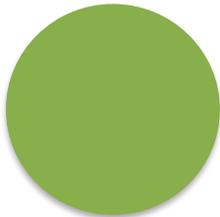


CalSAWS

| Welcome to BenefitsCal:
Training for Community Based Organizations



BenefitsCal

Community Based Organizations (CBOs) can use BenefitsCal to help people apply and manage their benefits.

In BenefitsCal, CBO staff can have either a CBO Manager account or a CBO Assister account.

Who uses a CBO Manager account?

CBO Manager Accounts are for leaders or people in charge at the CBO. They can oversee the work of their staff, who are called CBO Assisters.

Who uses a CBO Assister account?

CBO Assisters are usually staff members who work for CBO Managers. If you need a CBO Assister account, ask your CBO Manager to make one for you.

What can CBO Accounts do?

Both CBO Manager and Assister accounts can submit applications, upload documents, generate reports, and more.

BenefitsCal

- BenefitsCal can be used to apply for the below programs. Click on the links for a brief overview of each program. Please note that individuals can only apply for General Assistance in a County office.
 - [Medi-Cal](#)
 - [CalFresh](#)
 - [CalWORKs](#)
- Currently, CBOs can only use BenefitsCal for applications and reports. CBOs cannot view case information. Once Release of Information (ROI) functionality is added, the CBO will be able to view case information IF an individual has submitted the ROI for the CBO. ROI functionality is currently scheduled for implementation at the end of 2026, although this is subject to change.

BenefitsCal

Training Material

- **BenefitsCal_Videos:** <https://www.youtube.com/channel/UCCdgEsuQPySaAShiE-msz7Q>
- **BenefitsCal Quick Reference Guides:** [Community Based Organizations \(CBOs\) Dashboard \(calsaws.org\)](https://calsaws.org)

Available
in [YouTube](#)
today

21

Micro Videos

23

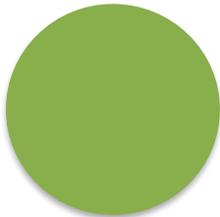
Quick Reference
Guides

Available on
[CalSAWS.org](https://calsaws.org)

All users of BenefitsCal are responsible for ensuring that Personally Identifiable Information (PII) of clients is protected and safeguarded. Safeguarding client information is not just best practice – it's the law.

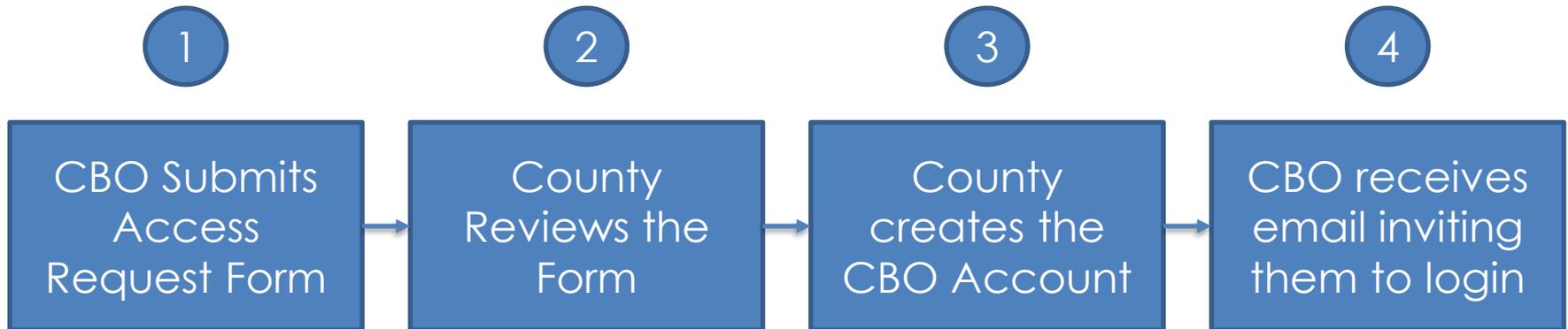
- Handle client documents discreetly, secure them when unattended, and ensure only authorized individuals view or access them. This includes client information displayed on BenefitsCal screens,
- Always double check PII is for the correct individual when entering in BenefitsCal, as well as uploading documents.
- When providing documents to clients face-to-face, ensure that you have verified their identity and the client is being given their own information, and not someone else's.
- Always double check addresses before mailing sensitive information,
- When discussing PII, make sure you're in an area where you can maintain privacy and not be overheard by others

Create an Account



BenefitsCal

CBO Access Request Process



Considerations before you request a CBO Manager Account:

- A CBO Assister account can be created in real-time by a CBO Manager account.
- BenefitsCal CBO users who already have an account for use in another county, do not need a new account.
- BenefitsCal CBO accounts can submit applications for any county that has adopted BenefitsCal.

BenefitsCal: CBO Access

Manager v Staff

Feature	Manager	Staff
Login	X	X
Apply for Benefits	X	X
Upload Documents	X	X
View Reports on their customer applications	X	X
Export reports to Excel	X	X
View all applications for their staff	X	
View Reports that include all applications for their staff	X	
Resume an application on behalf of their staff	X	
Add/Remove staff within their organization	X	
Create a referral campaigns	X	
View and track referral campaigns	X	X

BenefitsCal

You can request a CBO account to gain access to BenefitsCal, on this screen below:

BenefitsCal

Apply For Benefits ▾ Programs ▾ Help & Resources English ▾ Log In

Use C4Yourself Login

Log In

Email (required)

Password (required)

[Forgot Your Password?](#)

Log In

Create New Account

An account let's you see your application status and easily renew your benefits.

Create Account

Community Based Organizations (CBO)

Help people apply for benefits and check their application status.

Register Your CBO Account

Click Login

Select to Register Your CBO Account

BenefitsCal

Fill out the requested information to complete the access request

Fill out the requested information

Register your Community Based Organization.

Organization Name (required)

Primary Contact First Name (required)

Primary Contact Last Name (required)

Address Line 1 (required)

Address Line 2

City (required)

State

California

County (required)

-Select One-

Zip Code (required)

Mobile Phone (required)

(###) ###-####

Email (required)

I understand and agree to the [Terms and Conditions](#).

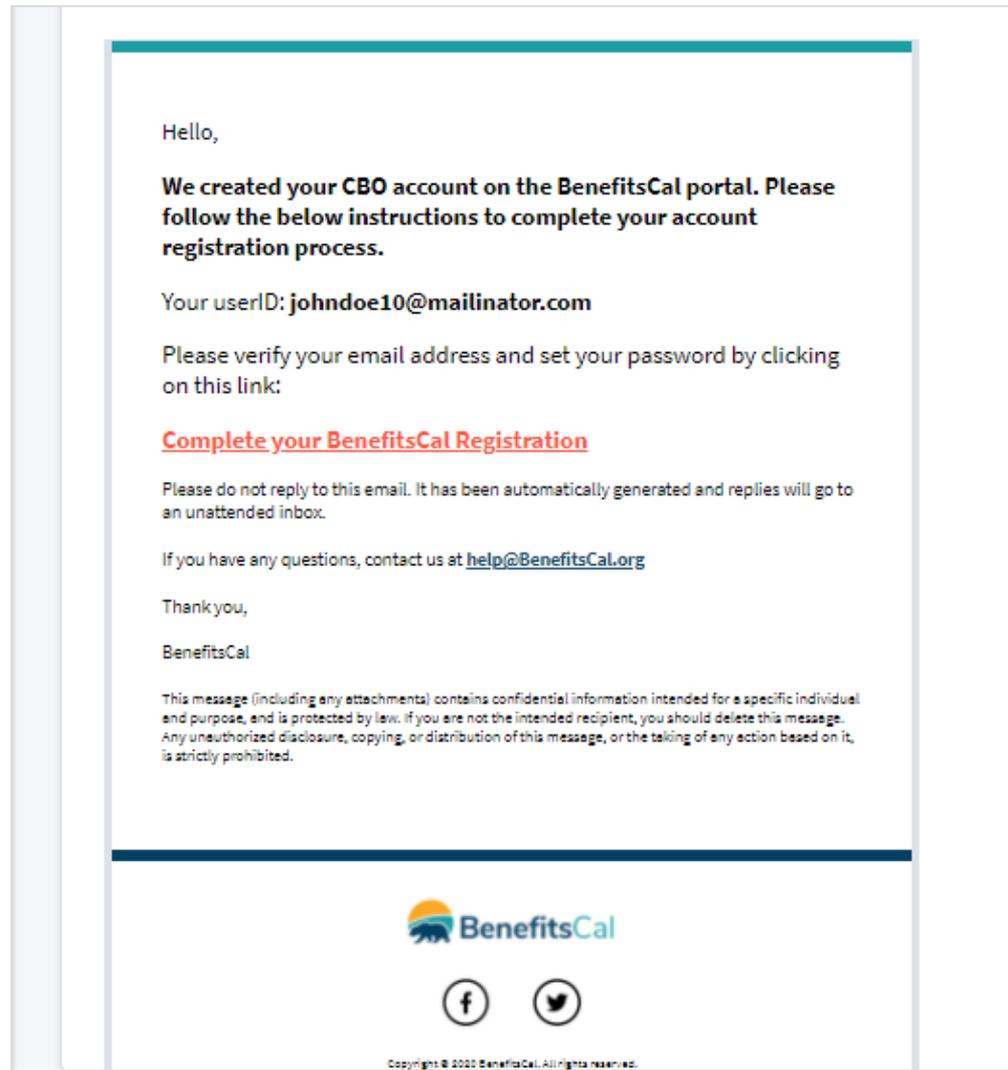
Register

Click the drop list and select the county you assist the most often

Click "register" to submit the request

BenefitsCal

Once approved by the county, you'll receive an email inviting you to login to BenefitsCal, like this below:



Request a CBO Account



Good to know...

- CBOs will request access through an online form, that is routed to the County for review and setup within ForgeRock
- CBOs must request access (online form)
- Two roles: CBO Manager and CBO Staff
- CBO Managers can add additional staff at their organization (no need to request from the County)

As a CBO Manager you can add your own staff accounts.

CBO Access

Managers can grant access to their staff

Look at all you've accomplished!

You are on a roll!

1 You submitted 1 applications this month.

Submit Documents
Upload documents for an application or case to any county.
[UPLOAD A DOCUMENT](#)

Staff Applications
Manage your staff's applications.
[View Staff Applications](#)

Applications [New Application](#)

4 In Progress [View](#)

3 Submitted [View](#)

1 Received

0 Processed

0 Not Acc

0 Documents

6 Applications Need Documents [View](#)

[View My Applications](#)

My Reports
View key metrics about application you've created and submitted.

0 Applications Submitted This Week

0 Applications Processed This Month

[View Reports](#)

Staff Management
Manage your staff's information and BenefitsCal accounts.
[Manage Staff](#)

Help & Resources

[Program Details](#)

[Contact County](#)

[View Help Center](#)

CBO Managers can add staff accounts in real-time

Click "Add Staff"

BenefitsCal Home Applications nM

< Back to Dashboard

Staff Management [ADD STAFF](#)

Staff Name
All

Staff Status
 Active Inactive

practbo2 practbofirst2	VIEW
FName LName	VIEW
assistorReturns assistorReturns	VIEW

CBO Access

Managers can grant access to their staff

Fill out basic information on the Staff Member

Let's create an assister account.

First Name (required)

Last Name (required)

Email (required)

Mobile Phone

Address Line 1

Address Line 2

City

State

County

Zip Code

CREATE ASSISTER ACCOUNT

Click "create" and the Staff Member will get an email to login

Frequently Asked Questions (FAQs)

CBO Account Access

Q: Do I need to request access in every County?

A: No, you only need to request access once. If you already have an account in BenefitsCal, you can continue to use the same account credentials across the counties.

Q: How long will it take to get access?

A: Access requests are processed by each County staff.

Q: What if a CBO did not get their account set up email?

A: CBO should check their spam or junk folders. They could also try to reset their password on BenefitsCal.com by clicking on forgot password.



Apply for Benefits

BenefitsCal: CBO

Begin a New Application

Look at all you've accomplished!

You are on a roll!

2 You submitted 2 applications this month.

Applications [New Application](#)

1 In Progress	View
2 Submitted	View
0 Received	View
0 Processed	View
0 Not Accepted	View

Documents Needed

2 Applications Need Documents	View
--------------------------------------	----------------------

[View My Applications](#)

Start a New Application

Video

[Apply for Benefits](#)

BenefitsCal: How to Resume an Application

Select “In Progress” applications to finish and submit.

Click “In Progress” to review Draft Applications

Click “Continue” to resume the application

Look at all you've accomplished!

You are on a roll!
2 You submitted 2 applications this month.

Applications [New Application](#)

- 1 In Progress [View](#)
- 2 Submitted [View](#)
- 0 Received [View](#)
- 0 Processed [View](#)
- 0 Not Accepted [View](#)

Documents Needed

- 2 Applications Need Documents [View](#)

[View My Applications](#)

Type the applicant name, or the application number/status to filter the results.

Filter

IN PROGRESS SUBMITTED RECEIVED PROCESSED NOT ACCEPTED DOCUMENTS NEEDED

Results (2)

Application Number	Continue
112534	
Last Name: Jane	First Name: Mary
Application Status: In Progress	Start Date: 09/07/2021
Remove Application	

Application Number	Continue
112536	
Last Name: Mays	First Name: Mandy
Application Status: In Progress	Start Date: 09/07/2021
Remove Application	

BenefitsCal: How to Upload Documents after applying

Select "Submitted" applications to finish and submit

Click "Submitted" to upload more documents

The screenshot shows a dashboard with a 'New Application' button at the top right. Below it is a list of application statuses, each with a 'View' button:

- 1 In Progress
- 2 Submitted
- 0 Received
- 0 Processed
- 0 Not Accepted

At the bottom, there is a 'Documents Needed' section showing '2 Applications Need Documents' with a 'View' button. A 'View My Applications' button is at the very bottom.

Click "View Details"

The screenshot shows the 'View Details' page for an application. It includes a 'Back to Dashboard' link, the title 'Applications', and a filter input field. Below the filter is a 'Results (4)' section with two application cards:

- Application 1:** Application Number 108471, Last Name King, First Name Pumpkin, Application Status Submitted, Action Items 2 Documents Needed.
- Application 2:** Application Number 108988, Last Name Anna, First Name Apple, Application Status Submitted, Action Items 2 Documents Needed.

Click "Upload" to upload more documents

The screenshot shows the 'Application Details' page for application 112532. It includes a 'Back to Dashboard' link, the title 'Application Details', and a filter input field. Below the filter is a 'Results (4)' section with two application cards:

- Application 1:** Application Number 108471, Last Name King, First Name Pumpkin, Application Status Submitted, Action Items 2 Documents Needed.
- Application 2:** Application Number 108988, Last Name Anna, First Name Apple, Application Status Submitted, Action Items 2 Documents Needed.

Below the application cards is a 'Verification Details' section with two 'Upload Needed' items:

- Photo ID/Social Security Card (Derek Jones (20))
- Citizenship Verification/Birth Certificate (Derek Jones (20))

At the bottom, there is an 'Upload History' section and a large 'UPLOAD DOCUMENT' button.

Frequently Asked Questions (FAQs)

Applications

Q: Can I track the status of the application after it's submitted?

A: Yes, right from the CBO dashboard – select to view the application for a status or export a report to excel. Please note: the application status will display; the ineligibility reason code will not display as it requires a Release of Information (ROI) form.

Q: Can I upload more documents after submitting the application?

A: Yes, access the previously submitted application and select to “upload documents” to upload more. CBO users can only upload for apps in “In Progress” or “Submitted” statuses.

Q: What if someone goes on vacation – who can help the client to complete their application?

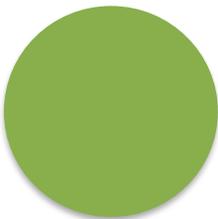
A: CBO Managers can view all applications (including in progress) for all staff within their organization and can resume and complete an application for a resident.

Q: Can CBO users see the application summary for a customer?

A: A PDF application summary is only available to download on the confirmation screen, immediately after the application is submitted.

Q: Can CBO users see case numbers?

A: A CBO user can see the case number for CalFresh applications, submitted through their account, when the application is converted to case, which occurs around the time a county worker begins to process the application.



CBO Dashboard

CBO Dashboard: Manager

View all applications for the organization

Look at all you've accomplished!

You are on a roll!
0 You submitted 0 applications this month.

Staff Applications
Manage your staff's applications.
[View Staff Applications](#)

Applications [New Application](#)

- 0 In Progress [View](#)
- 0 Submitted [View](#)
- 0 Received [View](#)
- 0 Processed [View](#)
- 0 Not Accepted [View](#)

Documents Needed
0 Applications Need Documents [View](#)

[View My Applications](#)

My Reports
View key metrics about application you've created and submitted.

- 0 Applications Submitted This Week
- 0 Applications Processed This Month

[View Reports](#)

Staff Management
Manage your staff's information and BenefitsCal accounts.
[Manage Staff](#)

Help & Resources

- [Program Details](#)
- [Contact County](#)

[View Help Center](#)

View Reports that include all apps for the organization

Add/Remove Staff within their organization

CBO Dashboard: Staff

After logging in, this dashboard displays for CBO Staff users.

The screenshot shows the BenefitsCal dashboard for a staff user named Jane. The dashboard is divided into several sections:

- Navigation Menu:** Located at the top, it includes the BenefitsCal logo, navigation links for Applications, Reports, and Help & Resources, a language dropdown set to English, and a user profile icon labeled JD.
- Personalized Greeting:** A dark blue banner at the top left says "Hi, Jane".
- Accomplishments:** A section titled "Look at all you've accomplished!" features a "You are on a roll!" card with a gear icon and the text "You submitted 0 applications this month."
- Applications:** A central card titled "Applications" with a "New Application" button. It lists application statuses: In Progress, Submitted, Received, Processed, and Not Accepted, each with a "View" button. Below this is a "Documents Needed" section with "Applications Need Documents" and a "View" button. A "View My Applications" button is at the bottom.
- My Reports:** A card titled "My Reports" with the subtitle "View key metrics about application you've created and submitted." It shows two metrics: "Applications Submitted This Week" and "Applications Processed This Month," both with gear icons and a value of 0. A "View Reports" button is at the bottom.
- Help & Resources:** A card titled "Help & Resources" with icons for "Program Details" and "Contact County." A "View Help Center" button is at the bottom.

Four green callout boxes highlight these sections: "Navigation Menu" (top left), "Applications" (middle left), "Reports" (middle right), and "Help Resources" (bottom right).

Frequently Asked Questions (FAQs)

CBO Account Access

Q: Will I be able to upload SAR7 documents for clients?

A: Yes, if you have the customer's case number, you can upload a SAR7 form through document upload.

Q: When can we view more information about the application including the reason for denial (if applicable)?

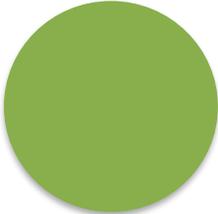
A: A Release of Information (ROI) form is required to provide access to this information. This new functionality will be available at a still to be determined future date.

Q: What data is included in CBO reports?

A: The export includes application number, programs, county, submission date, application status, and staff name (for CBO Managers only).



CBO Referral URL



CBO Referral URL

FAQs

Q: What information can the CBO see when an application was submitted via referral URL?

A: Only aggregate counts for submitted applications by county and programs.

Q: Is there a limit on the number of CBO referrals URLs that a CBO can create?

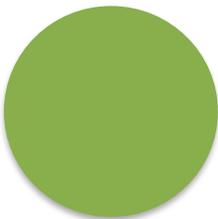
A: No.

Q: Can the whole organization see the referral URLs?

A: Yes, the referral URLs and the associated data is connected to the whole organization.

Q: Do CBO Managers and Assister have the same functionality?

A: No. CBO Managers can create or archive a referral URL, view campaign data, and generate reports. CBO Assisters can see the active referral URLs and view campaign data.



Help Features

BenefitsCal

Help Center

The screenshot shows the BenefitsCal Help Center interface. At the top, there is a dark blue header with the BenefitsCal logo on the left, navigation links for 'Applications', 'Reports', and 'Help & Resources' in the center, a language dropdown menu set to 'English' on the right, and a user profile icon labeled 'ff' in the top right corner. Below the header is a teal horizontal bar. The main content area is titled 'Help Center' and features a list of six help topics, each in a white card with a light gray shadow. Each card includes an icon, a title, a brief description, and a right-pointing chevron arrow.

- Frequently Asked Questions (FAQs)**
Get answers to common questions about applications, benefits, and more.
- How to Apply for Benefits**
- Program Rules**
Know your rights and responsibilities when applying for benefits.
- Program Descriptions**
Learn about each program including how to qualify and the papers you need.
- Acceptable Documents for Verification**
Learn more about required papers you may need to upload for verification.
- Learning Tools**

BenefitsCal

How-to Videos

The screenshot shows the BenefitsCal YouTube channel page. At the top left is the BenefitsCal logo, which features a stylized bear silhouette. To the right of the logo is the channel name 'BenefitsCal' and a red 'SUBSCRIBE' button. Below the logo are navigation tabs: HOME, VIDEOS, PLAYLISTS, COMMUNITY, CHANNELS, and ABOUT. A search icon is located to the right of the ABOUT tab. The main content area is titled 'Uploads' and includes a 'SORT BY' dropdown menu. A grid of video thumbnails is displayed. A green callout bubble with white text says 'Everything we covered today is included in this 15-minute video!'. The video 'BenefitsCal: Community Based Organizations' is highlighted with a red rectangular box. Below the grid, there are two more video thumbnails: 'How to Reset Your Password' and a video showing a woman and a man with text overlays: 'Submit Applications', 'View CBO Dashboards', and 'Create & Manage CBO Accounts'.

BenefitsCal

HOME VIDEOS PLAYLISTS COMMUNITY CHANNELS ABOUT

Uploads SORT BY

Periodic Reporting 4:26

BenefitsCal: Periodic Report (SAR7) 624 views • 3 months ago

Dis Co

BenefitsCal: D CalFresh 175 views • 3 months ago

di-Cal Renewals 6:17

BenefitsCal: How to submit a Cal renewal. 1.3K views • 3 months ago

BenefitsCal: How to Link an account to your case 1:36

BenefitsCal: How to create an account 2:19

624 views • 3 months ago

175 views • 3 months ago

1.3K views • 3 months ago

398 views • 4 months ago

627 views • 4 months ago

Community Based Organizations 15:30

BenefitsCal: Community Based Organization (CBO)... 1.4K views • 5 months ago

How to Apply for Benefits 3:08

BenefitsCal: How to apply for benefits 3.1K views • 5 months ago

How to Report a Change 2:46

BenefitsCal: How to report a change 2.3K views • 5 months ago

How to Upload a Document 2:14

BenefitsCal: How to upload a document 5.9K views • 5 months ago

How to Link a Case 1:36

BenefitsCal: How to link a case 7.4K views • 5 months ago

Customer Dashboard Overview 3:57

BenefitsCal: Customer Dashboard Overview 954 views • 5 months ago

How to Reset Your Password

Submit Applications
View CBO Dashboards
Create & Manage CBO Accounts

Quick Reference Guides

Please see below for the BenefitsCal Quick Reference Guides for Community Based Organizations (CBOs) who do not have access to the Learning Management Solution (LMS). The CalSAWS Project is working to add a new screen to BenefitsCal to host CBO materials.

- Quick Guide: Apply for Benefits
- Quick Guide: CBO Referral Campaign
- Quick Guide: Community Based Organization Request Access
- Quick Guide: Create an Account for New Users
- Quick Guide: Customer Dashboard
- Quick Guide: Disaster CalFresh Benefits
- Quick Guide: Electronic Benefits Transfer (EBT)
- Quick Guide: Find Your Caseworker
- Quick Guide: Link to Case
- Quick Guide: Messages and Actions
- Quick Guide: Opt into Electronic Notices
- Quick Guide: Periodic Reporting
- Quick Guide: Renewal
- Quick Guide: Report a Change
- Quick Guide: Request an Appointment
- Quick Guide: Reset Password
- Quick Guide: Student App
- Quick Guide: Two-Step Verification
- Quick Guide: Upload Documents
- Quick Guide: Upload Documents within an Application
- Reference Guide: Community Based Organizations (CBOs) Dashboard

Everything we covered today is included in this Reference Guide