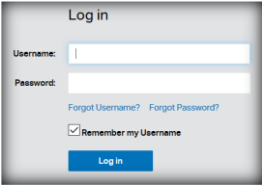
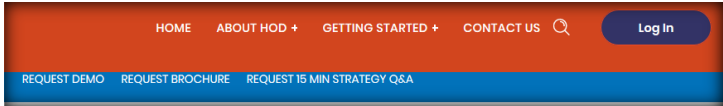

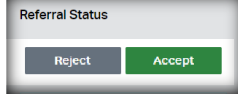
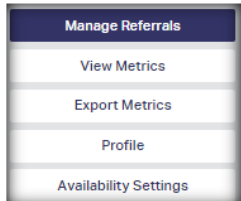
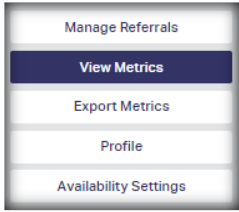


# HELP ON DEMAND TIP SHEET: MANAGING REFERRALS

Welcome to Help On Demand! It's time to start receiving and managing customer referrals.

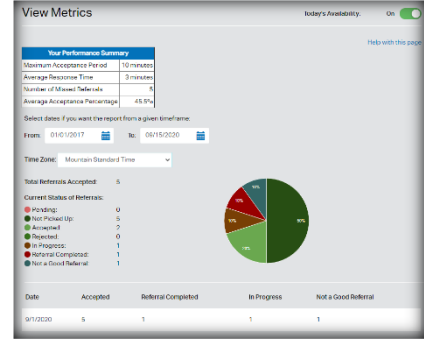
<p><b>1. Logging Into Help On Demand</b></p> 	<p><a href="http://www.HelpOnDemand.com">www.HelpOnDemand.com</a></p>  <ul style="list-style-type: none"> <li>• Click on “Log In” button on the top right corner of the Help On Demand website.</li> <li>• You can also access HOD directly using this link. <a href="https://app.bigwavesystems.com/login">https://app.bigwavesystems.com/login</a></li> <li>• Log in using your username (email address) and password. <i>(If you have forgotten your Username or Password, click on the blue link.)</i></li> </ul> <p>Once you log into Help On Demand, the Manage Referrals page will be displayed.</p>
<p><b>2. Accepting A Referral</b></p> 	<p>Accept a referral from your “Manage Referrals” tab.</p>  <ul style="list-style-type: none"> <li>• You have <b>15 minutes</b> to either Accept or Reject a referral. Except during the last two weeks of Open Enrollment it will be 10 minutes.</li> <li>• To accept the referral, simply select the “Accept” button under the Referral Status column.</li> <li>• <b>Accepted</b> = Broker/Enrollment Counselor has accepted the referral and will gain access to all referral detailed information.</li> <li>• <b>Missed Referral</b> = Broker/Enrollment Counselor has not accepted the referral within <b>15 minutes</b> and it is sent back to the queue as an opportunity for another Broker/Enrollment Counselor. The missed referral will be indicated as “Expired” under the Referral Status column on the Manage Referrals page.</li> </ul>
<p><b>3. Managing A Referral</b></p> 	<p>You can manage referrals by moving the status as follows:</p> <p><b>Accepted</b> = Broker/Enrollment Counselor has accepted the referral in Help On Demand using the Help On Demand desktop site or mobile app.</p> <ul style="list-style-type: none"> <li>• Accepted referrals need to be contacted with in <b>15 minutes as per beWellnm’s Terms of Use.</b></li> </ul> <p><b>Rejected</b> = Broker/Enrollment Counselor has rejected the referral in Help On Demand using the Help On Demand desktop site or mobile app and the referral is assigned to another Broker/Enrollment Counselor who is available.</p> <p><b>In Progress</b> = Broker/Enrollment Counselor is in progress of reaching the customer. Usually a short-term delay. Dropdown Options: <i>Left a message, Asked me to call back, Will call me back, Needs help in person, No income, Currently moving to state, Waiting for financial information, Medicaid challenges, Referral had technical issues, Waiting on eligibility determination, Other</i></p> <p>Once the Broker/Enrollment Counselor completes work with the customer, close out the referral by assigning it one of the following <b>closeout statuses</b>: <b>(per beWellnm’s Terms of Use, you must take 65% of your accepted referrals to a closeout status).</b></p> <ul style="list-style-type: none"> <li>• <b>Referral Complete</b> once the Broker/Enrollment Counselor has successfully assisted the customer. Dropdown Options: <i>Sold, Referred to Medicaid, Other</i></li> <li>• <b>Not a Good Referral.</b> Broker/Enrollment Counselor was unable to assist the customer. Dropdown Options: <i>Does not speak my language, Changed mind, Incorrect contact information, Duplicate lead, Medicaid, Working with another broker, Other.</i></li> </ul>

#### 4. View Metrics

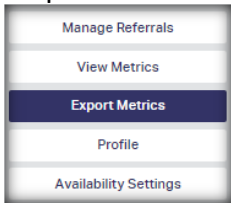


Select **View Metrics** to view daily and total referrals. There is search functionality to view referral status quantities for any chosen timeframe. You can also view your own performance metrics for any chosen timeframe.

Your Performance Summary	
Maximum Acceptance Period	15 minutes
Average Response Time	3 minutes
Total Number of Referrals Assigned	5
Number of Missed Referrals	0
Average Acceptance Percentage	50.0%

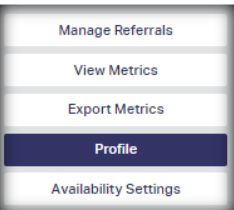


#### 5. Export Metrics



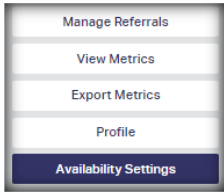
**Export referrals to .csv** and perform your own reporting (counts by status, etc.).  
*(Note: You cannot download referral contact information due to PII requirements.)*

#### 6. Profile

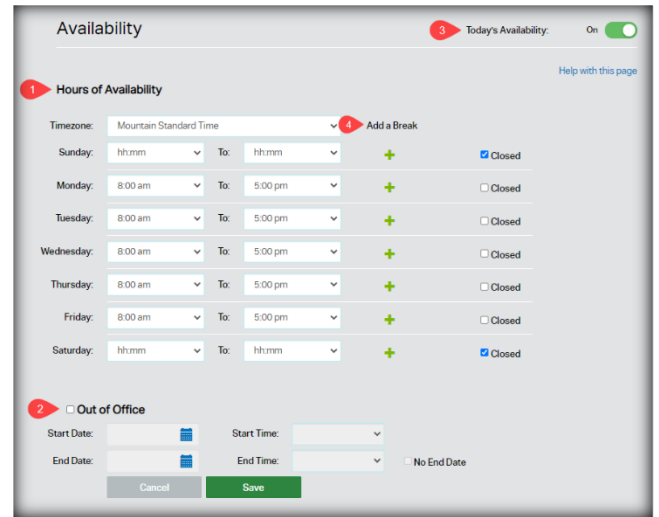


**Preferred Contact Method.** We **highly** recommend “Email, Text, & App Notification” as this helps you be very accessible and timely in responding to customer requests for assistance. You can log into your Profile, view the Preferred Contact Method, and can change this preference at any time. For new users, the default is “Email, Text, & App Notification”.

### 7. Availability Settings



1. **Hours of Availability** defaults to 8:00 a.m. to 5:00 p.m. five days a week (Monday – Friday) and can be customized to schedule.
2. The **Out of Office** feature suspends alerts for a specific period, such as a vacation or family leave – Broker/Enrollment Counselor can also set their Out of Office with **No End Date**.
3. Brokers/Enrollment Counselors can use the **Today's Availability** toggle switch to temporarily override their current hours of availability.
4. **Add a Break** feature allows you to block time within a day to not receive referrals notifications.



### 8. Pending Offline / "Safety Net"

Brokers/Enrollment Counselors MAY receive referral notifications via email outside of their set hours of availability.

If a customer requests assistance, but no Brokers/Enrollment Counselors are available, Help On Demand sends an email to all Broker/Enrollment Counselors who have completed Help On Demand registration and are licensed in that customer's state, notifying them that a customer needs their assistance. The first Broker/Enrollment Counselor to "Accept" the referral receives the referral's contact information and is simultaneously deleted from all other Broker/Enrollment Counselor accounts as a Pending Referral. **Please Note:** Not accepting a referral outside your set hours of availability will not impact your acceptance rate.