BenefitsCal | Reference Guide: Community Based Organizations (CBOs) Dashboard

Purpose: This BenefitsCal Reference Guide contains information on items found on the Assistor and Manger CBO Dashboard.

Table of Contents

This Reference Guide includes the following tasks performed by BenefitsCal CBO assistors and managers within the BenefitsCal system.

Assistor

1 **Welcome to BenefitsCal – Homepage**

Click the **Login** button to login or request to create a CBO account.

2

BenefitsCal > Login

Log in to BenefitsCal using your **Email** and **Password**.

Need to request access, click the **Register Your CBO Account** button. Complete form to register your community based organization.

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

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CBO Assister Dashboard

The BenefitsCal assistor dashboard displays four (4) unique areas on the screen.

User Menu – can be accessed at the top of each screen.

Applications – allows the user to start a new application and see how many applications are in the progress, submitted, received, and processed.

My Reports – displays applications submitted this week and applications approved this month.

Help & Resources – provides access to program details and allows the user to contact the County.
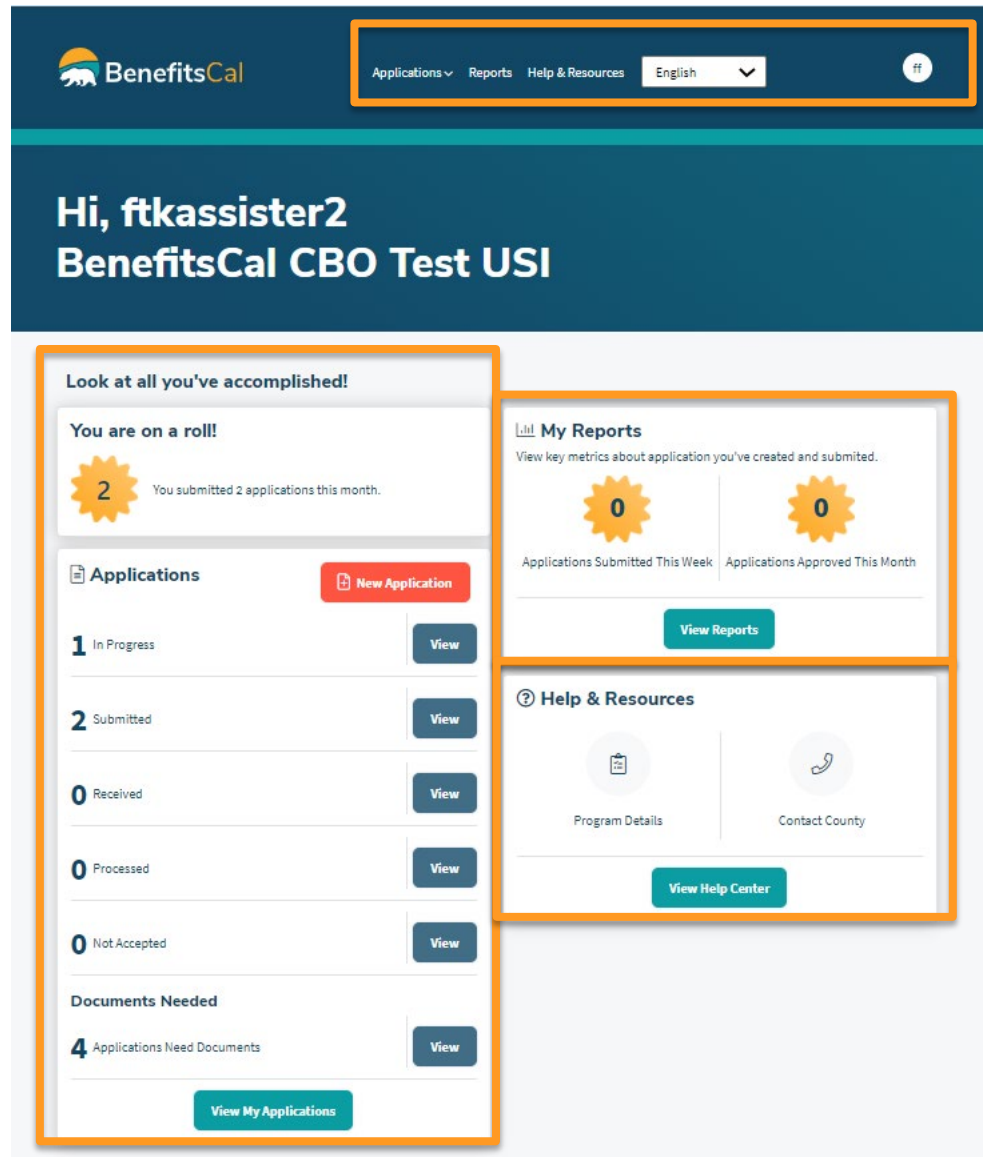
4

CBO > Dashboard > User Menu

The customer can find several resources on the User Menu.

BenefitsCal logo – returns the user back to the dashboard from any page.

Applications – provides access to create a new application or view current applications

Reports – provides access to reports for each status.

Help & Resources – provides access to blank forms (Periodic Reports), find an office near their location, and view FAQs.

Language – displays the language selected from the drop list.

User Initials – provides access to Account Settings, Help and Resources and log out.

Hi, ftkassister2
BenefitsCal CBO Test USI
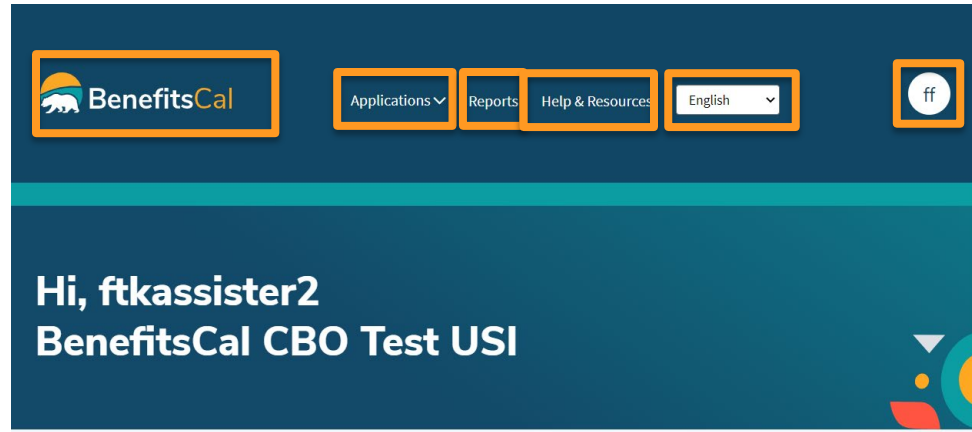
5

Dashboard > Manage Your Account

Click on the [ff] icon. Your Account Settings opens to allow customers to make changes to password, update security questions, and enable /disable two-step verification.

Below **Help & Resources** in the drop list is the **Log Out** button.

Review the QG "Two-Step Verification" for instructions for setting up two-step verification.

BenefitsCal

Applications ⌄   Reports   Help & Resources   English ⌄   [ff]

Your Account Settings

Name
ftkassister2 ftkassister2

Email
ftkassister2@mailinator.com

Phone
2436446530

Password   ›

Security Questions   ›

Two-Step Verification
Disabled   ⬤
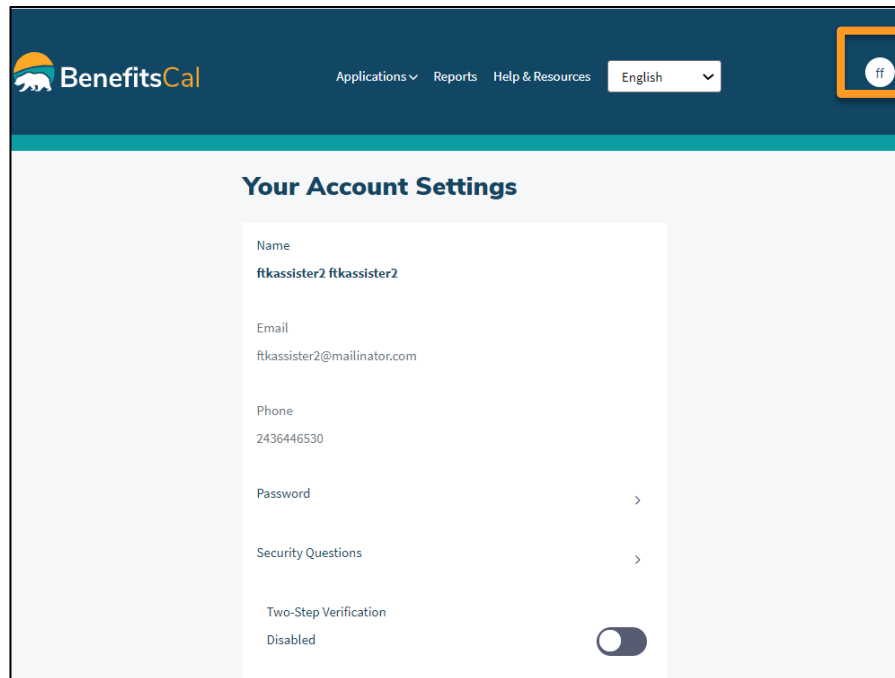
6

CBO > Dashboard > Help & Resources

Under the **Help & Resources** section, the customer can find blank forms (Periodic Reports), find an office near their location, and view FAQs.

Below **Help & Resources** in the drop list is the **Log Out** button.

CBO > Dashboard

Applications:
The Your Applications and Cases section includes a high-level view of applications statuses.

In Progress status will display how many applications are in progress and not yet ready to submit.
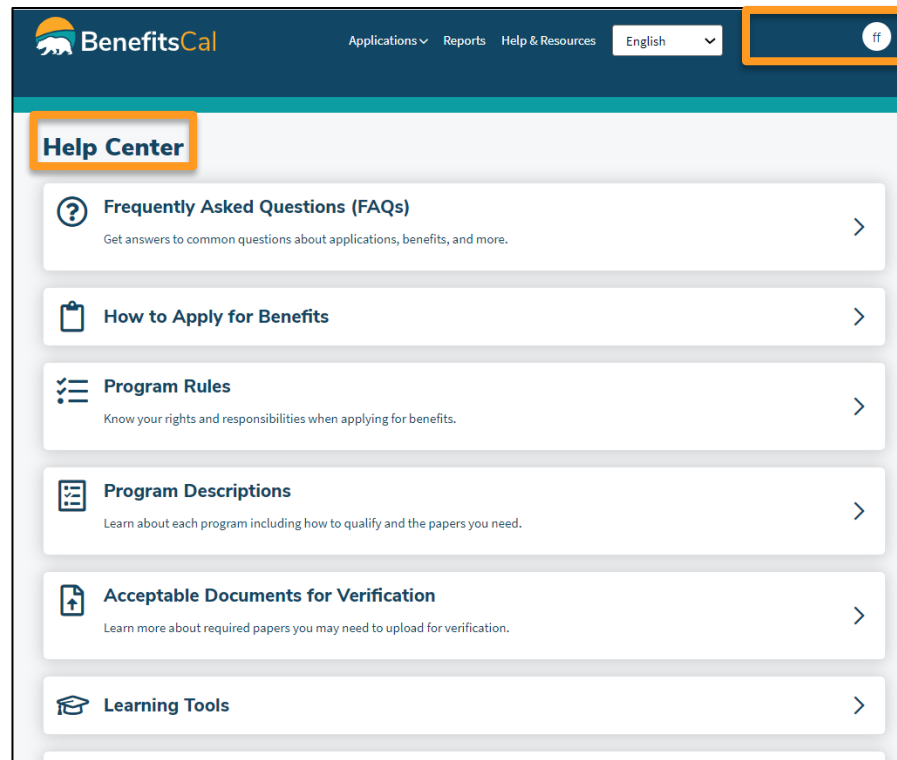
Submitted status displays how many applications have been sent over to CalSAWS for the month.
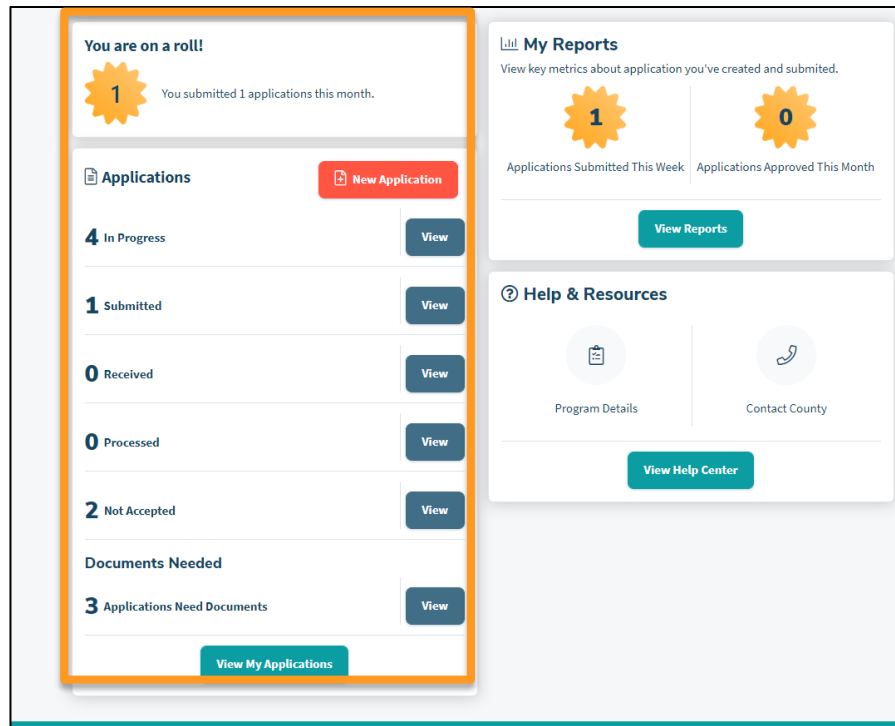
Received status displays the number of applications that have been received by the county.

Process status displays the number of applications the county has processed from the CBO/FBO.

Not Accepted status displays the number of applications the county has not accepted.

Documents Needed displays the number of applications with documents to upload.

Click the **View** button next to the status to see applications in the selected status.

You are on a roll!

1   You submitted 1 applications this month.

📄 **Applications**   📄 **New Application**

4 In Progress   View

1 Submitted   View

0 Received   View

0 Processed   View

2 Not Accepted   View

Documents Needed

3 Applications Need Documents   View

View My Applications

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

1   **0**

Applications Submitted This Week   Applications Approved This Month

View Reports

❓ **Help & Resources**

📋   📞

Program Details   Contact County

View Help Center

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CBO Assistor Dashboard > Applications

A tile displays each application the CBO/FBO created.

Each tile displays the following:

- ✓ Application Number
- ✓ Application Name
- ✓ Application Status
- ✓ Documents Needed
- ✓ Remove Application (In Progress only)

Click the **View Details** button to see information about that application.

‹ 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 | SUBMITTED | RECEIVED | PROCESSED | NOT ACCEPTED | DOCUMENTS NEEDED |

Results (4)

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

Application Number		Continue
108473		
Last Name	First Name	
Dollface	Sally	
Application Status	Start Date	
✏ In Progress	07/27/2021	

🏛 Remove Application

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

Application Number		Continue
108990		
Last Name	First Name	
Bacon	Barbie	
Application Status	Start Date	
✏ In Progress	08/02/2021	

🏛 Remove Application

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CBO Assistor Dashboard > Applications > Application Details

Application Details – displays application information

Verification Details – displays documents needed and provides a simple way to upload documents by clicking the **Upload** button.

Upload History – displays the last 12 months of documents uploaded to an application.

Upload Document – provides a way to upload other documents.

Delete Application – deletes the application from the system. After 12 months applications not submitted will drop off.

Application Details for
108473

Application Details

First Name	Last Name
Sally	**Dollface**
Date of Birth	Application Date
//1985	**07/27/2021**
Application Status	Case Number
In Progress	**Not Assigned**

Verification Details

Upload Needed

Application Date   6 Days Ago

⊘ **Photo ID/Social Security Card**   [Uploaded]
    Sally Dollface (36)

ⓘ **Citizenship Verification/Birth**   [Upload]
    Certificate Sally Dollface (36)

Upload History

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

Photo ID/Social Security Card   Sally Dollface (36)

07/27/2021   View Receipt

[UPLOAD DOCUMENT]

[🗑 DELETE APPLICATION]

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CBO Assistor Dashboard > Reports

The CBO/FBO can see all their applications. Choose the Report period by entering a date in the **Date From** and **Date To** fields and clicking the **Apply** button.

Each tile displays a program and the status of each application in the date range requested.

Click **Export Data** to create a report in MS Excel.

CBO Dashboard > Help Center > Program Details

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Program Descriptions displays each program available with a brief description. Click on a program tile to view details about the program.

At the bottom of the page **Apply Now** or **See If You Qualify** buttons are available.

Program Descriptions

🛒 **CalFresh (Food)** ›
Add to your food budget and get help putting healthy food on the table with the CalFresh Program.

💵 **CalWORKs (Cash Aid)** ›
Helps with cash to pay for rent, housing, food, clothing, and utilities for families with at least once child in the home.

💗 **Medi-Cal (Health Coverage)** ›
Medi-Cal is free or low-cost health insurance for individuals or families. It includes help paying for private health care, such as premium assistance via a federal tax credit.

🏠 **Disaster CalFresh**
Helps with the food needs of people within a 30-day period after a flood, fire, earthquake, or other natural disaster.

🏥 **County Medical Services Program (CMSP)**
Temporary health coverage for uninsured low-income adults that are not eligible for other health care programs, who live in a CMSP County. If you apply for Medi-Cal, the county will check to see if you qualify. View participating counties

🤝 **General Assistance or General Relief(GA/GR)**
Relief and support to adults who are not supported by their own means, other public funds, or programs.

🌐 **Cash Assistance Program for Immigrants (CAPI)**
Cash aid to elderly, blind, and disabled people who are legally in the country. Recipients must not be able to get Supplemental Security Income/State Supplemental Payment (SSI/SSP) due to immigration status.

💼 **Welfare-to-Work (WtW)**
If you receive CalWORKs and can work, you must take part in Welfare-to-Work activities to continue to receive cash aid. Welfare-to-Work is the Employment Program of the California Work Opportunity and Responsibility to Kids Program (CalWORKs).

🌱 **General Relief Opportunities for Work (GROW)**
Provides work and training to help employable General Relief (GR) customers get jobs for individuals who live in Los Angeles County.

Ready to apply or find out what you might be eligible for?

| **Apply Now** | **See If You Qualify** |

Help Center > Contact County

Call Me. allows you to leave a message for the County to call you back during regular business hours.

Select Your County drop list and find the county. Click on the **CALL ME** button and enter your **First Name**, **Last Name**, and **Phone Number** and click the **Submit** button.

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Help Center > View Help Center

From the bottom of the Customer Dashboard, select the Take me to the help center hyperlink for help content. Alternatively, from the User Menu, select Help and Resources.

The Help Center has several resources to assist.

Select any tile to open for detailed information.

Training videos are also available on YouTube within the BenefitsCal channel for easy access.

BenefitsCal   Applications ⌄   Reports   Help & Resources   [English ⌄]   (ff)

Help Center

(?) 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   >

📹 How-to Videos   >

EBT & Surcharge-free ATM Locator   >

Chat with a county representative
Need more help? Chat with a caseworker during regular business hours.   >

📞 Call Me
Don't have time to chat? Leave us your phone number and a brief message, and we'll call you back during normal business hours.   >

Manager:

Manager Dashboard

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The CBO manager has the same access as an assistor and the following:

View Staff Applications – shows all staff members applications.

View Reports – displays reports for all staff or an individual.

Staff Management – allows the manager to mark as inactive for an assistor or add new assistors.

Look at all you've accomplished!

You are on a roll!

3 You submitted 3 applications this month.

📋 **Staff Applications**

Manage your staff's applications.

View Staff Applications

📄 **Applications**   🔲 New Application

2 In Progress   **View**

3 Submitted   **View**

0 Received   **View**

0 Processed   **View**

0 Not Accepted   **View**

Documents Needed

3 Applications Need Documents   **View**

View My Applications

📊 **My Reports**

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

3   **0**

Applications Submitted This Week   Applications Approved 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

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Manager Dashboard > View Staff Applications

Managers can choose to look at all Staff Applications or individual applications by clicking **Staff Name** drop list and selecting staff member.

Staff Status displays when Active or Inactive is selected.

Click the tile to see the applications in the status selected.

Managers can complete applications for staff but can't re-assign to other staff members to complete.

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Manager Dashboard > Reports

The Manager can see all their staff members applications.

Choose the Report period by entering **Date From** and **Date To.**

Click a staff member or all from the **Staff Name** drop list.

To see the Report, click the **Apply** button.

Each graph displays the application status for each program in the date range requested.

Click **Export Data** to create a report in excel.

Reports

Let's review your reports.

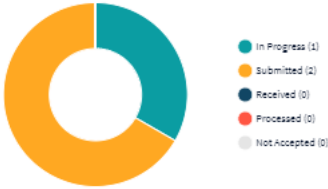Use the date filter to select a date range or select the name of a staff member

Date From	Date To
07/12/2021	08/12/2021

Staff Name

All

APPLY

CalFresh Applications

3 Total

- In Progress (1)
- Submitted (2)
- Received (0)
- Processed (0)
- Not Accepted (0)
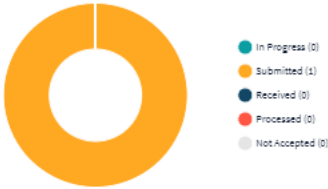
Date Range : 07/12/2021 - 08/12/2021

Assister : All Staff

Export Data

Health Coverage Applications

2 Total

- In Progress (0)
- Submitted (1)
- Received (0)
- Processed (0)
- Not Accepted (0)

Date Range : 07/12/2021 - 08/12/2021

Assister : All Staff

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Manager Dashboard > Staff Management

Managers can add assistors and view staff information and mark a staff member as inactive.

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Manager Dashboard > Staff Management > Add Staff

The manager can complete the Let's create an assister account form. Complete the form and click the **CREATE ASSISTER ACCOUNT** button.

BenefitsCal

Applications ∨   Staff Management   Reports   Help & Resources   English ∨   fM

Let's create an assister account.

First Name (required)

Last Name (required)

Phone (required)
(###) ###-####

Email (required)

Address Line 1

Address Line 2

City

State
California

County
-Select One-

Zip Code

CREATE ASSISTER ACCOUNT