BenefitsCal | Quick Guide: Request an Appointment

Purpose

The purpose of this BenefitsCal Quick Guide is to provide instructions to assist customers with requesting an appointment.

Customers may cancel an appointment or request to reschedule their appointment in the future.

High-Level Process Flows

```
        ◇ Dashboard ◇
             │
       Appointments
             │
   Request an Appointment
             │
      Request Received
             │
          History
             │
    Appointment Details
             │
        Reschedule
             │
          Receipt
```

FAQs

Q: Can customers have more than one appointment?
A: Yes, customers can have more than one appointment based on the programs in the case.

Q: Is it possible for the customer to schedule an appointment?
A: No, the customer is only able to request an appointment. The request comes in the form of a task.

Q: Can customers request a specific date and time?
A: No, the customer is only able to request multiple days of the week and time preference am or pm. The County will determine the date and time based on the workers availability.

Q: My County does not use the CalSAWs appointment feature. Will customers be able to see our appointments in BenefitsCal?
A: No, the customer is only able to view appointments scheduled within CalSAWs.
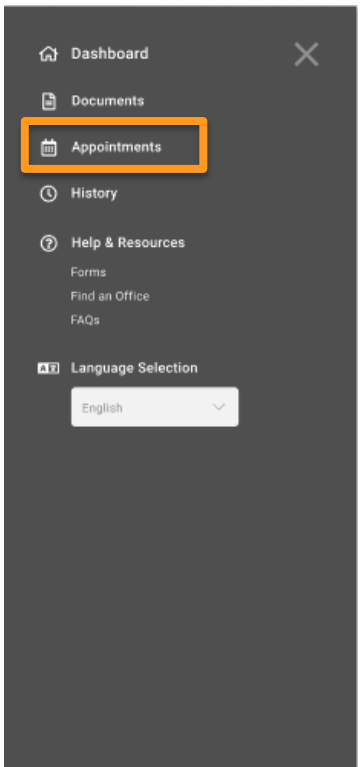
Request an Appointment:

1
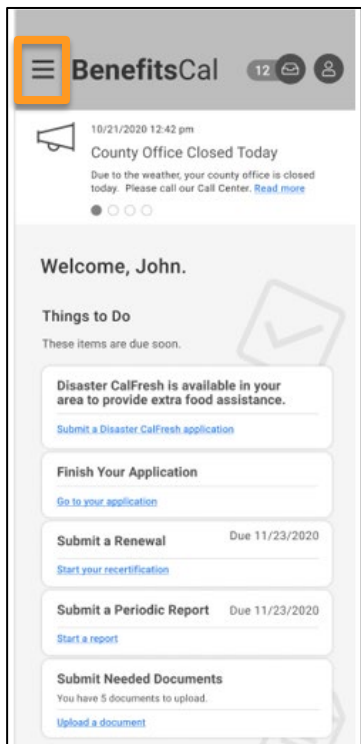
Customer Dashboard

To view Appointments, Customers should login to BenefitsCal.

On the Dashboard, click the menu ☰ icon in the top left.

2

Customer Menu

From the menu, click Appointments. This will take us the Appointments screen. Go to step 4.

3

Dashboard > Appointments

Upcoming appointments will display under the Your Next Appointment section. Click the hyperlink to see details about upcoming appointments.

Click the **VIEW APPOINTMENTS** button.

4

Appointments

The Appointment screen displays upcoming customer appointments on a calendar and in a list.

If there are no upcoming appointments, a message will display "You do not have any appointments at this time."

Click the **REQUEST AN APPOINTMENT** button.

5

Let's request an appointment.

Select your case.

Case Number (required)

- Select One -

Select your appointment type.

Appointment Type (required)

- Select One -

Select your preferred day(s) of the week.

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

Select your preferred time of day.

☐ Morning (8 am - 12 pm)

☐ Afternoon (1 pm - 5 pm)

SUBMIT REQUEST

Requesting an Appointment

To request an appointment, select the **Case Number** from the drop list.

Select the appointment type from the drop list.

Click the checkbox next to the **preferred day(s)**of the week.

Click the checkbox next to the **preferred time** of day.

Click the **SUBMIT REQUEST** button.

💡 Reselect the checkbox to remove the check mark.

💡 **CalSAWs** – On the Task page a task will be created displaying the customer is requesting an appointment. The task will include customers preferred day(s)and timeframes (morning or afternoon.)

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☰ BenefitsCal   12 ✉ 👤

✓

We received your request.

Appointment Type   Counselor Meeting

Preferred Day(s)   Monday
                    Wednesday

Preferred Time   Morning
                  (8 am - 12 pm)

Note: A caseworker will follow up with you about your request.

Text, email, or print a copy of your receipt.

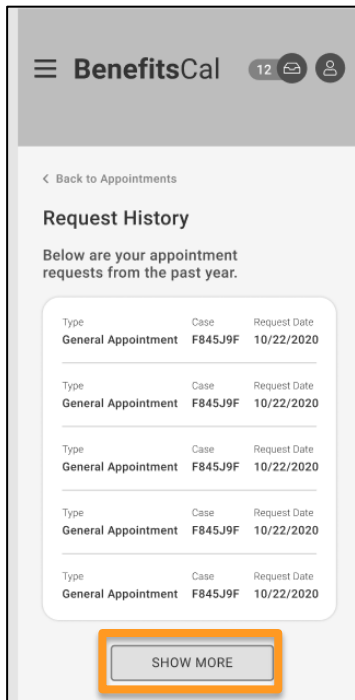📱 ✉ 🖨

BACK TO APPOINTMENTS

Request Received

An appointment request receipt is generated for the customer.
- ✓ Appointment Type
- ✓ Preferred Day(s)
- ✓ Preferred Time

Select an icon to save the receipt of the appointment request – text, email, or printed copy.

Click the **BACK TO APPOINTMENTS** button or select the Menu ☰ to return to the Dashboard.
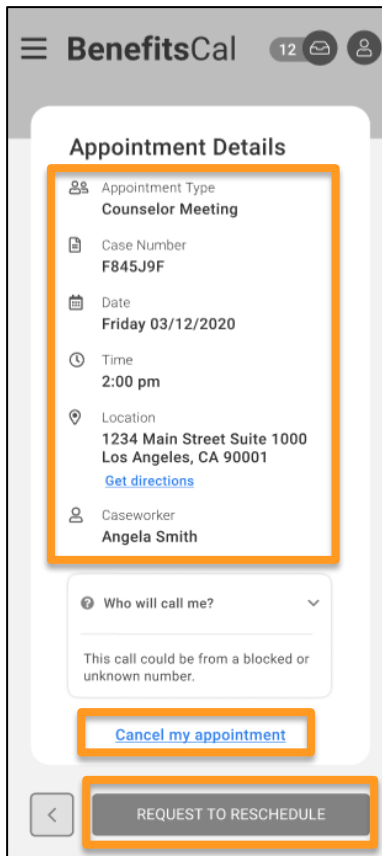
7

Request History

The **History page** is accessed from the **Customer Menu** shown in Step 2. Request History displays a list of requested appointments from the past year.

Click the **SHOW MORE** button to see additonal past appointments.

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Appointment Details

After an Appointment is scheduled within CalSAWs, the Appointment Details will display within BenefitsCal including the following:
- ✓ Appointment Type
- ✓ Case Number
- ✓ Date
- ✓ Time
- ✓ Location
- ✓ Caseworker

To cancel an appointment, click the **Cancel my Appointment** hyperlink and a pop-up will open asking 'Are you sure you want to cancel this appointment?'

To reschedule the appointment, click the **REQUEST TO RESCHEDULE** button.

9

Reschedule Details

To request to reschedule an appointment, click the checkbox next to the preferred day or day(s) of the week for the appointment. Select mornings or afternoons.

Click the **SUBMIT REQUEST** button.

💡 Reselect the checkbox to remove the check mark.

💡 CalSAWs – On the Task page a task will be created displaying the customer is requesting to reschedule appointment. The task will include customers preferred day(s) and timeframes (morning or afternoon).

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Reschedule Confirmation

A receipt is generated for the customer's request to reschedule the appointment including the following:
- ✓ Appointment Type
- ✓ Preferred Day(s)
- ✓ Preferred Time

Select an icon to save a copy the receipt of the appointment reschedule request – text, email, or printed copy.

Click the **BACK TO APPOINTMENTS** button.