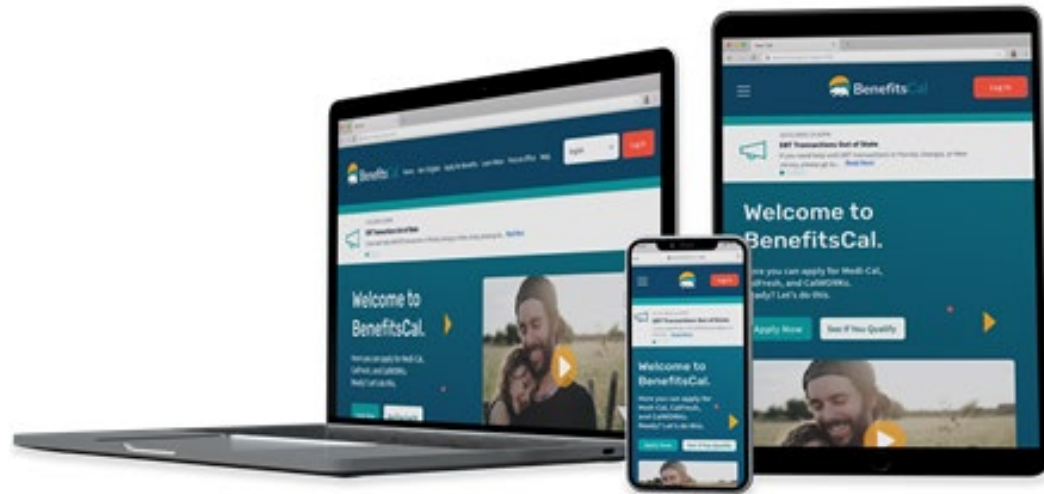


CalSAWS | BenefitsCal Training Discovery Session



04/06/21

Our Objective

To learn what training would be most helpful to you, to support users of BenefitsCal

But first...

**Here is some background information about the
BenefitsCal Training UCD Research**

Here's what we heard from UCD research

The top-3 reported challenges with current portals:

Application Questions – Words Matter.

- Customers encounter issues completing an application with accurate information due to **word choice** and limited translation options.
- Customers are **uncertain how to answer** because the **questions are not always clear or relatable**.
- Also, the application is **not currently available in all threshold languages**, which creates barriers for customers who can more easily navigate questions in their native language.

Account Management – Hard to recover.

- Customers have **difficulties both creating an account** and **resetting their passwords**.
- Additionally, since customers only periodically access their account, **they often forget their password** and the answers to their security questions, preventing them from being able to manage their benefits online without creating a new account.

Document Upload – Confusion.

- Customers find the process of uploading documents **confusing and challenging**.
- Often customers feel uncertain about **which category to use to classify their documents**, leading to confusion on the county's end about verifications have been submitted.
- Customers **worry about whether their documents have been successfully submitted** and received by the county. Customers will often call a county to make sure they have completed what is asked.

UCD Research

Significant Pain Points

“

The **language that's used in the application portals is sometimes too technical and not colloquial**. The field that the website is asking for are hard to understand for clients. ”

Advocate, MyBCW

“

With C4Y, I can't get online because it's telling me that my social doesn't match what they have on file, and **no matter how many times I call I can't get a hold of anybody just to have access to it online**. ”

Customer, C4Y

“

Clients, especially the older population, have **problems uploading documents because they don't know about uploading files**. The older population tends to not even want to try. ”

Advocate, YBN

“

I have had to reset my password, and it was a **hassle to get the username to reset the password** because I **couldn't remember which email I used**. ”

Customer, MyBCW

We want your feedback!

Next the fun part – we asked a few questions about training materials and expectations.

For Customers

These are the results

What are the most frequently asked questions from Customers when using the current Portals?

How do I reset my password?

Link or unlink my account please. i dont know how

how do i.....

I don't remember why my benefits are lower this time

I don't remember my email for password reset
how do i.....

How do I reset my password?

I'm stuck and I dont know why its giving me an error

i don't know why my benefits are lower this time

Can I get a receipt for my

Link or unlink my account please. i dont know how

I don't remember my email for password reset

of my documents?

How do I know if I provided all the verification needed

Please write a response here

How do I contact someone for help



now what happens? who or

I'm stuck and I dont know why its giving me an error

How does unlink my account mean

Can I get a receipt for my documents? What is the status of my documents?

Fun!

How do I upload a document

How do I know if I provided all the verification needed

How do I create a signature



now what happens? who or

I dont remember my secret questions
How do I contact someone for help

How do I contact someone for help

What are the most frequently asked questions from Customers when using the current Portals?

How do i link my account?

Need help resetting password.
How do I reset my password?
I forgot my security questions.. Can I just start over?

Have a technical issue like a glitch stopping them.



I have an e-app confirmation number.. how do I know it was received because I haven't gotten a call yet?

It is asking for my pin to e-sign my sar 7 but I don't know what that is or how to do it.

How do I know my documents will be received by the county?

Please write a response here

How can I complete my SAR 7 on the website? It keeps coming in blank when I submit it

I dont remember my password

I didn't get the form posted on c4yourself.com.. I didn't know my report was incomplete.

How do I reset my password? I don't remember my security answers

I don't remember what email address I used when I created the account

I submitted an application, but I don't know if it went through.

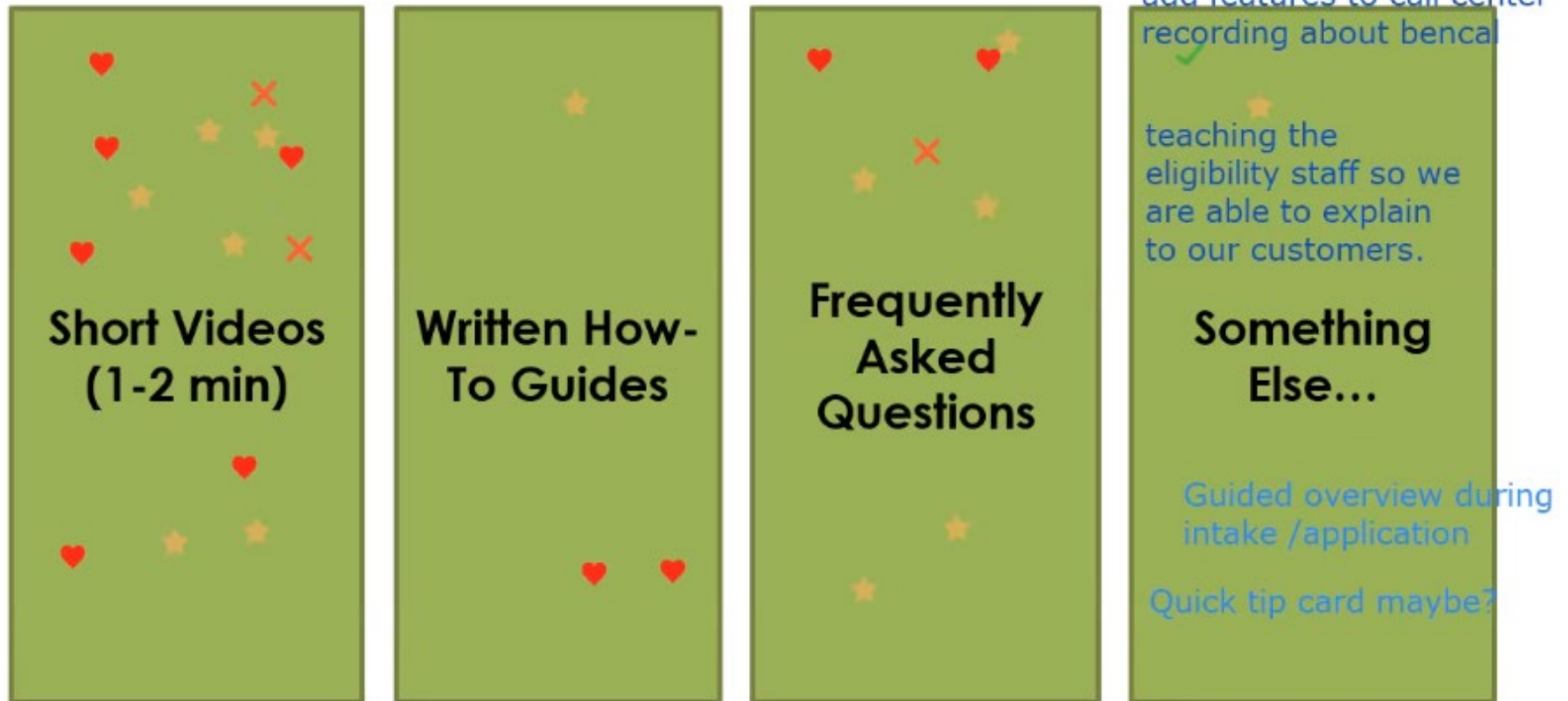
i dont remember my email address or password to my email

How to upload documents

i dont have access to the email i used

What format would be most helpful for training materials for Customers?

These are the results



For Caseworkers, Counties, and CalSAWS Staff

Based on your experience assisting portal users, what training topics would you want to see for BenefitsCal?

★ Ability to review documents right after they are uploaded.

- ★ Best practices for eligibility staff
- ★ to guide customers through using BenefitsCal
- ★ Staff knowledge of the site
- ★ overall, easy quick help.

Please write a response here

★ ★ How to upload documents

★ Staff understand what they can do to help, expectation. ★

the functionality of each page

Document upload

How to report a change ★

★ How a CBO Manager/Assistor account gets set up/approved

★ troubleshooting when errors occur ★ ❤️

What format would be most helpful for training materials for you (Caseworkers, Counties)?

Participants placed a stamp on the box indicating their vote

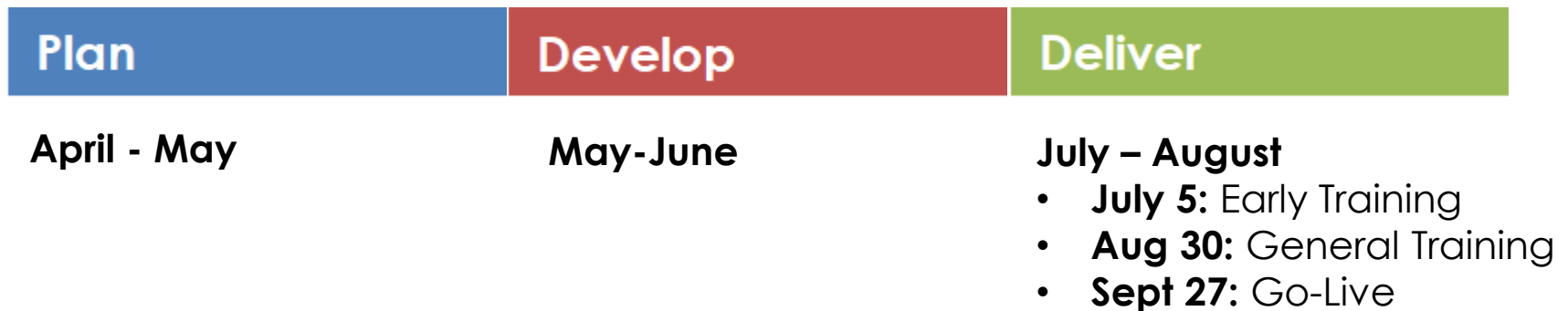


Up to five min

Next Steps

Here's what the team will do next:

- 1. Request:** If you have any additional ideas, please shoot us a note by Friday 04/16/21.
portalactionitems@CalSAWS.org
- 2. Action Item:** The BenefitsCal team will create a training plan for review.



Scope

Training Plan



How to Videos

To assist Customers with a common task (example creating an account). Also, for workers to see what the customer sees.



Job Aids

For Counties and Administrators with screenshots allowing the worker to assist the customer with needs.



User Guides

For CBOs/FBOs to navigate their dashboards, reports, account settings, view staff applications.