Cal**SAWS** |

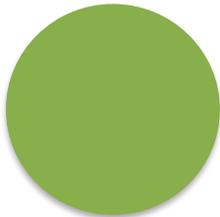## Welcome to BenefitsCal:
Training for Community Based Organizations

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 or 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)

Available in YouTube today

Available on CalSAWS.org

21

Micro Videos

23

Quick Reference Guides

BenefitsCal
Confidentiality

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.
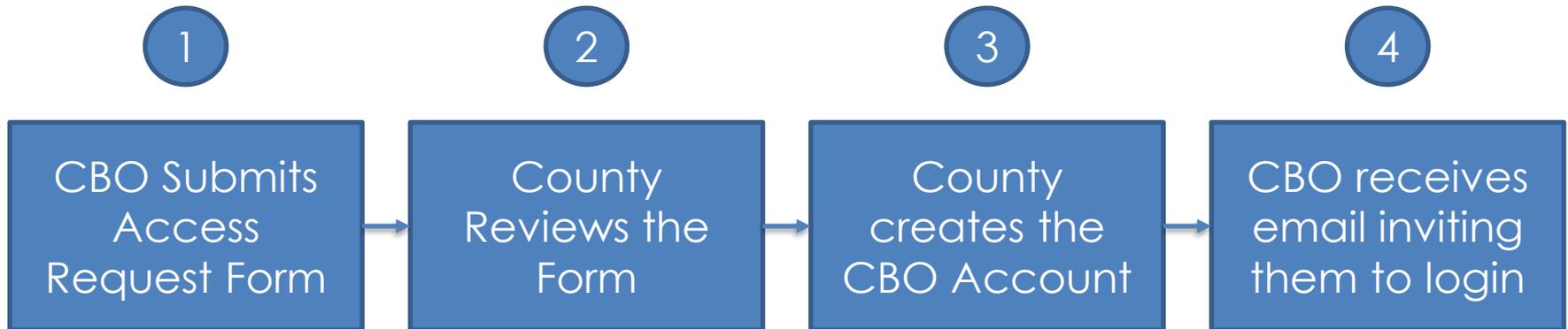
- Handle client documents discreetly, secure them when unattended, and ensure only authorized individuals view or access them. This includes client information displayed on BenefitsCal screens,
- Always double check PII is for the correct individual when entering in BenefitsCal, as well as uploading 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
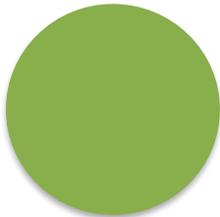
BenefitsCal
CBO Access Request Process

```
  (1)            (2)            (3)            (4)
```

| CBO Submits Access Request Form | → | County Reviews the Form | → | County creates the CBO Account | → | CBO receives email inviting them to login |

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

Fill out the requested information to complete the access request

BenefitsCal

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

Hello,

We created your CBO account on the BenefitsCal portal. Please follow the below instructions to complete your account registration process.

Your userID: **johndoe10@mailinator.com**

Please verify your email address and set your password by clicking on this link:

Complete your BenefitsCal Registration

Please do not reply to this email. It has been automatically generated and replies will go to an unattended inbox.

If you have any questions, contact us at **help@BenefitsCal.org**

Thank you,

BenefitsCal

This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delete this message. Any unauthorized disclosure, copying, or distribution of this message, or the taking of any action based on it, is strictly prohibited.

BenefitsCal

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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

My Reports
View key metrics about application you've created and submitted.
0 Applications Submitted This Week   0 Applications Processed This Month
View Reports

Applications   New Application
4 In Progress   View
3 Submitted   View
1 Receive
0 Process
0 Not Acc

Staff Management
Manage your staff's information and BenefitsCal accounts.
Manage Staff

Help & Resources
Program Details   Contact County
View Help Center

Docume
6 Applications Need Documents   View
View My Applications

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

🔒 pratcbo2 pratcbofirst2   VIEW
🔒 FName LName   VIEW
🔒 assistorReturns assistorReturns   VIEW

CBO Access
Managers can grant access to their staff

Let's create an assister account.

First Name (required)

Last Name (required)

Email (required)

Mobile Phone

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

Address Line 1

Address Line 2

City

State

California

County

-Select One-

Zip Code

CREATE ASSISTER ACCOUNT

Fill out basic information on the Staff Member

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.

BenefitsCal: How to **Upload Documents after applying**

Select "Submitted" applications to finish and subm[it]

Click "Submitted" to upload more documents

Click "Upload" [to] upload m[ore] documen[ts]

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

< Back to Dashboard

Applications

Let's review your applications.

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

Filter

IN PROGRESS

Click "View Details"

Results (4)

Application Number	
108471	View Details
Last Name	First Name
King	Pumpkin
Application Status	Action Items
Submitted	2 Documents Needed

Application Number	
108988	View Details
Last Name	First Name
Anna	Apple
Application Status	Action Items
Submitted	2 Documents Needed

Application Details
112532

Application Details

First Name	Last Name
Derek	Jones
Date of Birth	Application Date
//2001	09/07/2021
Application Status	Case Number
Submitted	Not Assigned

Verification Details

Upload Needed

Application Date — 0 Days Ago

Photo ID/Social Security Card
Derek Jones (20)

Upload

Citizenship Verification/Birth Certificate
Derek Jones (20)

Upload

Upload History

Below are the receipts for the documents you've uploaded in the past year.

You don't have any upload receipts at this time.

UPLOAD DOCUMENT

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

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.

Navigation Menu

Applications

Reports

Help Resources

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
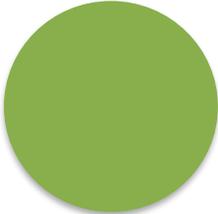
CBO Referral URL
FAQs

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.
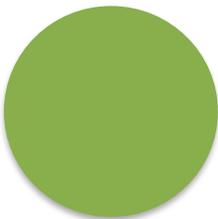
Help Features

BenefitsCal
Help Center

BenefitsCal
How-to Videos

BenefitsCal
Quick Reference Guides

CalSAWS

News   Meetings ⌄   System Updates   **BenefitsCal**

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