

BenefitsCal | Quick Guide: Customer Dashboard

Purpose

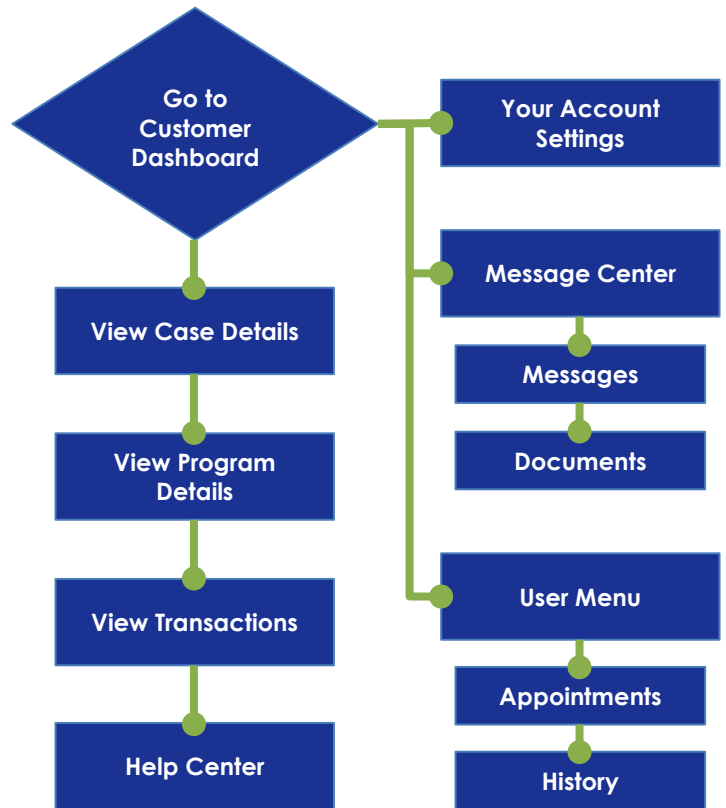
The purpose of this BenefitsCal Quick Guide is to provide instructions to assist customers in locating items on the customer dashboard.

The customer dashboard is designed to highlight any actions needed right at the top, in Things To Do (for example: uploading documents needed).

In BenefitsCal, customers can perform the following actions in their Dashboard:

- ✓ review their case information
- ✓ view EBT balances
- ✓ view appointments
- ✓ manage their benefits

High-Level Process Flow



FAQs

Q: Why don't I see my application or case on my Dashboard?

A: The customer account needs to be linked to the application or case to display data. Please refer to Quick Guide "Link to Case" for instructions on how to guide the customer to link their application or case. Please refer to CalSAWs Quick Guide– BenefitsCal Integration for instructions within CalSAWs to link the account to the case.

Q: Can a customer see how much they spent at a store?

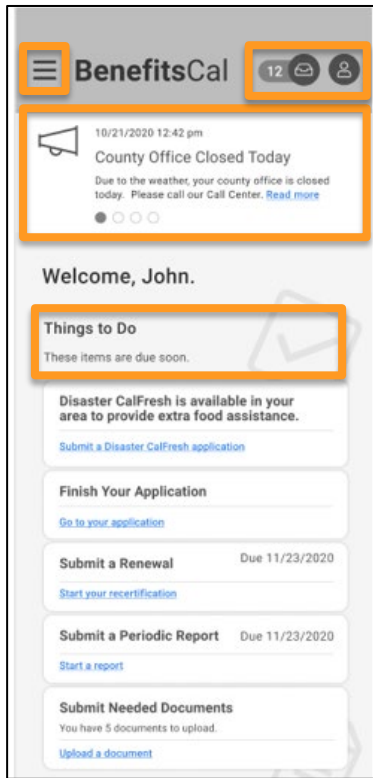
A: Yes, customers can search by date, location, and amount in transactions.

Q: Customer can't remember if they reported a change in household, is there a place to see what was reported?

A: Yes. In the Menu, select History and then select Change Reports. Here, users will see all the changes reported through BenefitsCal.




Customer Dashboard

1



Customer Dashboard

The BenefitsCal dashboard displays three icons at the top of the screen.

-  (Menu) – opens the User menu
-  (Inbox) – opens the Message center
-  (User profile) – opens the Account settings

At the top of the screen, announcements will display - the office closing is just an example.

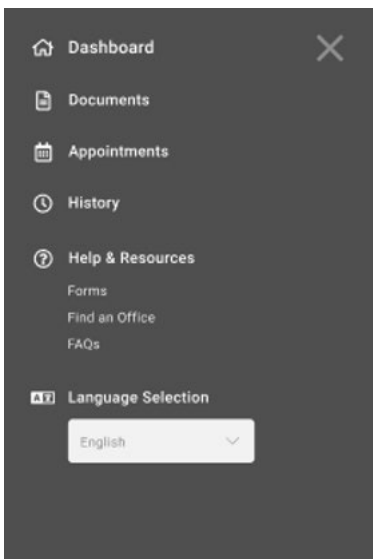
Things to Do list displays items needing customer attention. These items display things like

- ✓ Finish your application
- ✓ Submit a Renewal
- ✓ Submit a Periodic Report
- ✓ Submit Needed Documents



Disaster CalFresh only displays when its available in the customer's area.


2



Dashboard > User Menu

The customer can find several resources.

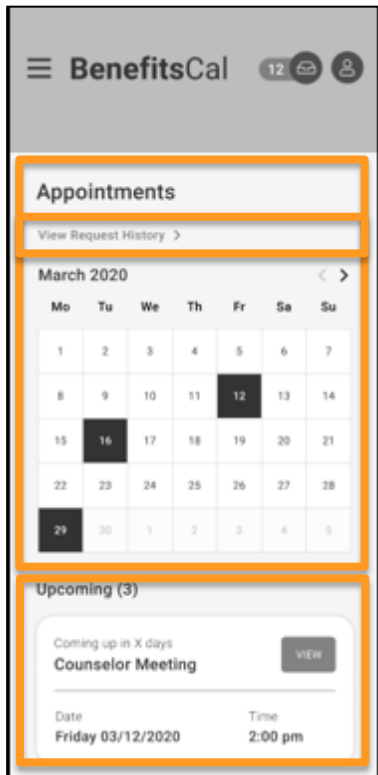
The User menu can be accessed at the top of each screen.

Click the  (menu) icon to open the User menu.

Under the Help & Resources section, the customer can find blank forms (Periodic Reports), find an office near their location, and view FAQs.

The system will display the language selected.

3



Dashboard > User Menu > Appointments

From the dashboard, select Appointments to view upcoming appointments (today or in the future).

Select the View Request History hyperlink to view the history of appointments and requests.

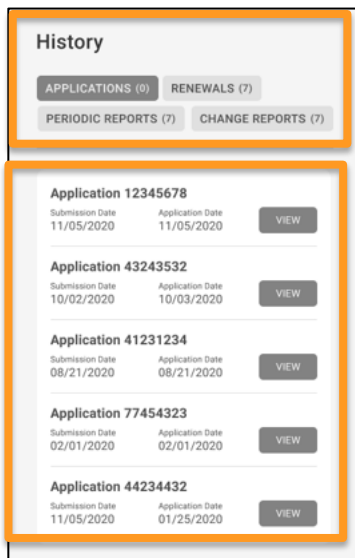
A calendar view highlights the days with scheduled appointments.

Upcoming appointments display:

- ✓ Number of days before the upcoming appointment
- ✓ Type of appointment
- ✓ Date
- ✓ Time

For more information about an appointment, click the **VIEW** button.

4



History

The customer can see their applications, renewal, periodic reports, and change reports history.

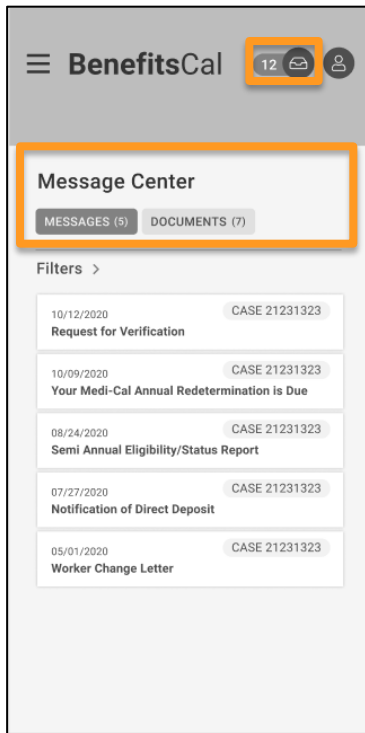
Choose what history to view by clicking the button.

The example shows applications, and displays:

- ✓ Application Number
- ✓ Submission Date
- ✓ Application Date


Click the VIEW button to see more details.

5



Message Center > Messages

Access the Message Center by selecting the Inbox icon at the top of each screen.

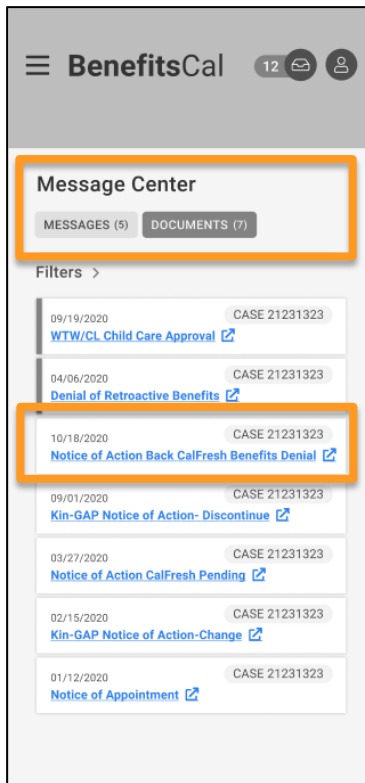
Click the  (Inbox) icon to open the Message Center, to view messages and documents (correspondence) from County.

To view a message, click the **MESSAGE** button. Messages display the following:

- ✓ Date
- ✓ Case number
- ✓ Message link

Select any message file to view the full message.

6



Message Center > Documents

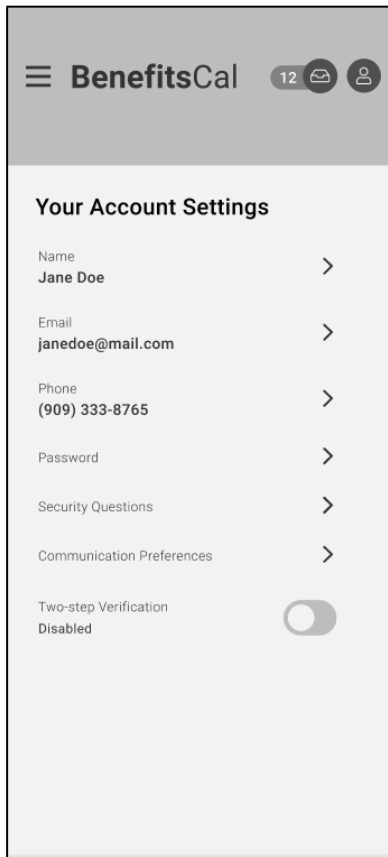
In the Message Center, the system displays documents for the case.

Clicking the **DOCUMENTS** button opens the document screen displaying the following information:


- ✓ Date
- ✓ Case number
- ✓ Document link

To view the document, click the document file.

7



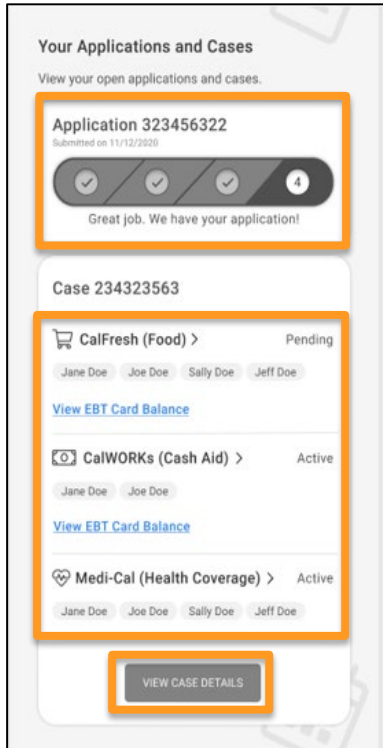
Dashboard > User Profile > Your Account Settings

Click on the  User Profile icon. Your Account Settings opens to allow customers to make changes to their profile by clicking the item.

Review the QRG “Opt into Electronic Notices” for more information on updating communication preferences.

Review the QRG “Two-Step Verification” for instructions for setting up two-step verification.

8



Applications and Cases

The Your Applications and Cases section includes a high-level view of application and case information, including all programs associated with the case, and the status of each program and household member.

The **application status** will display for applications in progress.

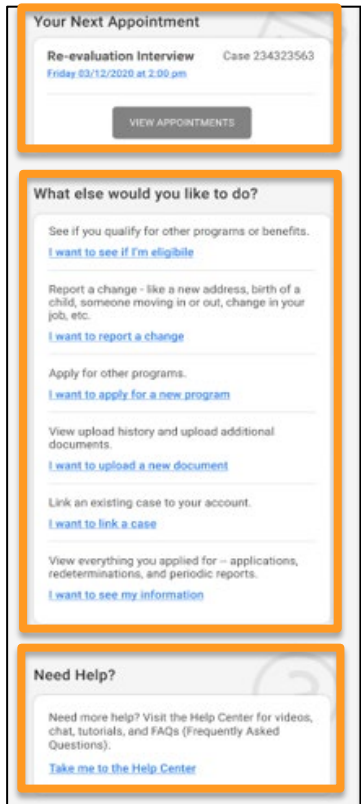
- If there are no active applications, this section will not display.

The **View EBT Card Balance** hyperlink will navigate to the balance of benefits for the month and the total monthly amount of benefits.

- If there is no EBT benefit, this section will not display.

Click the **VIEW CASE DETAILS** button for details about each program the customer is receiving. Step 4 displays case detail information.

9



Appointments and Actions

The Appointment section displays any upcoming scheduled appointments. Customers can see the type of appointment, date, and time. Step 8 displays appointments.

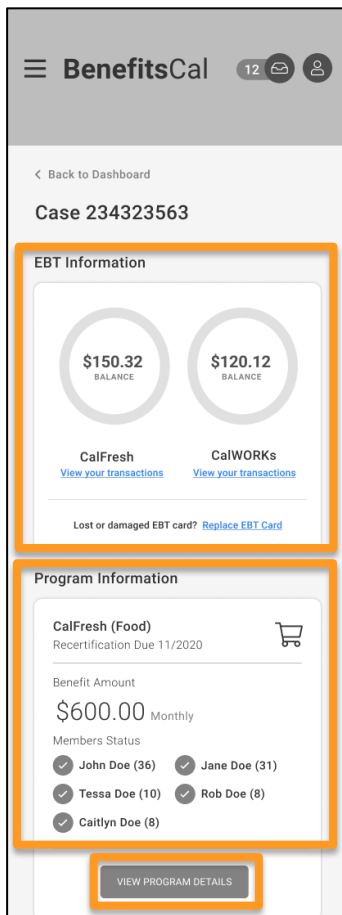
If there are no upcoming appointments, the section will display a button to **REQUEST AN APPOINTMENT**.

What else would you like to do? Gives the customer quick access by clicking the following hyperlinks:

- ✓ I want to see if I'm eligible programs
- ✓ I want to report a change
- ✓ I want to apply for a new program
- ✓ I want to upload a new document
- ✓ I want to link a case
- ✓ I want to see my information

Help is available on each screen at the bottom. Click the **Take me to the Help Center** hyperlink for help content.

10



View Case Details

From the Customer Dashboard, when the customer clicks a **program name** hyperlink (CalFresh, CalWORKs, Medi-Cal) more information about each program displays.

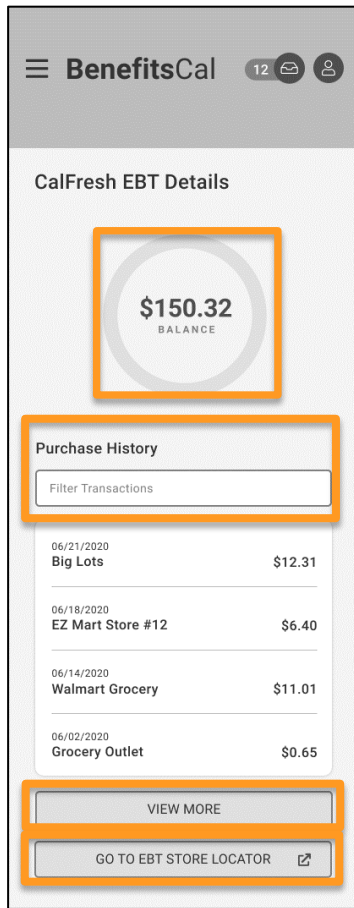
An example for CalFresh:

- ✓ Remaining balance for EBT programs
- ✓ View your transactions hyperlink
- ✓ Replace EBT Card hyperlink

Program Information allows the customer to see the following:

- ✓ Recertification due date
- ✓ Monthly benefit amount
- ✓ Program members and ages

Clicking the **VIEW PROGRAM DETAILS** hyperlink opens a new screen with detailed information.



View EBT Transactions

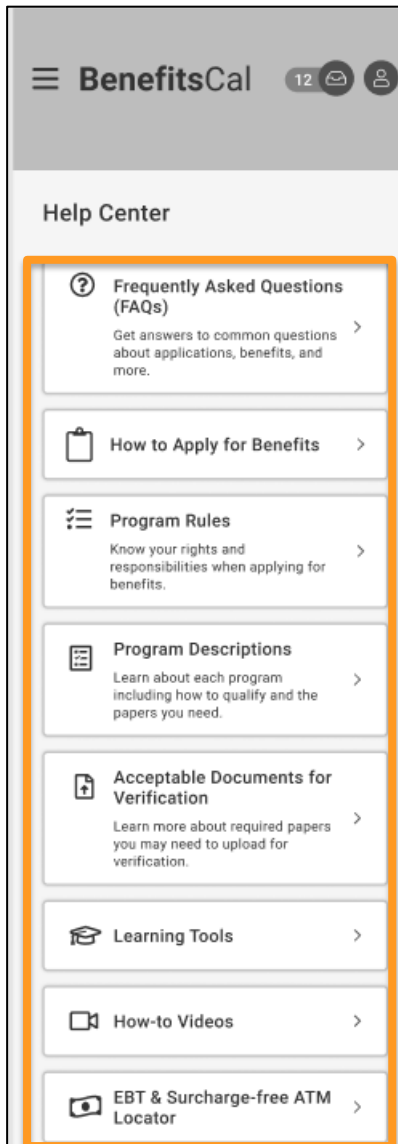
At the top of the screen, the current CalFresh EBT balance displays. The Purchase History section allows filtering, you can search past transactions on the following:

- ✓ Date
- ✓ Location
- ✓ Amount for each transaction

The Filter Transaction History field allows the customer to search for transactions. For example, entering "12" will return all items with a 12 (including both dates and dollar amounts).

The **VIEW MORE** button will extend the purchase history.

Customers can now find stores near them by clicking the **GO TO EBT STORE LOCATOR** button. This takes them out of BenefitsCal.



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 customers.

Select any file to open for detailed information.



Help resources are available to users without an account, without logging in.



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