BenefitsCal | Quick Guide: Apply for Benefits

Purpose
The purpose of this BenefitsCal Quick Guide is to provide instructions to assist customers with applying for benefits online.

The following program applications are supported:
- CalFresh
- CalWORKs
- Medi-Cal
- CMSP
- GA/GR
- Disaster CalFresh

High-Level Process Flows

FAQs
Q: Can a customer apply for Cash Assistance and later apply for food assistance?
A: Customers may apply for programs at any time using BenefitsCal. Customers may have multiple applications with different start dates but only one in progress.
Welcome to BenefitsCal – Homepage

The homepage provides a summary of programs to customers. This is the starting point of an application.

Click the **SEE IF YOU QUALIFY** button to pre-screen for eligibility.

Customers do not need to login or create an account to apply. However, it is helpful to have an account to track the application processing status after submission.

Click the **APPLY NOW** button to begin an application.

Apply: Getting Started

Information on the application process is provided to you and the following carets are available.

**What to expect**: Sets the expectation of what information and documents are asked in the application and what are the steps to complete the application.

**Types of documents you might need to upload**: Helps the customer understand what documents are needed and whose documents need to be uploaded.

**Interview Tips**: The county will reach out to schedule an interview. The customer can select the day(s) and the part of day that works best.

Click the **BEGIN** button.
Helpful tips explain to the customer what each item means on following pages.

Click the **NEXT** button.

The Diversity, Equity, and Inclusion Statement is for the customer to read.

Click the **NEXT** button.
Sentiment Check

Sentiment checks are used to determine how customers feel about starting an application. This is an optional question.

Information is collected at the start and at the end to measure how customers feel about the application process. The project team uses this to improve the customer experience (CX) process over time.

Click the button that best applies.

Click the NEXT button.

Application Summary

The Application Summary displays the different sections of the application.

The first three sections unlock one at a time (user must complete them in order).

After the Household Details section is complete, all sections (Job and Income, Expenses, Assets and Other Situations) become available to the user (section status is changed to "Not Reviewed" and the icon is an opened lock), meaning they can go through the sections in the order they choose.

Click the START button.
Your Information > Preferred Language
The customer can select a language they prefer to read, speak, and language to complete this application from the drop lists.

Click the **please contact your county office** hyperlink if you need an interpreter.

Click the **NEXT** button.

Your Information > Your Name
The customer completes the following fields: **First Name**, **Last Name**, and any other fields that may apply. First and Last Name are required, the other fields are optional.

Click the **NEXT** button.
Your Information > Disability Information
If the customer is disabled or deaf or hard of hearing they will click the Yes or No button that best applies for both questions.

Click the NEXT button.

Your Information > Homelessness
A brief description explains what homelessness to the customer is allowing the customer to click the Yes or No button that best describes their situation.

Click the NEXT button.
Your Information > Current Address

The customer will need to complete the following required fields: Address, City, County, and Zip Code.

Click the NEXT button.

Your Information > Address Verification

The address is matched against the post office and allows the address to remain as entered or to update by clicking the radio button next to the address to be used.

Click the USE SELECTED ADDRESS button.

If the address is not validated, a message displays giving the customer a chance to use the entered address or update the address by clicking the correct my address hyperlink.
Your Information > Mailing Address

Customer clicks the Yes or No button that best answers the question.

Selecting the Yes button opens a new section on the screen to complete the mailing address.

Click the NEXT button.

Select Programs to Apply

Each program card displays information about the program.

Additional information is available for each program in the Help Center.

Click the check box next to the program(s) for which the customer is applying.

Not sure what to choose? To access additional information about each program, click the Help Center hyperlink. More information in the help center about each program available to help select available programs.

Click the NEXT button.
Your Information > Authorized Representative

Customers are asked if they would like an authorized representative to help with their application. Click the Yes or No button.

An explanation displays on what the authorized representative can do to help the customer.

Click the NEXT button.

Your Information > EBT Purchasing

Customers are asked if they would like someone to be able to use their EBT card to purchase food for them. Click the Yes or No button.

An explanation displays what an individual can do with the EBT card for the customer.

Click the NEXT button.
Your Information > Authorized Representative Health

Customers are asked if they would like an authorized representative to help with their health coverage application. Click the Yes or No button.

An explanation displays on what the authorized representative can do to help the customer.

Click the NEXT button.

Your Information > Covered California

Customers are asked if they have applied for insurance through Covered California. Click the Yes or No button.

If Yes, is selected a new field for the Covered California case number. Information displays to help the customer find their case number in Covered California.

Click the NEXT button.
Your Information > Contact Information

Complete the following fields: Home Phone, Mobile Phone, Work Phone/Alternate Phone, and Email.

Click the NEXT button.

Your Information > Email Consent

Click the caret next to Does this sign me up for Emails? to see more information.

This does not sign the customer up for Emails. The customer will still receive items in the mail.

To receive Emails the customer will need to have a BenefitsCal account and opt into Electronic notices in account settings.

Click the NEXT button.
Your Information > Date of Birth (DOB)
Customer enters their Date of Birth using the calendar icon or directly entering in MM/DD/YYYY format.

Click the eye icon in the field to see the entered information.

Click the NEXT button.

Sex (Male/Female – Optional to apply, required to receive benefits)
Click the caret to see why the question about your sex is being asked.

Click the radio button next to the one that applies to the customer.

Click the NEXT button.
**Gender Identity (Optional)**

Click the caret to see why the gender identity question is being asked.

Click the radio button next to the one that applies to the customer.

Click the **NEXT** button.

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**Sexual Orientation (Optional)**

Click the caret to see why the sexual orientation question is being asked.

Click the radio button next to the one that applies to the customer.

Click the **NEXT** button.
Your Information > Social Security Number (SSN)
Select the radio button next to the appropriate answer.

Selecting Yes opens a new screen asking for the SSN.

Selecting No opens a new screen asking for the reason for not having an SSN.

Clicking the caret for Why do you need a Social Security number displays the customer information on getting an SSN and who will need one.

Click the NEXT button.

Your Information > Marital Status
The customer will need to select the radio button next to the one that applies.

Click the NEXT button.
Your Information > Citizen or National

Selecting the **Yes** button goes to the next screen.

Selecting the **No** button opens new sections on the screen for the customer to complete and based on answers may open new screens to complete.

Complete the date entered the U.S. using the calendar icon or directly entering in **MM/DD/YYYY** format.

Answer **Yes** or **No** for eligible immigration status. Complete the remaining fields based on prior answers.

Click the **NEXT** button.

Hispanic, Latino, or Spanish Origin

Select the radio button next to the appropriate answer.

Selecting **Yes** will open a new section/screen asking for more information about origin in a drop list.

Clicking the caret for Why are we asking? displays to the customer information on the collection for the civil rights statistics.

Click the **NEXT** button.
Summary – Next Step

Clicking the **Skip and submit now** hyperlink takes the customer to the expedite food assistance page when CalFresh and Immediate Need for CalWORKs are selected.

Clicking the **CONTINUE APPLICATION** button is highly recommended to continue completing the application.

Click the **Skip and submit now** hyperlink.

Application Summary

The Your Information section is now showing **UPDATE** allows the customer to go back and make changes if needed.

The People section is now unlocked and ready to be started.

The Household Details is showing locked as the customer must complete the People section for the Household Details to unlock.

The Document Upload is now unlocked and ready to be started. The customer may upload documents at this time, or they can submit.

Clicking the **BEGIN NEXT SECTION** will start the People section of the application.

Click the Start button for **Review and Submit**.

Let’s review a quick summary of your details page. Next button
Review and Submit

This allows the customer to review their application, the programs selected and individual information. The **UPDATE** button allows the customer to change information prior to submitting the application.

Click the **NEXT** button.

Expeditied Services Criteria

Questions are to determine if expedited food assistance is needed. Online help explains the income and expenses that may make it possible for expedited food assistance.

Based on the answers, a new screen may open letting the customer know they may qualify for expedited food assistance.

Click the **NEXT** button.
Immediate Need Criteria

Questions are to determine if an immediate need exists in the home.

The customer can select one or more checkboxes.

Based on the answers, a new screen may open letting the customer know they may qualify for Immediate Need for CalWORKs.

Click the NEXT button.

Review & Submit

CalFresh applications allow the customer an option of in-person or phone interviews.

If special arrangements are need the customer can select Yes and a new screen opens to details about the disability.

Click the NEXT button.
Review & Submit

Your almost done! Let’s the customer know the signature page is coming up and who will need to sign the application.

Click the **NEXT** button.
E-Signature

Select the **Review my report** hyperlink to review a copy of the application.

Customers are responsible for reading the “Rights and Responsibilities and Program Rules and Penalties.”

Enter the **First Name**, **Last Name**, and today’s **Date (MM/DD/YYYY)**.

Click the checkbox to electronically sign the application.

Click the **SUBMIT SIGNATURE** button.
**E-Signature: Spouse or Partner**

The second e-signature displays if the customer applied for CalWORKs and another adult is in the home beyond the primary applicant.

Enter the **First Name, Last Name, and today’s Date (MM/DD/YYYY)**.

Click the checkbox to electronically sign the application.

Click the **SUBMIT SIGNATURE** button.

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**Office Selection**

Customers can select an office to process their application if, for example, they prefer to select an office closer to their work location than their home location.

Customers do not need to modify their office: this is an optional feature.

Select the radio button for office choice. The nearest office will display first.

Click the **NEXT** button.
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Submit Application

Customers can use the back button to make any changes before submitting.

Click the **SUBMIT APPLICATION** button.

Confirmation

Click the **Save a copy of your application** hyperlink to save a copy.

Select the **track your application status** hyperlink to navigate to the Customer Dashboard to view the application status. If the customer did not create an account, selecting the hyperlink will instead display the Create an Account screen.

A Confirmation receipt is available includes the following:

- Date Time
- Case Number
- Form Type

The customer can click a save receipt method to text, Email, or print a receipt of the application.

Click the **BACK TO HOMEPAGE** button to return to the Customer Dashboard.