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 assistance referrals. Within the **Profile** tab, 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 three options within the drop-down box:

- **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** or **Email & App Notification** as your preferred contact method on your Help On Demand profile. Notifications via **Email Only** can cause delays and lost referrals.
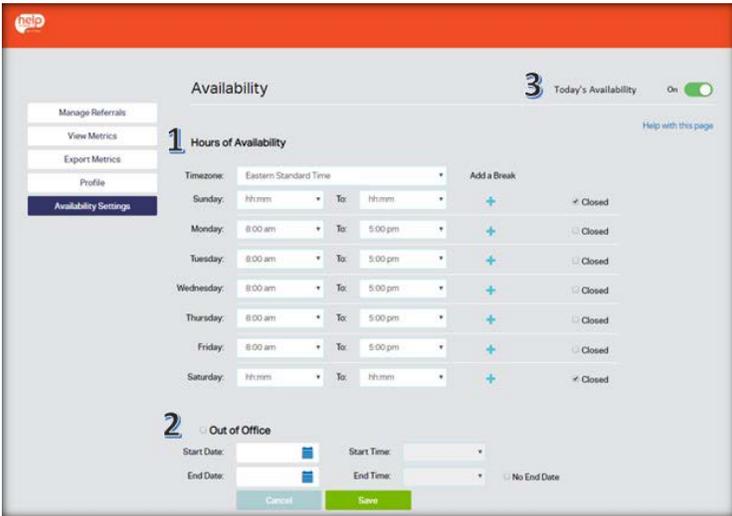
Note: You will only receive email notification to your Marketplace Learning Management System (MLMS) email address listed in the 'Referral/MLMS Email' field within your Help On Demand profile.

Note: This is a Centers for Medicare & Medicaid Services (CMS)-contracted service developed and hosted by Help On Demand (formerly known as BigWave Systems). 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.

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 ways that you can specify your availability:

If you have any questions or concerns, please contact the Agent/Broker Email Help Desk at: FFMProducer-AssisterHelpDesk@cms.hhs.gov

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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.
   - **Closed** indicates days of the week you 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** button overrides your regular schedule on a temporary basis only – it resets the following day to match your standard hours of availability. 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 for the day.

3. **Mark your calendar as unavailable** if you will be away for a set period of time, such as family leave or 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, enter a **Start Date/Time**, an **End Date/Time**, and **Save**.
     - ○ To stop receiving referrals indefinitely, enter a **Start Date/Time**, check the **No End Date** box, and **Save**.
   - Be sure to **Save** your changes.

   Note: If you select the **No End Date** box, you will not receive referrals until you manually uncheck the **No End Date** box.

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.

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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. 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.*
   - *An empty white bubble indicates that the state is deselected; you will not receive referrals from that state.*
4. **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 message will appear on your Help On Demand account when you log-in to inform you of this missed referral(s):

- Alert! You have missed one referral in the last seven 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.** It includes the total number of missed referrals from the **past seven (7) days**.

You will also be able to see your missed referrals in the **Manage Referrals** section of your account. While you won't be able to see the consumers' contact information, you will be able to see how many referrals you missed, and when they were originally received. Under **Name**, you will see the title of **Missed Referral**.

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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 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 update their referral status to **Not a Good Referral**.

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. Your Help On Demand account may be deactivated if you do not consistently update your consumers' referral status.

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.

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 On Demand.
- **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 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., 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.

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.

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