

BenefitsCal | Quick Guide: Community Based Organization Access Request

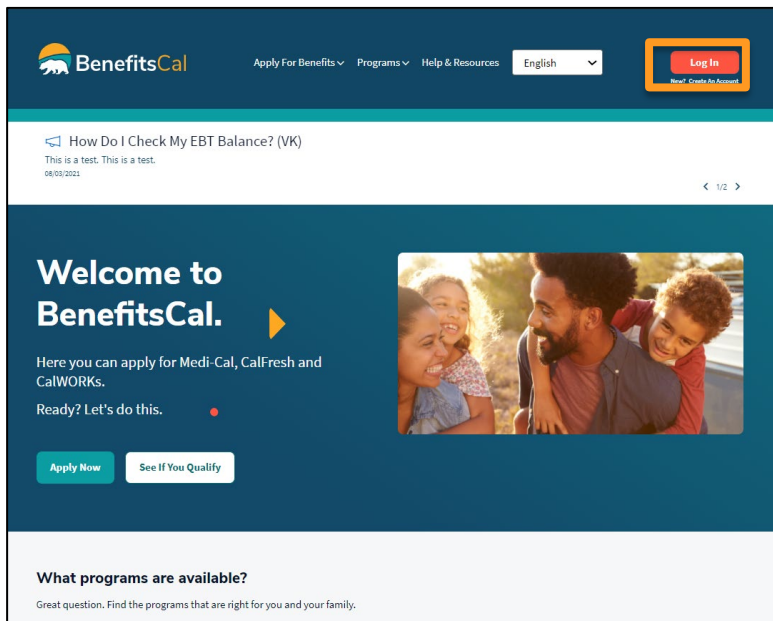
Purpose

The purpose of the BenefitsCal Quick Guide is to provide instructions to assist County designated personnel, who may be the existing County Help Desk Administrators create new Community-Based Organization (CBO) accounts in the Delegated Admin Portal. The guide will walk through the process from:

1. The new CBO organization submitting a request through BenefitsCal (CBO takes Steps 1-4)
2. County to review task in CalSAWS (County Designated Portal Staff takes Steps 5-8)
3. How to create the CBO Organization and CBO Manger(s) using the Delegated Administrative Portal (County Designated Portal Staff takes Steps 9-25)
4. The new CBO organization must complete process by validating the email received and selecting a password. (CBO takes Step 26)
5. To add CBO Assisters under the CBO Manger, please reference Community Based Organizations Dashboard Reference Guide on the BenefitsCal Site or LMS.

CBO Request Account:

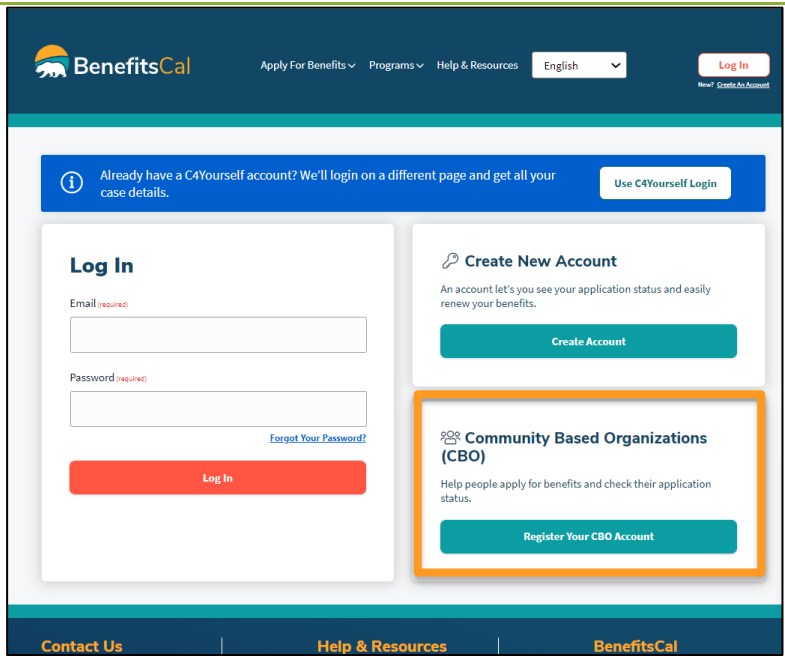
1



BenefitsCal Home Page

Click the **Log In** button.

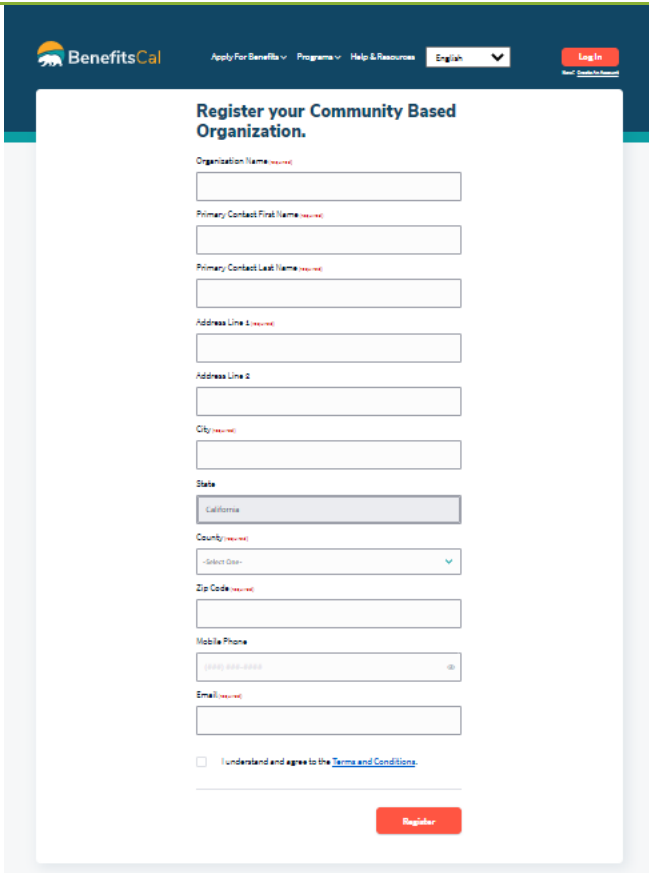
2



Community Based Organization (CBO)

Click the **Register Your CBO Account** button.

3



Register Your CBO Account

CBO Completes all required fields to request account.

Mark the check box for **Terms and Conditions**.

Click the **Register** button.



4

BenefitsCal Apply For Benefits Programs Help & Resources English Log In

Your request is on its way to the county!

What happens next?

- 1 We'll review your request.
- 2 You'll receive an email from BenefitsCal letting you know your account has been created. This may take a few days, but we're on it.

Make sure to check your spam folder if you haven't received it in a couple of days.

BACK TO HOME

Contact Us
Need support from your county office? Find an Office
Technical issues using this website? Contact the IT team
We want to hear from you! Have any comments about the site? Share your feedback

Help & Resources
Frequently Asked Questions Programs Register to Site

BenefitsCal
BenefitsCal is a portal where Californians can get and manage benefits online. This includes food assistance (CalFresh), formerly food stamps, cash aid (CalWORKS), General Assistance, Cash Assistance Program for Immigrants, and affordable health insurance (Medi-Cal).
Sponsored by CalSWS, the Department of Social Services (DSS) and the Department of Health Care Services (DHCS).
State of California Official Website

Request is on its way

Account request has been sent to CalSAWS for county review.

5

CalSAWS Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles UAT2 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Tasks

Case Number: Go

Worklist Summary

Worker ID: * 19DPL1Q4L8 Select Priority: All Display By: Task Age Search

Search Results Summary Results 1 - 1 of 1

Task Type / Sub-Type	Priority	0-10 Days	11-30 Days	31-60 Days	Over 60 Days
Request to create a CBO account	Medium	17	11	0	0

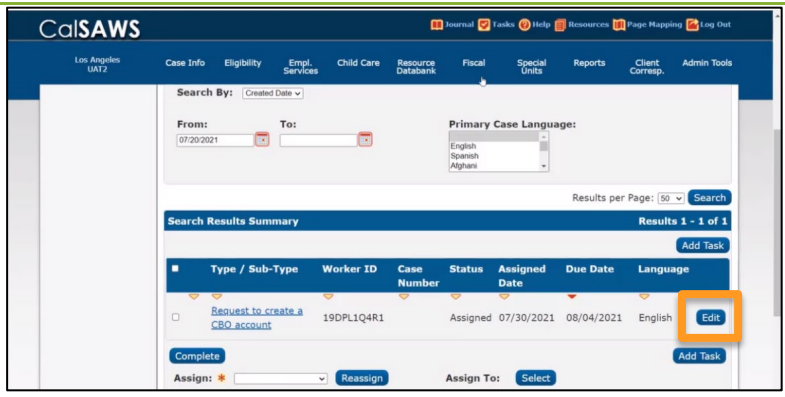
This page took 0.45 seconds to load.

CalSAWS > Worklist Summary

County designated personnel receive a task in CalSAWS from each CBO who requested to create a CBO account.

Click the hyperlink to view all outstanding CBO requests.

6

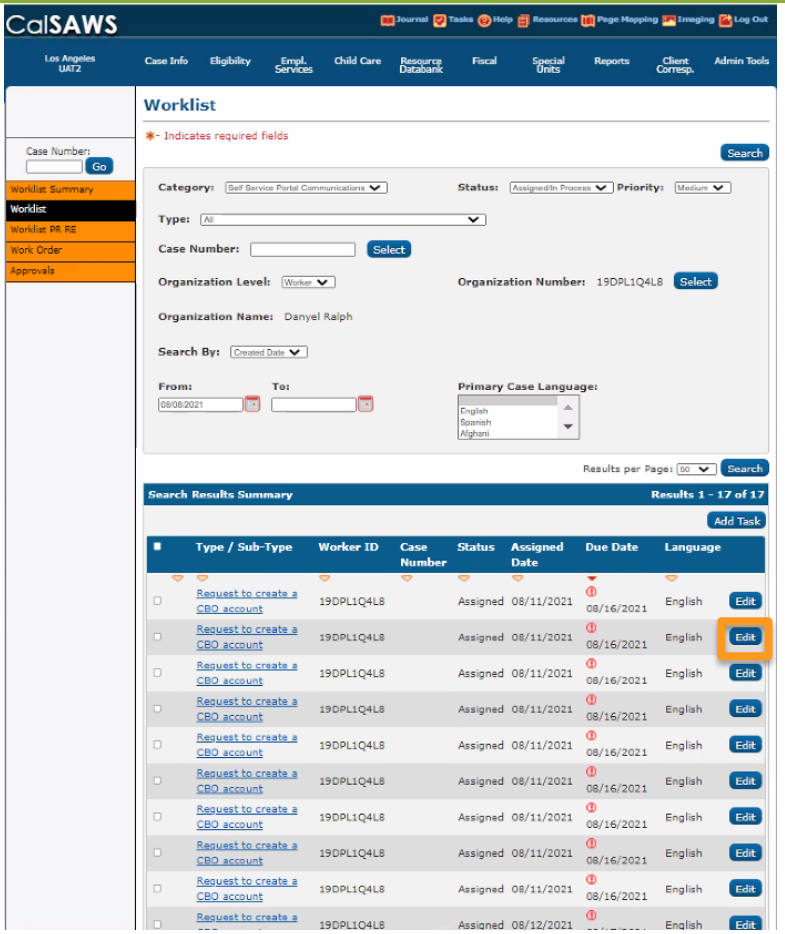


CalSAWS > Task

County designated personnel receive a Request to create a new CBO account task.

Click the **Edit** button to open task.

7



CalSAWS > Worklist

The County designated personnel will need to follow county process to review request.

Click the **Edit** button to open.

8

CalSAWS > Task Detail

Refer to the Long Description in CalSAWS to complete the request in the Delegated Admin Portal.

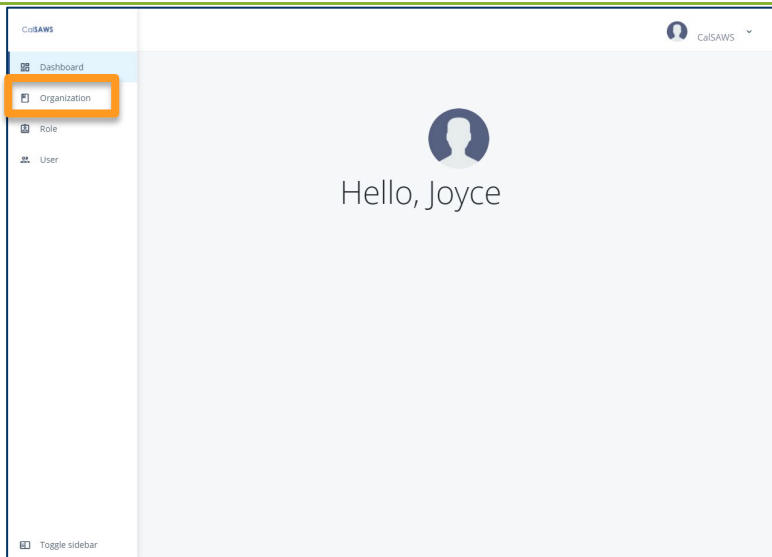
9

Delegated Admin Portal

County designated personnel logs in to the Delegated Admin Portal.

Refer to **CIT #0233** to see who has access to create/approve accounts in the Delegated Administration Portal.

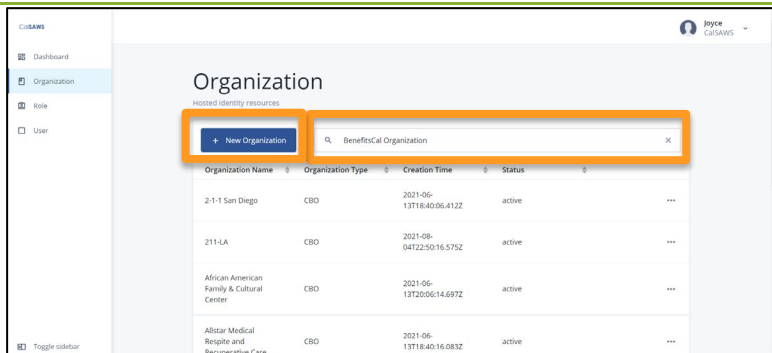
10



Delegated Admin Portal > Organization

Click **Organization** on the left side navigation.

11



Delegated Admin Portal > Organization

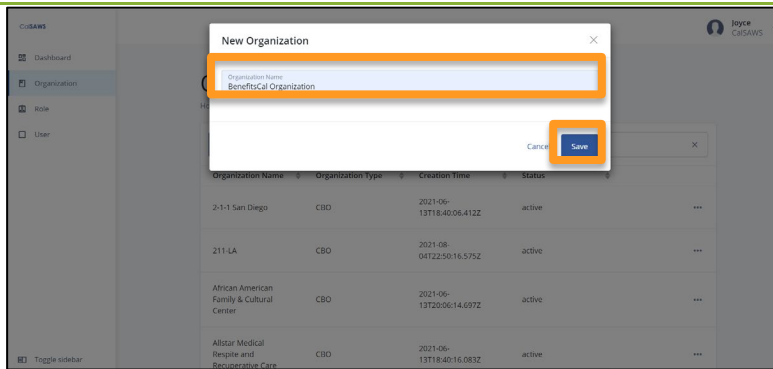
First, search to see if the Community Based Organization currently exists. Note: Ensure your search is by long name and by CBO acronym, if appropriate, to avoid potentially creating any duplicate CBO accounts.

To search enter the organization name in the **Search** field and click **Enter**.

If organization is found, skip to Step 15 to add a new manager.

If no results found, click the **+New Organization** button and go to step 12.

12

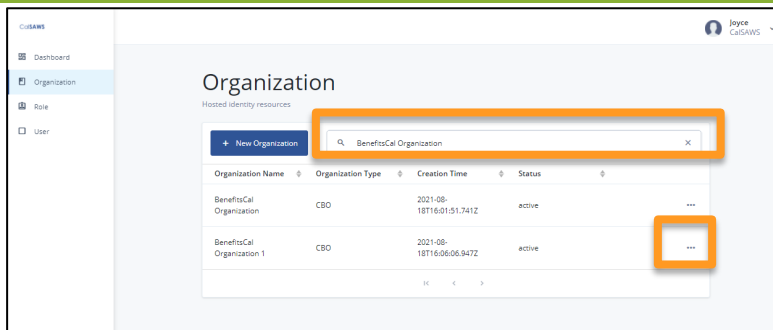


Delegated Admin Portal > Organization

Add a new CBO Organization to the database by entering the full name of entity or their acknowledged acronym. (Example: California State University, Chico or CSUC) CBO name in the field.

Click the **Save** button. The new Organization is now created.

13



Delegated Admin Portal > Organization

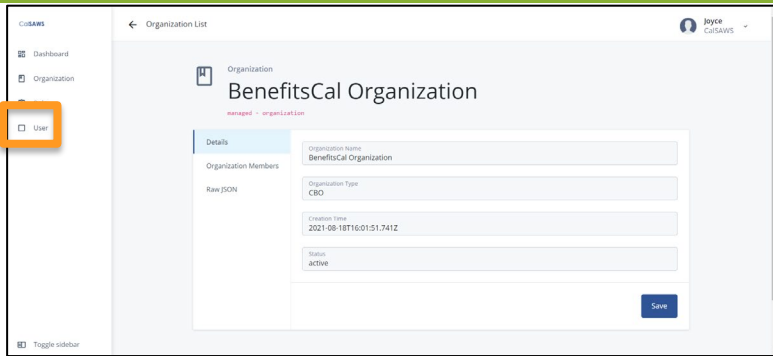
Search the newly created organization by entering the name in the search field and click **Enter** on keyboard.

The new Organization displays the organization type, creation time, and status.

To edit information, click the **ellipsis** (...) on the right side.

If another CBO Organization needs to be searched or added, repeat steps 10 – 13, otherwise go to Step 14.

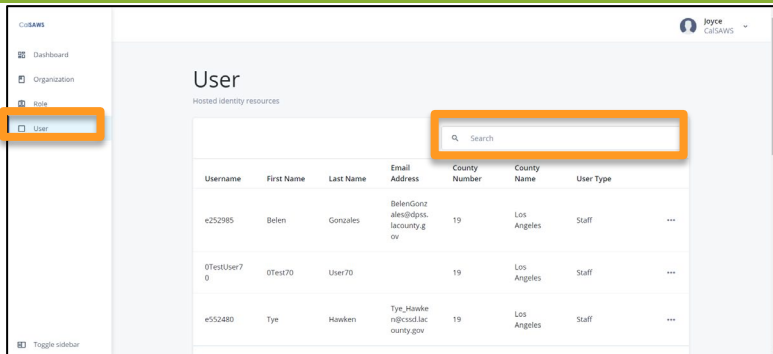
14



Delegated Admin Portal > User

Add a new CBO manager by clicking on **User** on the left side navigation.

15



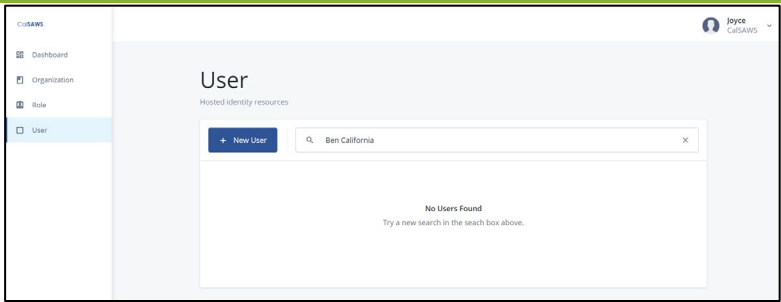
Delegated Admin Portal > User

First, search to see if the user already exists.

To search enter the user's name in the **Search** field and press **Enter**.

If results are found, please go to step 18 to add new provision. Otherwise, go to Step 16.

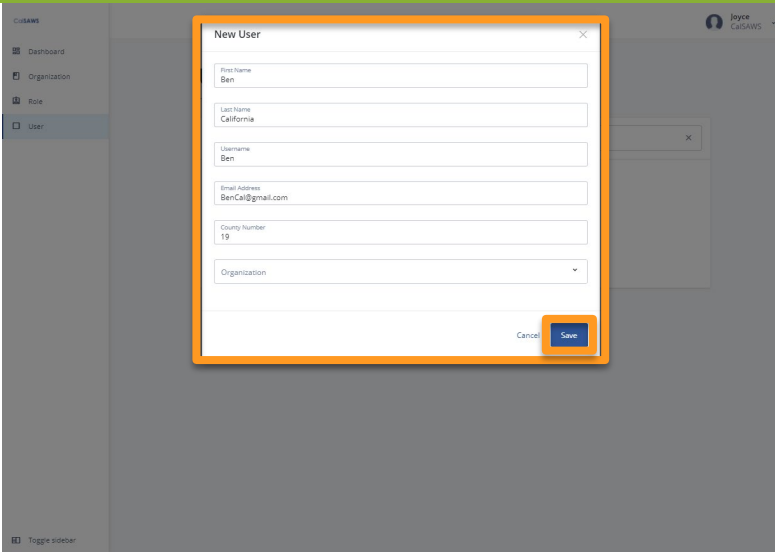
16



Delegated Admin Portal > User

To add a new user, click the **+New User** button.

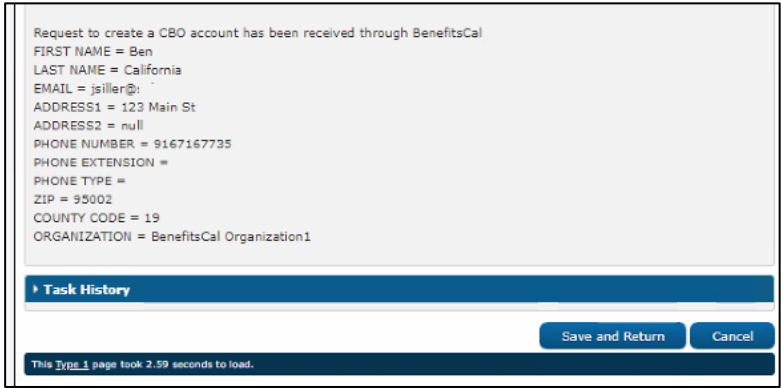
17



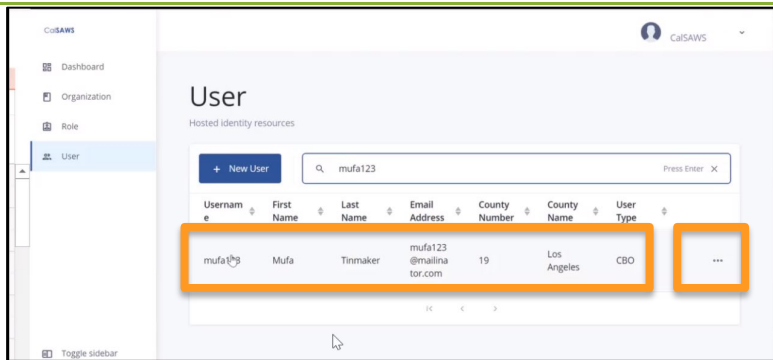
Delegated Admin Portal > User

Complete New User information using the task information in CalSAWS.

Click the **Save** button.



18



Delegated Admin Portal > User

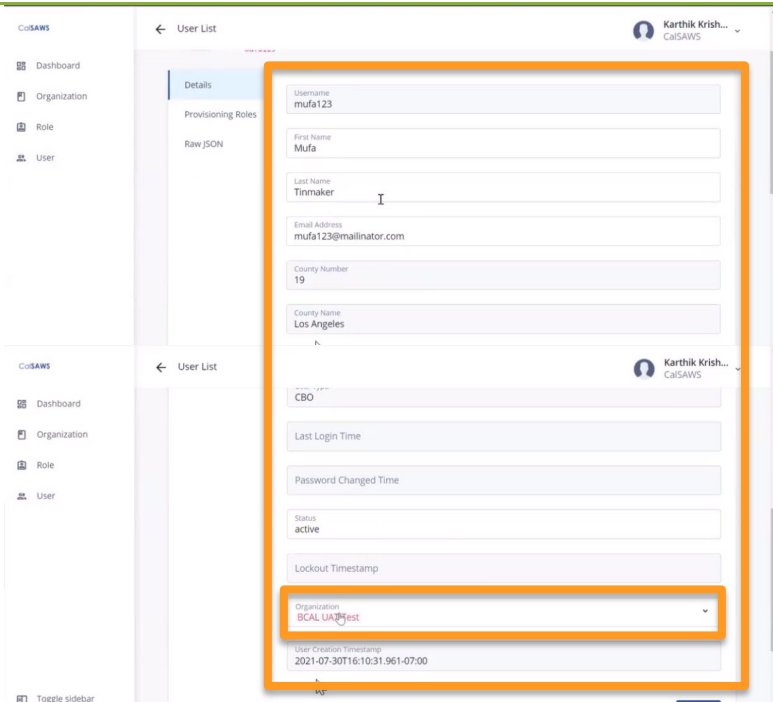
Search for newly created user by entering the user's name in the search field and click **Enter**.

The newly created user information displays: Username, First Name, Last Name, Email address, County Number, County Name, and User Type.

Click on the new user's row to view details as shown in Step 19.

To edit information, click the **ellipsis** on the right side.

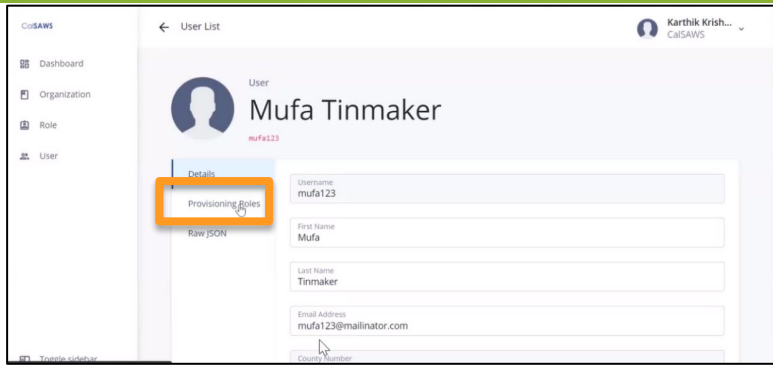
19



Delegated Admin Portal > User Details

Verify all information has been completed and that the correct organization is listed.

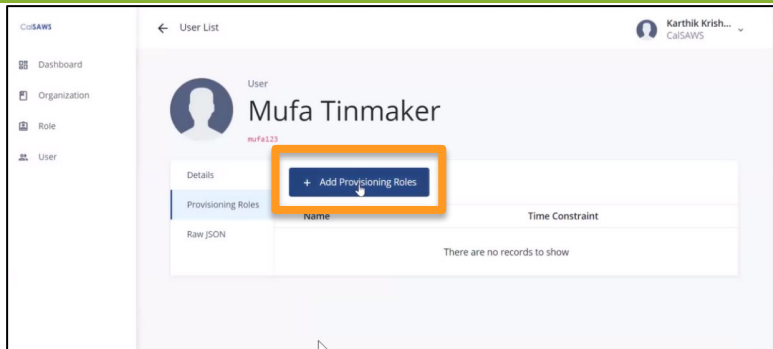
20



Delegated Admin Portal > User > Provisioning Roles

Click **Provisioning Roles**.

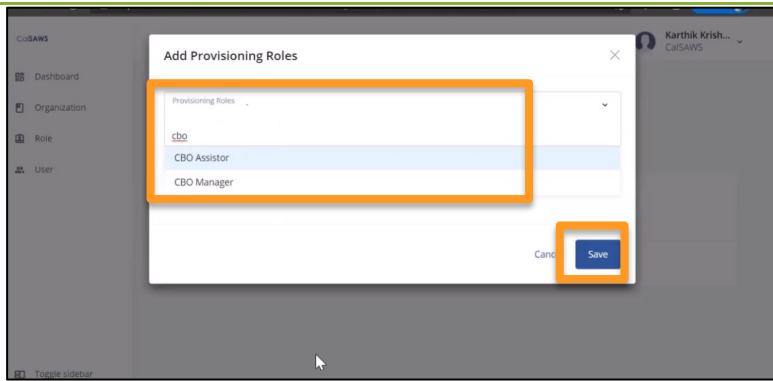
21



Delegated Admin Portal > User > Provisioning Roles

Click **+Add Provisioning Roles** button to add.

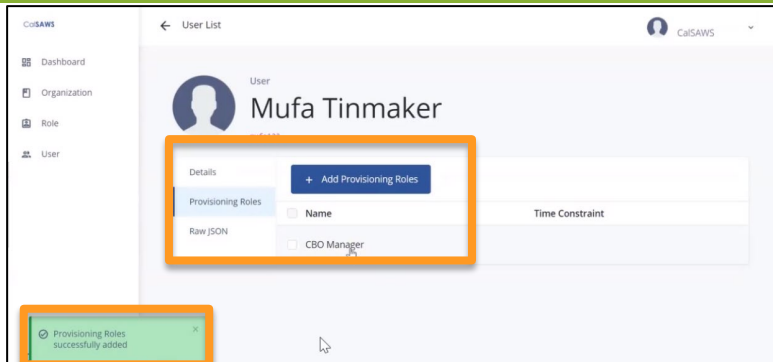
22



Delegated Admin Portal > User > Provisioning Roles

Enter **CBO** in the search field and press **Enter**. Click **CBO Manger** and click **Save**

23



Delegated Admin Portal > User

This individual is now provisioned as a CBO Manganer.

A message will appear 'Provisioning Roles successfully added'.

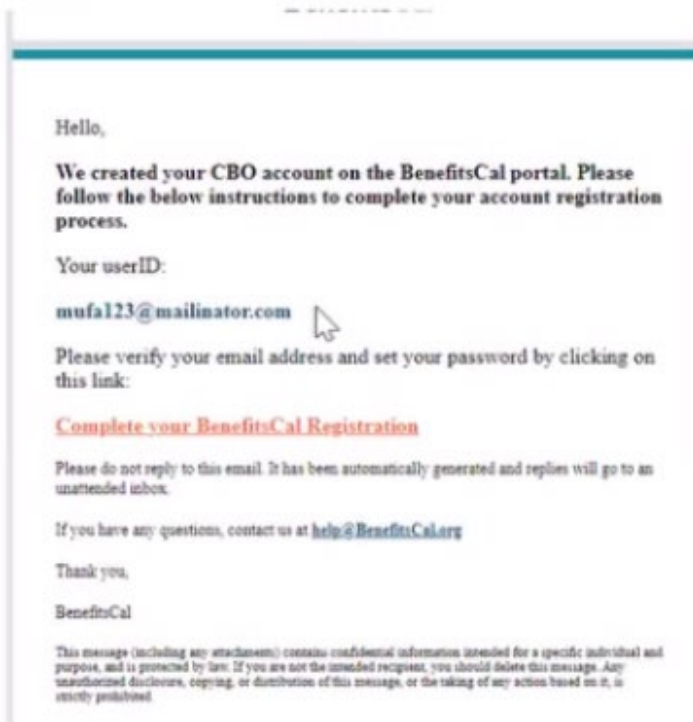
CalSAWS > Task Detail

To complete the process in CalSAWS by indicating the task is complete: Return to the CalSAWS Task Detail Page and check the box next to 'Mark Task as Complete' at the bottom right of the screen and click the **Save and Return** button.

CalSAWS > Worklist

Validate the Status is **Completed**.

Type / Sub-Type	Worker ID	Case Number	Status	Assigned Date	Due Date	Language
Request to create a CBO account	90LS00CS00		Completed	08/18/2021	08/23/2021	English



CBO Email

This image is the email sent to the designated CBO Manager to inform the CBO Manager that a BenefitsCal account has been created and to follow the instruction to verify the email address and set the password.

The CBO Manager is to click the link provided in the email and enter the user ID (email address) and will receive a prompt to create a password.

The following Quick Guides are available in the Learning Management System (LMS):

- BenefitsCal Reset Password Quick Guide
- BenefitsCal Two-Step Verification Quick Guide
- BenefitsCal Community Based Organization Dashboard Quick Guide