

Overview:

The Help On Demand tool contains four status options for managing referrals.

This guide provides definitions and examples for each referral status.

Category	Definition	Closeout Status	Requires Status Reason?	Example ²
Accepted	Status selected when an enroller accepts a pending referral from a consumer and agrees to assist with enrollment	No — Transitional Status ¹	No	An enroller receives a Help On Demand referral notification and accepts the referral through the mobile app
In Progress	Status used to temporarily manage a referral after initial contact has been made, but before it is completed or closed as a “Not a Good Referral.”	No — Transitional Status ¹	Yes — a status reason must be selected	The consumer has been contacted and asks the enroller to call back, needs in-person assistance, is currently moving to the state, or has another temporary circumstance
Not a Good Referral	Status selected after contacting the consumer and determining that they are not eligible for a Covered California plan	Yes	Yes — a status reason must be selected	An enroller contacts the consumer and discovers that the consumer is eligible for Medi-Cal, is already enrolled in a Covered California or off-exchange plan, is not interested, or cannot be reached after three attempts to contact them.
Referral Completed	Status selected after successfully enrolling the consumer in a Covered California plan	Yes	Yes — a status reason must be selected. A “Sold” status reason requires a case number	The consumer has been successfully enrolled in a Covered California plan

¹ Transitional statuses are temporary statuses intended to help the Certified Enroller move the referral through the Help On Demand process until it is closed as either “Referral Completed” or “Not a Good Referral.”

² Examples are not exhaustive.

If there are any questions regarding referral statuses in the Help On Demand system, a Certified Enroller can always contact HelpOnDemand@covered.ca.gov to request assistance.