Purpose: This BenefitsCal Reference Guide contains information on items found on the Assistor and Manger CBO Dashboard.

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This Reference Guide includes the following tasks performed by BenefitsCal CBO assistors and managers within the BenefitsCal system.

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Click the **Login** button to login or request to create a CBO account.
BenefitsCal > Login

Log in to BenefitsCal using your Email and Password.

Need to request access, click the Register Your CBO Account button. Complete form to register your community based organization.
CBO Assister Dashboard

The BenefitsCal assistor dashboard displays four (4) unique areas on the screen.

**User Menu** – can be accessed at the top of each screen.

**Applications** – allows the user to start a new application and see how many applications are in the progress, submitted, received, and processed.

**My Reports** – displays applications submitted this week and applications approved this month.

**Help & Resources** – provides access to program details and allows the user to contact the County.
CBO > Dashboard > User Menu

The customer can find several resources on the User Menu.

**BenefitsCal logo** – returns the user back to the dashboard from any page.

**Applications** – provides access to create a new application or view current applications.

**Reports** – provides access to reports for each status.

**Help & Resources** – provides access to blank forms (Periodic Reports), find an office near their location, and view FAQs.

**Language** – displays the language selected from the drop list.

**User Initials** – provides access to Account Settings, Help and Resources and log out.
Dashboard > Manage Your Account

Click on the icon. Your Account Settings opens to allow customers to make changes to password, update security questions, and enable/disable two-step verification.

Below Help & Resources in the drop list is the Log Out button.

Review the QG “Two-Step Verification” for instructions for setting up two-step verification.
CBO > Dashboard > Help & Resources

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

Below Help & Resources in the drop list is the Log Out button.
**CBO > Dashboard**

**Applications:**
The Your Applications and Cases section includes a high-level view of applications statuses.

**In Progress** status will display how many applications are in progress and not yet ready to submit.

**Submitted** status displays how many applications have been sent over to CalSAWS for the month.

**Received** status displays the number of applications that have been received by the county.

**Process** status displays the number of applications the county has processed from the CBO/FBO.

**Not Accepted** status displays the number of applications the county has not accepted.

**Documents Needed** displays the number of applications with documents to upload.

Click the **View** button next to the status to see applications in the selected status.
CBO Assistor Dashboard > Applications

A tile displays each application the CBO/FBO created.

Each tile displays the following:

✓ Application Number
✓ Application Name
✓ Application Status
✓ Documents Needed
✓ Remove Application (In Progress only)

Click the View Details button to see information about that application.
CBO Assistor Dashboard > Applications > Application Details

Application Details – displays application information

Verification Details – displays documents needed and provides a simple way to upload documents by clicking the Upload button.

Upload History – displays the last 12 months of documents uploaded to an application.

Upload Document – provides a way to upload other documents.

Delete Application – deletes the application from the system. After 12 months applications not submitted will drop off.
CBO Assistor Dashboard > Reports

The CBO/FBO can see all their applications. Choose the Report period by entering a date in the Date From and Date To fields and clicking the Apply button.

Each tile displays a program and the status of each application in the date range requested.

Click Export Data to create a report in MS Excel.
CBO Dashboard > Help Center > Program Details

Program Descriptions displays each program available with a brief description. Click on a program tile to view details about the program.

At the bottom of the page Apply Now or See If You Qualify buttons are available.
Help Center > Contact County

**Call Me.** allows you to leave a message for the County to call you back during regular business hours.

**Select Your County** drop list and find the county. Click on the **CALL ME** button and enter your **First Name**, **Last Name**, and **Phone Number** and click the **Submit** button.
Help Center > View 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.

Select any tile to open for detailed information.

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

Manager Dashboard

The CBO manager has the same access as an assistor and the following:

View Staff Applications – shows all staff members applications.

View Reports – displays reports for all staff or an individual.

Staff Management – allows the manager to mark as inactive for an assistor or add new assistors.
Manager Dashboard > View Staff Applications

Managers can choose to look at all Staff Applications or individual applications by clicking **Staff Name** drop list and selecting staff member.

Staff Status displays when Active or Inactive is selected.

Click the tile to see the applications in the status selected.

Managers can complete applications for staff but can’t re-assign to other staff members to complete.
Manager Dashboard > Reports

The Manager can see all their staff members applications.

Choose the Report period by entering Date From and Date To.

Click a staff member or all from the Staff Name drop list.

To see the Report, click the Apply button.

Each graph displays the application status for each program in the date range requested.

Click Export Data to create a report in excel.
Managers can add assistants and view staff information and mark a staff member as inactive.
Manager Dashboard > Staff Management > Add Staff

The manager can complete the Let’s create an assister account form. Complete the form and click the CREATE ASSISTER ACCOUNT button.