

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 Dashboard](#)

[Applications](#)

[My Reports](#)

[Help & Resources](#)

[Manager Dashboard](#)

[Applications](#)

[My Reports](#)

[Staff Management](#)

Assistor

1

Welcome to BenefitsCal – Homepage

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

The screenshot shows the BenefitsCal homepage. At the top, there is a navigation bar with the BenefitsCal logo, links for 'Apply For Benefits', 'Programs', and 'Help & Resources', a language dropdown set to 'English', and a 'Login' button highlighted with an orange border. Below the navigation bar, there is a user status area showing 'YES - test date111' and 'YES (1) test date111' with a 'STATUS' link. The main content area features a large blue banner with the text 'Welcome to BenefitsCal.' and a sub-header 'Here you can apply for Medi-Cal, CalFresh and CalWORKs. Ready? Let's do this.' Below this banner are two buttons: 'Apply Now' and 'See If You Qualify'. To the right of the banner is a photograph of a family. Below the banner, there is a section titled 'What programs are available?' with the sub-header 'Great question. Find the programs that are right for you and your family.' This section contains three program cards: 'Disaster Food Assistance' with a house icon, 'Food' with a vegetable basket image, and 'Cash Aid' with a family in a kitchen image. Each card includes a brief description and a 'Learn more' link.

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.

The screenshot shows a web interface with two main columns. The left column is titled "Log In" and contains two input fields: "Email (required)" and "Password (required)". Below the password field is a link that says "Forgot Your Password?". At the bottom of this column is a red "Log In" button. The right column has two sections. The top section is titled "Create New Account" and includes a sub-header "Create New Account" with a key icon, a short paragraph explaining the benefits of an account, and a teal "Create Account" button. The bottom section is titled "Community Based Organizations (CBO)" with a group of people icon, a sub-header "Community Based Organizations (CBO)", a short paragraph explaining the purpose, and a teal "Register Your CBO Account" button. Both the "Log In" section and the "Community Based Organizations (CBO)" section are highlighted with an orange border.

3

CBO Assister Dashboard

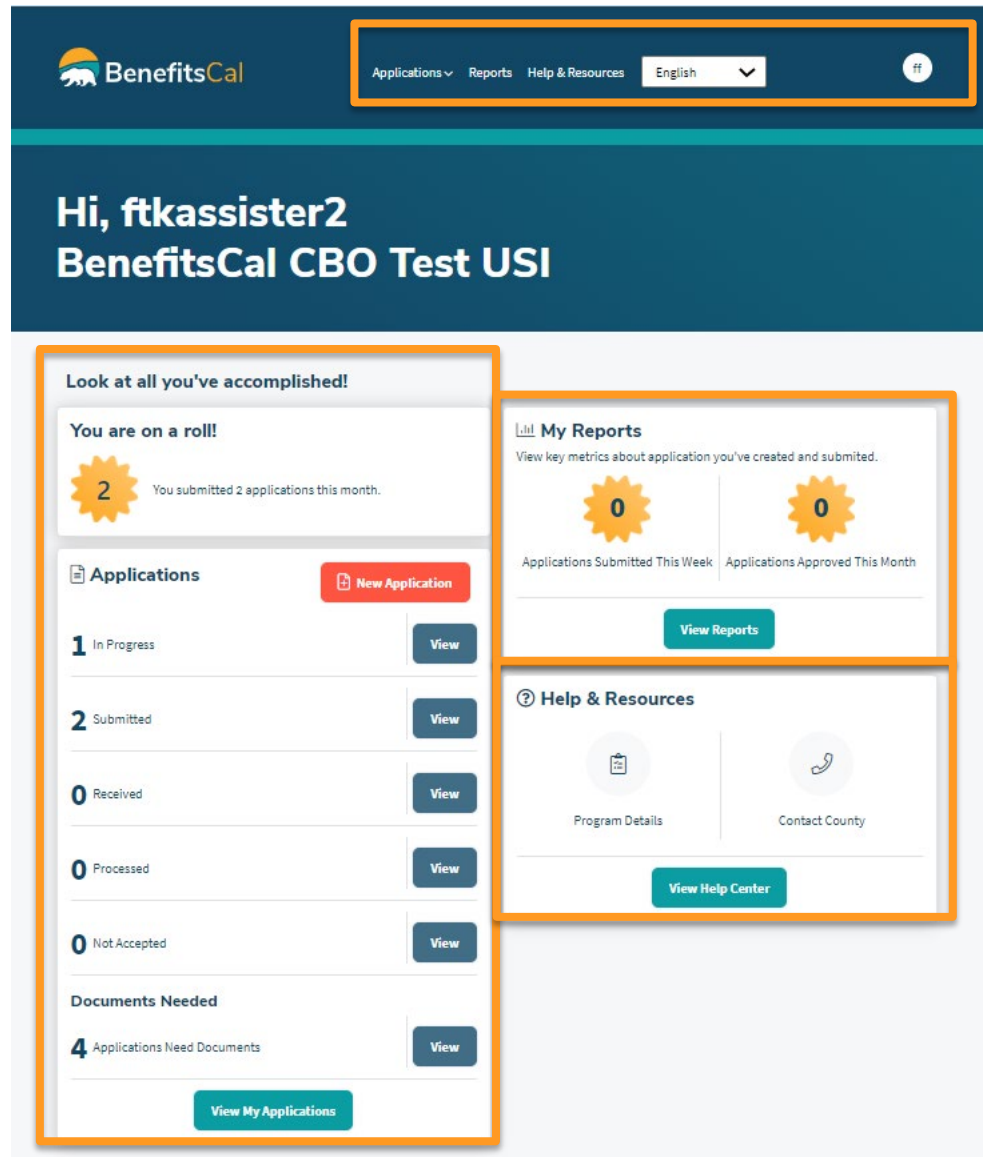
The BenefitsCal assister dashboard displays four (4) unique areas on the screen.

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.

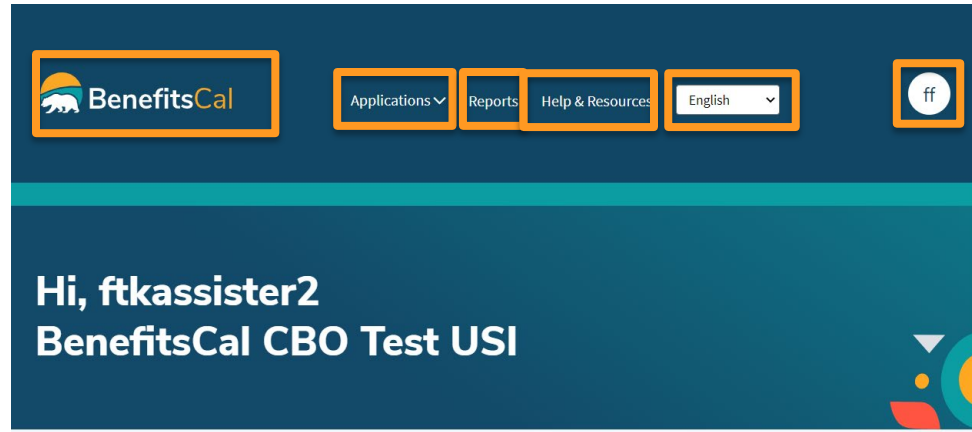
Applications – provides access to create a new application or view current applications

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.



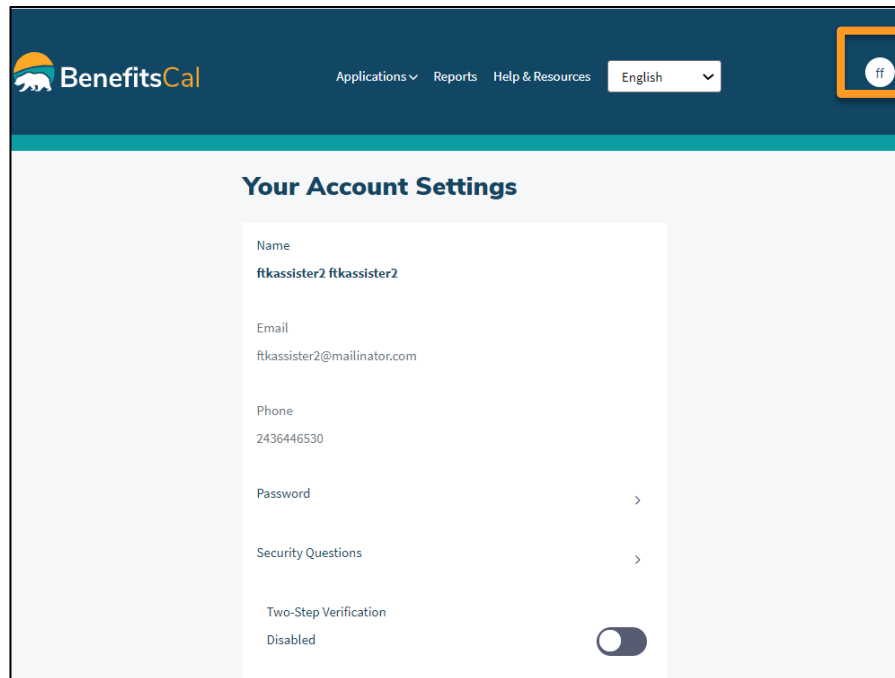
5

Dashboard > Manage Your Account

Click on the  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.

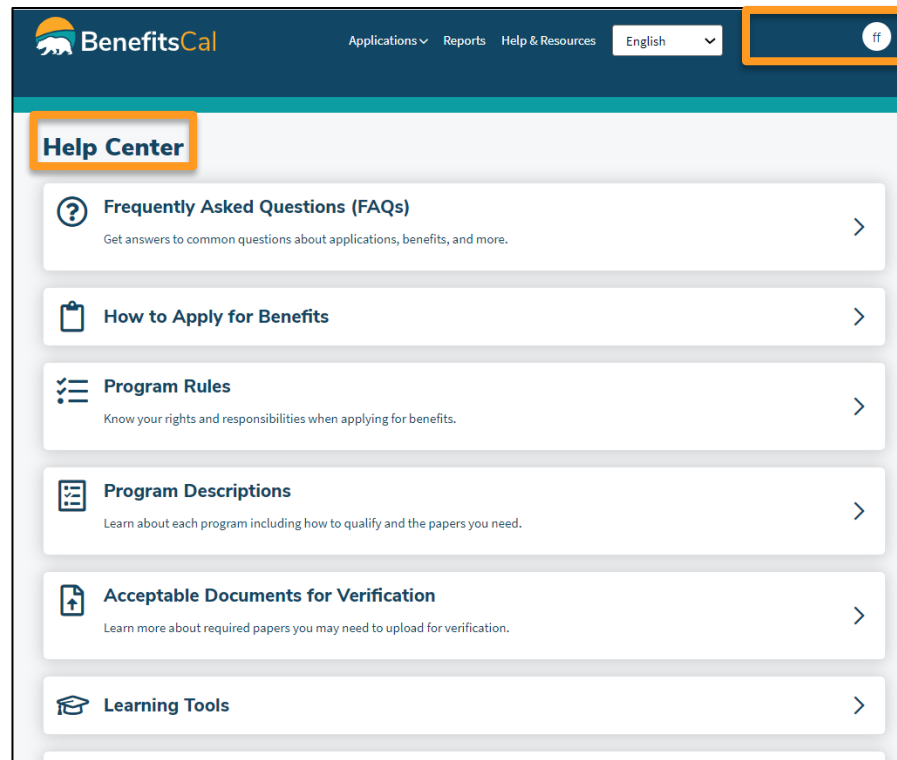


6

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.



7

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.

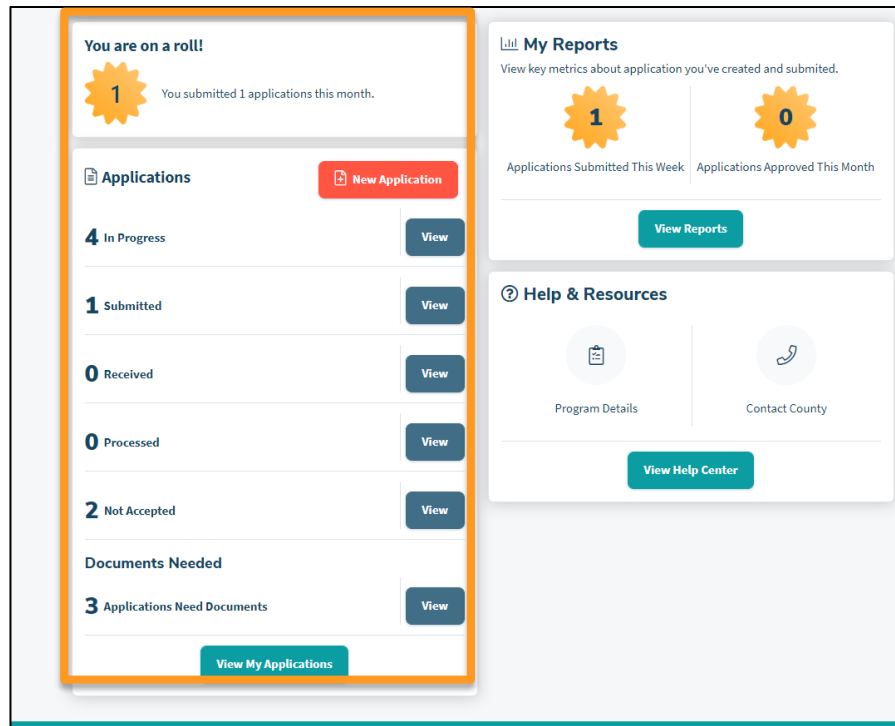
Received status displays the number of applications that have been received by the county.

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.



8

CBO Assistor Dashboard > Applications

A file displays each application the CBO/FBO created.

Each file 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	Last Name	First Name	Application Status	Action Items	Buttons
108471	King	Pumpkin	Submitted	2 Documents Needed	View Details
108473	Dollface	Sally	In Progress	07/27/2021	Continue, Remove Application
108988	Anna	Apple	Submitted	2 Documents Needed	View Details
108990	Bacon	Barbie	In Progress	08/02/2021	Continue, Remove Application

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

Verification Details

Upload Needed

Application Date 6 Days Ago

<input checked="" type="radio"/> Photo ID/Social Security Card Sally Dollface (36)	<input type="button" value="Uploaded"/>
<input type="radio"/> Citizenship Verification/Birth Certificate Sally Dollface (36)	<input type="button" value="Upload"/>

Upload History

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

Photo ID/Social Security Card 07/27/2021	Sally Dollface (36) View Receipt
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UPLOAD DOCUMENT

DELETE APPLICATION

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.

The screenshot shows the BenefitsCal interface. At the top, there is a navigation bar with the logo, 'Applications', 'Reports', 'Help & Resources', and a language dropdown set to 'English'. Below this is a 'Back to Dashboard' link. The main section is titled 'Reports' and includes the text 'Let's review your applications' and 'Use the date filter to select a date range'. A date filter box is highlighted with an orange border, containing 'Date From' (07/03/2021) and 'Date To' (08/02/2021) fields, and an 'APPLY' button. Below the filter is a 'CalFresh Applications' tile with a shopping cart icon. It displays '3 Total' and a donut chart showing the status distribution: In Progress (1), Submitted (2), Received (0), Processed (0), and Not Accepted (0). The date range '07/03/2021 - 08/02/2021' is shown below the chart. An 'Export Data' button is highlighted with an orange border at the bottom of the tile. Below the CalFresh tile is a 'Health Coverage Applications' tile with a heart icon.

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.

The screenshot displays a list of social service programs under the heading "Program Descriptions". Each program is represented by a card with an icon, a title, a brief description, and a right-pointing arrow. The "CalWORKs (Cash Aid)" card is highlighted with an orange border. At the bottom of the list, there is a section titled "ready to apply or find out what you might be eligible for?" which contains two buttons: "Apply Now" (a teal button) and "See If You Qualify" (a white button with a teal border). Both the "CalWORKs" card and the bottom buttons are also highlighted with orange borders.

Program Name	Description
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.

12

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.

The screenshot shows the 'Call Me' page on the BenefitsCal website. At the top, there is a navigation bar with the BenefitsCal logo, 'Applications', 'Reports', 'Help & Resources', and a language dropdown set to 'English'. Below the navigation bar, there is a white content area with a blue header. The header contains a link '< Back to Help Center' and the title 'Call Me.'. Below the title, there is a sub-header: 'To get started, please enter your details below.'. This is followed by a 'Select Your County' dropdown menu with 'San Bernardino' selected. Below the dropdown, there is a message: 'Great! Select the button below to leave your information and a county representative will reach out.'. At the bottom of this section is a red 'CALL ME' button.

The screenshot shows the 'Call Me' form on a mobile device. The form has a blue header with the BenefitsCal logo and the title 'Call Me'. Below the header, there is a sub-header: 'Let us know how to contact you and we'll give you a call'. The form contains three input fields: 'First Name', 'Last Name', and 'Phone Number'. Below the input fields is a red 'Submit' button and a blue 'Cancel' link.

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 file to open for detailed information.



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

A screenshot of the BenefitsCal Help Center interface. The top navigation bar includes the BenefitsCal logo, menu items for Applications, Reports, and Help & Resources, a language dropdown set to English, and a user profile icon. The main content area is titled "Help Center" and lists several resource categories, each with an icon, title, brief description, and a right-pointing 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**
- 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:

14

Manager Dashboard

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.

The screenshot displays the Manager Dashboard with the following sections:

- Look at all you've accomplished!**
 - You are on a roll!**: A star icon with the number 3 and the text "You submitted 3 applications this month."
 - Staff Applications**: A card with a folder icon, the text "Manage your staff's applications.", and a "View Staff Applications" button.
- My Reports**: A card with the text "View key metrics about application you've created and submitted." and two star icons: one with 3 for "Applications Submitted This Week" and one with 0 for "Applications Approved This Month". A "View Reports" button is located below.
- Applications**: A list with a "New Application" button and a "View" button for each item:
 - 2 In Progress
 - 3 Submitted
 - 0 Received
 - 0 Processed
 - 0 Not Accepted
- Staff Management**: A card with a person icon, the text "Manage your staff's information and BenefitsCal accounts.", and a "Manage Staff" button.
- Help & Resources**: A card with a question mark icon, two icons for "Program Details" and "Contact County", and a "View Help Center" button.
- Documents Needed**: A card with the text "3 Applications Need Documents" and a "View" button. A "View My Applications" button is located at the bottom.

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.

BenefitsCal

Applications ▾ Staff Management Reports Help & Resources English ▾ fM

< Back to Dashboard

Staff Applications

Staff Name: All ▾

Staff Status: Active Inactive

john doe 🔒

0 In Progress	0 Submitted	0 Received	0 Processed
0 Not Accepted			

jack ryan 🔒

0 In Progress	0 Submitted	0 Received	0 Processed
0 Not Accepted			

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

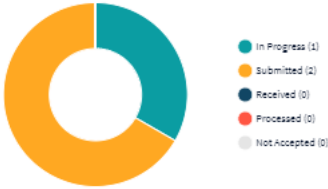
Date From: 07/12/2021 Date To: 08/12/2021

Staff Name: All

APPLY

CalFresh Applications

3 Total

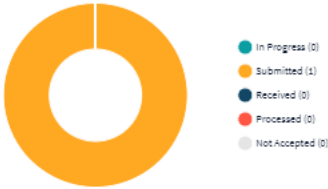


Date Range : 07/12/2021 - 08/12/2021
Assister : All Staff

[Export Data](#)

Health Coverage Applications

2 Total



Date Range : 07/12/2021 - 08/12/2021
Assister : All Staff

17

Manager Dashboard > Staff Management

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

Applications ▾ Staff Management Reports Help & Resources English ▾

[Back to Dashboard](#)

Staff Management

ADD STAFF

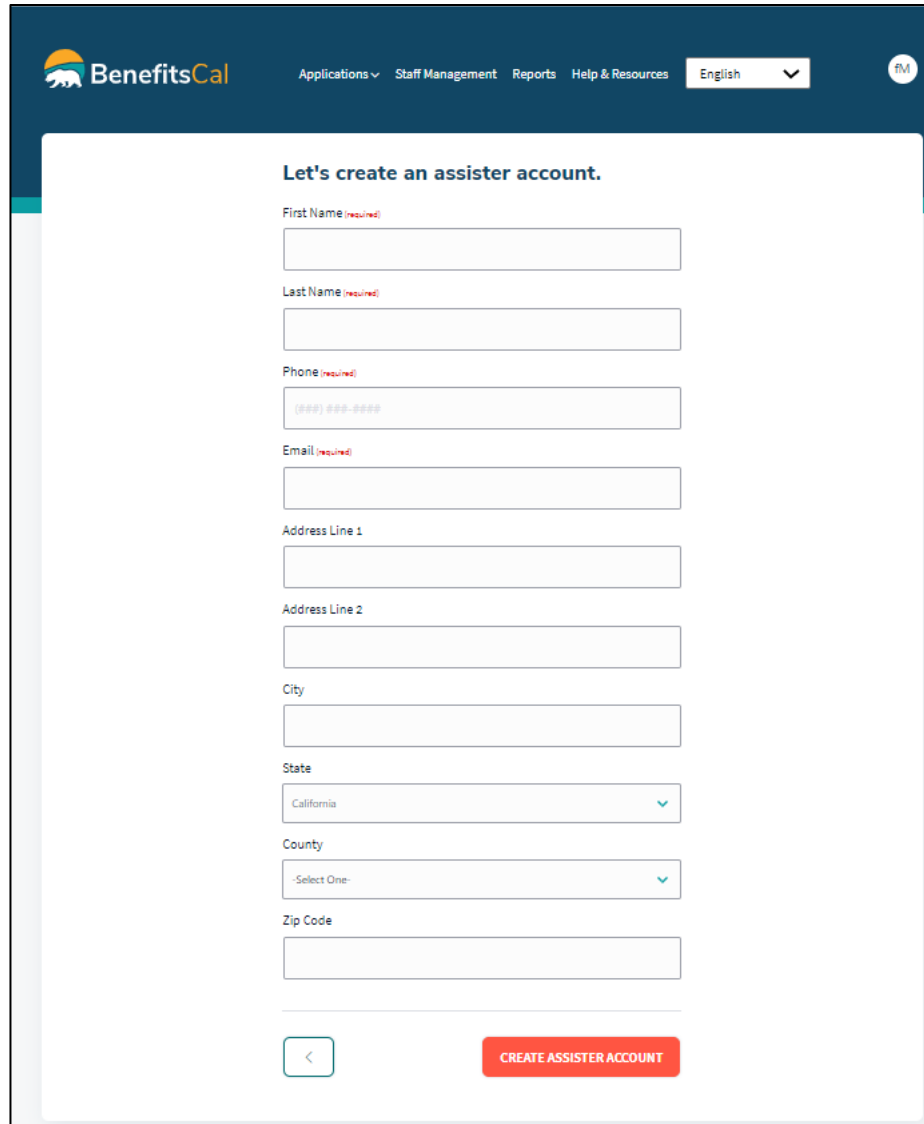
Staff Name
All ▾

Staff Status
 Active Inactive

<input checked="" type="checkbox"/> kia mark	VIEW
<input checked="" type="checkbox"/> liam dwer	VIEW
<input checked="" type="checkbox"/> zoey jack	VIEW

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.



The screenshot shows the 'Let's create an assister account' form in the BenefitsCal system. The form is titled 'Let's create an assister account.' and includes the following fields:

- First Name (required)
- Last Name (required)
- Phone (required) with a placeholder '(999) 999-9999'
- Email (required)
- Address Line 1
- Address Line 2
- City
- State (dropdown menu, currently showing 'California')
- County (dropdown menu, currently showing '-Select One-')
- Zip Code

At the bottom of the form, there is a back arrow button and a red button labeled 'CREATE ASSISTER ACCOUNT'.