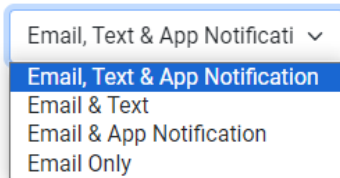


1. Select your **preferred contact method** on the Profile tab.

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

Preferred Contact Method:



The dropdown menu shows the following options: Email, Text & App Notification (selected), Email & Text, Email & App Notification, and 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

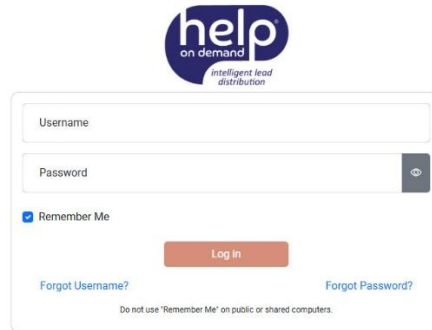
If you select **Email & App Notification**, look for the following message on your mobile phone in addition to an email notification.

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

Email Only

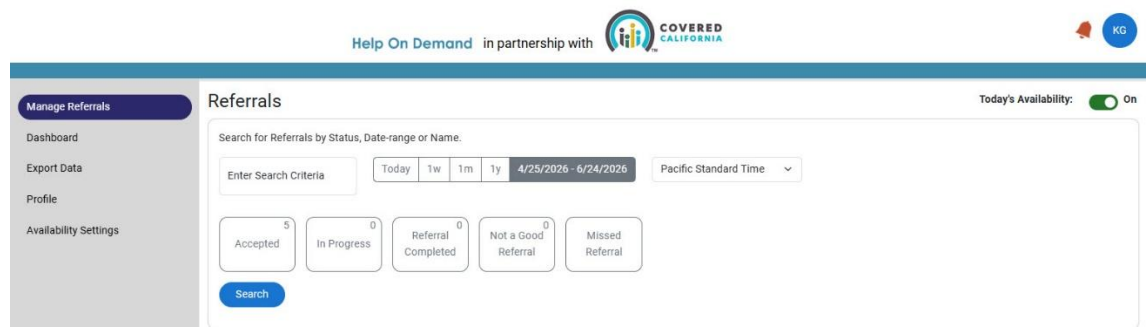
If you select **Email Only**, you will receive only email notifications for new referrals. Due to the fast-paced nature of Help On Demand, you are strongly encouraged to receive text messages or app notifications in addition to email notifications. Email-only notifications can cause delays and missed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

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



The login page features the Help On Demand logo, a Username field, a Password field with a toggle for visibility, a checked 'Remember Me' checkbox, a 'Log In' button, and links for 'Forgot Username?' and 'Forgot Password?'. A small disclaimer at the bottom states: '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.



The Manage Referrals page shows a sidebar with links: Manage Referrals, Dashboard, Export Data, Profile, and Availability Settings. The main content area is titled 'Referrals' and includes a search bar with filters for Today, 1w, 1m, 1y, and a date range of 4/25/2026 - 6/24/2026. It also displays a summary of referral counts: Accepted (5), In Progress (0), Referral Completed (0), Not a Good Referral (0), and Missed Referral (0). A 'Search' button is located at the bottom of the summary section. The top right of the page shows 'Today's Availability' set to 'On'.

4. Availability Settings

Manage Referrals

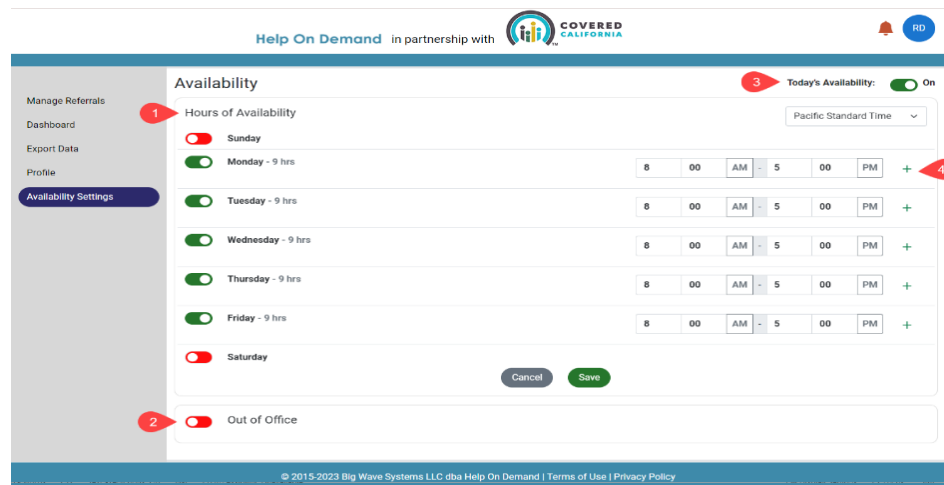
Dashboard

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.



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.