

1. Select your **preferred contact method** on the Profile tab.

- Please note that the system defaults your Preferred Contact Method to “[Email, Text & App Notification](#)”.

Preferred Contact Method:

Email, Text & App Notificati
Email, Text & App Notification
Email & Text
Email & App Notification
Email Only

Preferred Contact Method Options

Email, Text & App Notification

**Highly recommended*

The system defaults your Preferred Contact Method to **Email, Text & App Notification**. After registration, look for text message notifications of new referrals in addition to email notifications.

Email & App Notification

If you select **Email & App Notification**, look for the following message on your mobile phone in addition to an email notification.

- If you have not already done so, please download the Help On Demand app on your iPhone or Android device first.

Email Only

If you select **Email Only**, you will receive only email notifications for new referrals. Due to the fast-paced nature of Help On Demand, you are strongly encouraged to receive text messages or app notifications in addition to email notifications. Email-only notifications can cause delays and missed referrals.

2. Log in to Help On Demand using your username and password.



Username
Password
Remember Me
Log In
Forgot Username?
Forgot Password?
Do not use "Remember Me" on public or shared computers.

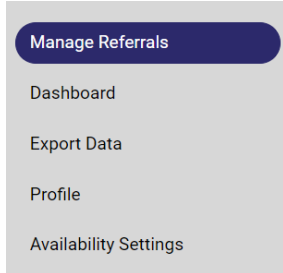
3. Once you log in to Help On Demand, the Manage Referrals page will be displayed.

Help On Demand in partnership with COVERED CALIFORNIA
Today's Availability: On

Manage Referrals
Dashboard
Export Data
Profile
Availability Settings

Referrals
Search for Referrals by Status, Date-range or Name.
Enter Search Criteria
Today 1w 1m 1y 4/25/2026 - 6/24/2026 Pacific Standard Time
Accepted 5 In Progress 0 Referral Completed 0 Not a Good Referral 0 Missed Referral 0
Search

4. Accepting a Referral

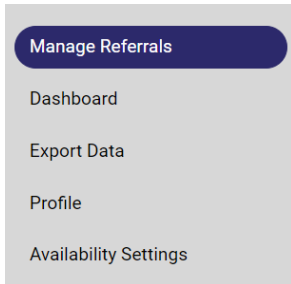


Accept a referral from the Manage Referrals page.

- You have 8 minutes to either accept or reject a referral.
- If the referral is not accepted within 8 minutes, it moves to the next available enroller.
- You can view the referral's ZIP code and city before accepting or rejecting it.
- To accept the referral, click the green "Accept" button. At this point, you are responsible for moving the referral to the appropriate status and status reason.

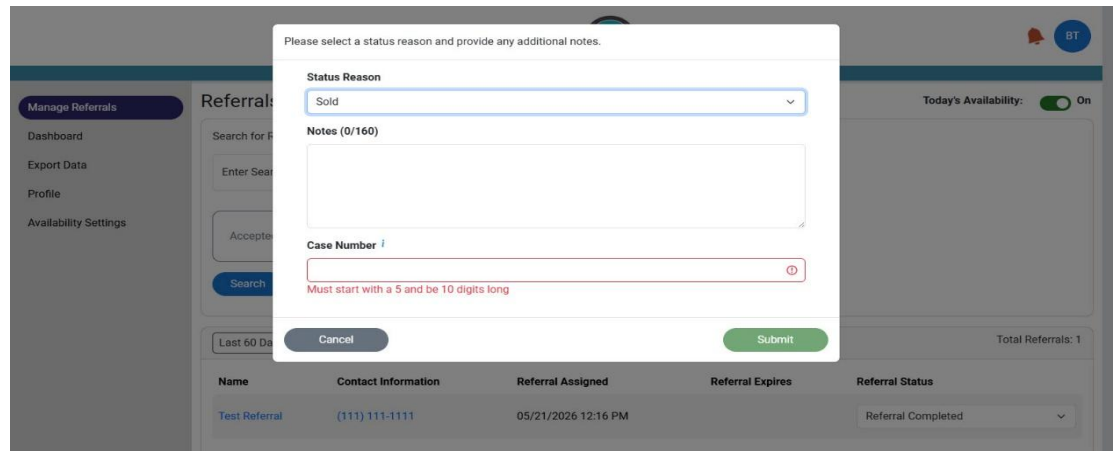
Name	Contact Information	Referral Assigned	Referral Expires	Referral Status	
Pending Referral	Los Angeles, Los Angeles, CA	07/08/2026 01:10 PM	7 minutes	Reject	Accept

5. Manage Referrals



Update referral statuses as follows:

- Please follow up on your referral within 10 minutes.
- After contacting the referral, update the status to one of the following: **In Progress, Not a Good Referral, or Referral Completed.**
- Move the referral status to **In Progress** when action is pending, such as "left a message" or "waiting for financial information."
- Move the referral status to the closeout status **Not a Good Referral** when you are unable to offer a quote for reasons such as "does not speak my language" or "consumer changed mind." (Justification is required.)
- Move the referral status to the closeout status **Referral Completed** when the quote has been completed.
 - If the referral is moved into a 'Sold' status reason, a case number is required.



6. Dashboard

Manage Referrals

Dashboard

Export Data

Profile

Availability Settings

Select **Dashboard** to view status counts for referrals assigned or missed within a specific date range. You will see five performance indicators for review. Search functionality allows you to view referral status counts for any selected timeframe.



7. Export Data

Manage Referrals

Dashboard

Export Data

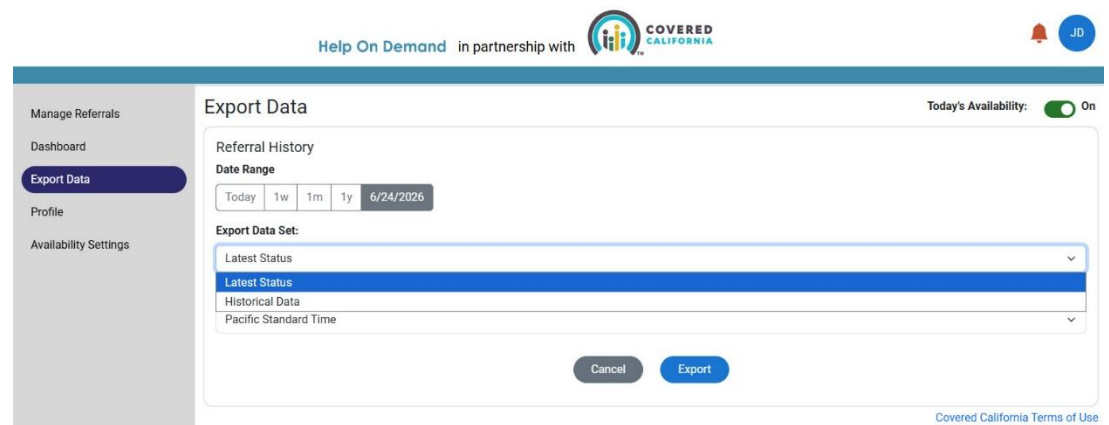
Profile

Availability Settings

Export referrals to a CSV file and perform your own reporting, such as counts by status. As shown in the image below, you can export one of two data sets:

- Latest Status
- Historical Status

(Note: You cannot download referral contact information to comply with PII requirements.)



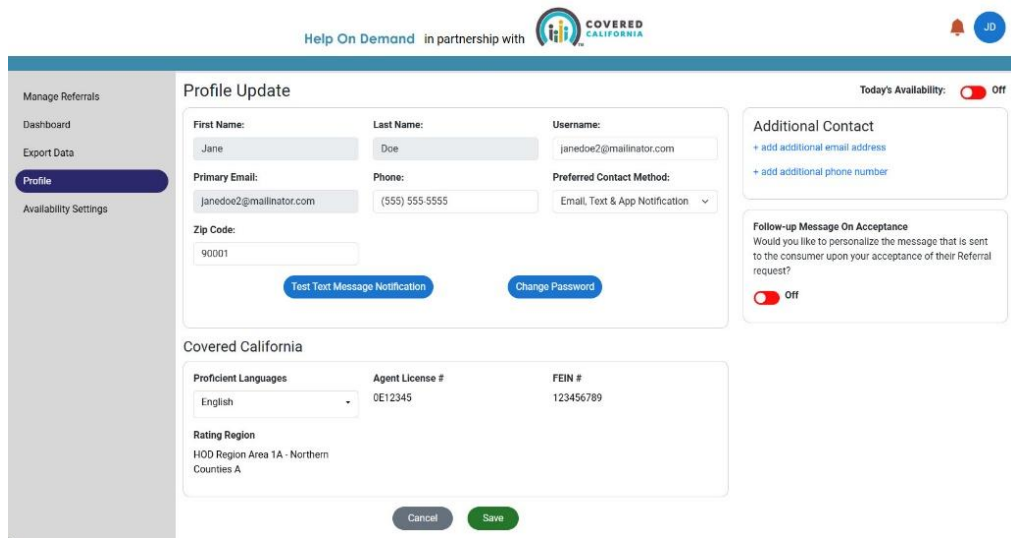
The Export Data form allows users to export referral history. The date range is set to 6/24/2026. The export data set is set to Latest Status. The form includes a sidebar with navigation options: Manage Referrals, Dashboard, Export Data (selected), Profile, and Availability Settings. The main content area displays the Export Data form with a date range selector, an export data set dropdown, and a time zone dropdown. The form includes 'Cancel' and 'Export' buttons. The footer includes the Covered California Terms of Use link.

8. Profile

- Manage Referrals
- Dashboard
- Export Data
- Profile**
- Availability Settings

Use the “Profile” tab to update the following areas:

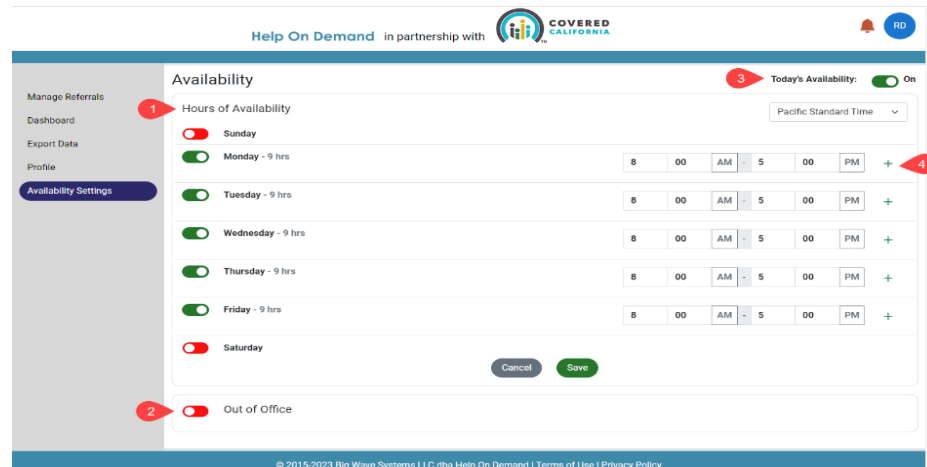
1. Add “Additional Email”
2. Add “Additional Phone”
3. Change your Preferred Contact Method
4. Use the “Test Text Message Notification” button to ensure that you receive text messages for referral notifications.



9. Availability Settings

- Manage Referrals
- Dashboard
- Export Data
- Profile
- Availability Settings**

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



10. Pending Offline / “Safety Net”

[Manage Referrals](#)[Dashboard](#)[Export Data](#)[Profile](#)[Availability Settings](#)

Brokers may receive referral notifications via email outside their stated hours of availability.

If a customer requests assistance but no enrollers are available, Help On Demand sends an email to all enrollers who have completed Help On Demand registration and are licensed in that customer's state. The first enroller to “Accept” the referral receives the referral's contact information, and the referral is simultaneously removed from all other enroller accounts.

Please note that declining a referral received outside your stated hours of availability will not affect your acceptance rate.