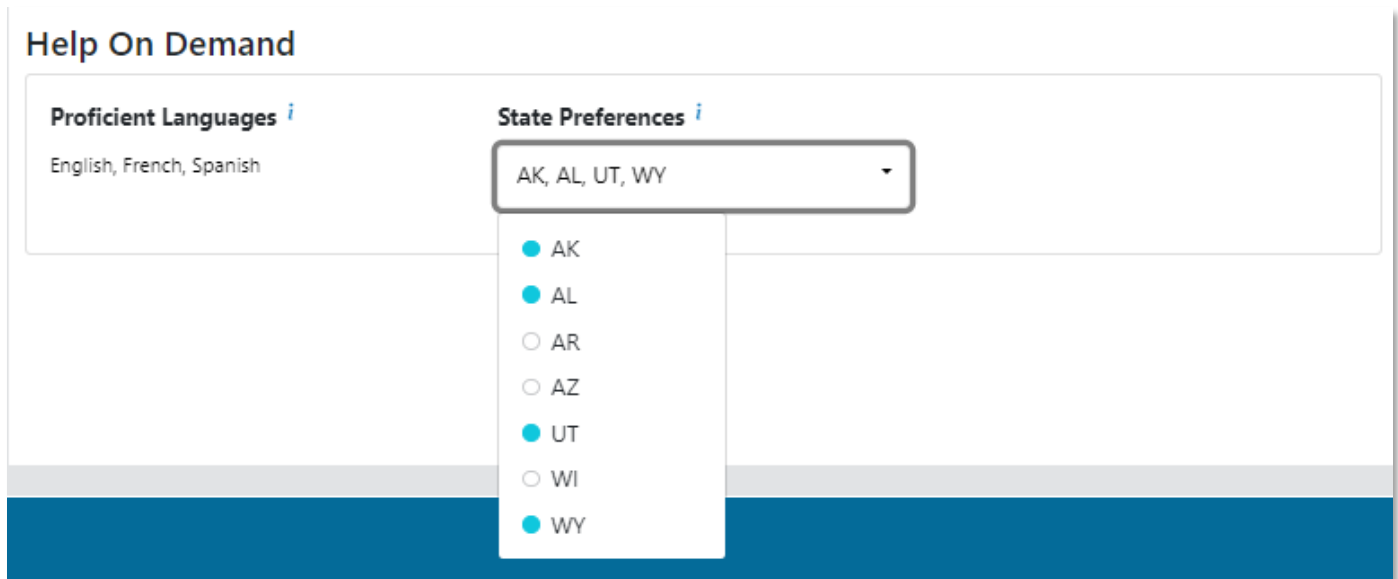


How Does Help On Demand Determine the States Where I Receive Referrals?

You are only eligible to receive referrals in states that participate in the Federally-facilitated Marketplace (FFM) and Marketplaces on the Federal Platform (i.e., states that use HealthCare.gov for enrollments) where you have an active state license with an approved health-related line of authority, as provided by the National Insurance Producer Registry (NIPR). 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** tab using the left-hand navigation toolbar.
3. Toward 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 blue bubble indicates that the state is selected; you will receive referrals from that state.
 - A white bubble indicates that the state is deselected; 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.* Be sure to update your availability regularly on your Help On Demand profile to ensure that you receive referrals when you're ready to help consumers.

If you miss the **15-minute window to accept or reject a referral**, the following notification will appear on your Help On Demand account when you log in to inform you of this missed referral(s):

- Alert! You have missed 1 referral in the last 7 days. As a reminder, you must accept a referral within 15 minutes of receiving your notification. Missed referrals are sent to the next available Help On Demand agent or broker.

This alert **will only display if you have missed referrals.**

Name	Contact Information	Referral Assigned	Referral Expires	Referral Status
Missed Referral		05/01/2024 01:50 PM	Expired	

When you log into Help On Demand, you will see any missed referrals in the **Manage Referrals** section of your account. Within the **Referral Assigned** column, you will see the assigned date and time the referral was sent to you. Please note, you won't be able to see the consumers' contact information, and instead under **Name**, you will see the title of **Missed Referral**.

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.

To learn more about [Help On Demand](#), how to register, and what you need to know to receive consumer referrals, visit the [Help On Demand section](#) of the [Agents and Brokers Resources webpage](#).

Note: This is a Centers for Medicare & Medicaid Services (CMS)-contracted service developed and hosted by Help On Demand. Help On Demand referrals are not provided by CMS or the Marketplace and they do not constitute an endorsement by the Department of Health & Human Services or the U.S. Government of the individual agents or brokers.