

BenefitsCal | Reference Guide: Community Based Organizations (CBOs) Dashboard

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

Table of Contents

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

[Assistor Dashboard](#)

[Applications](#)

[My Reports](#)

[Help & Resources](#)

[Manager Dashboard](#)

[Applications](#)

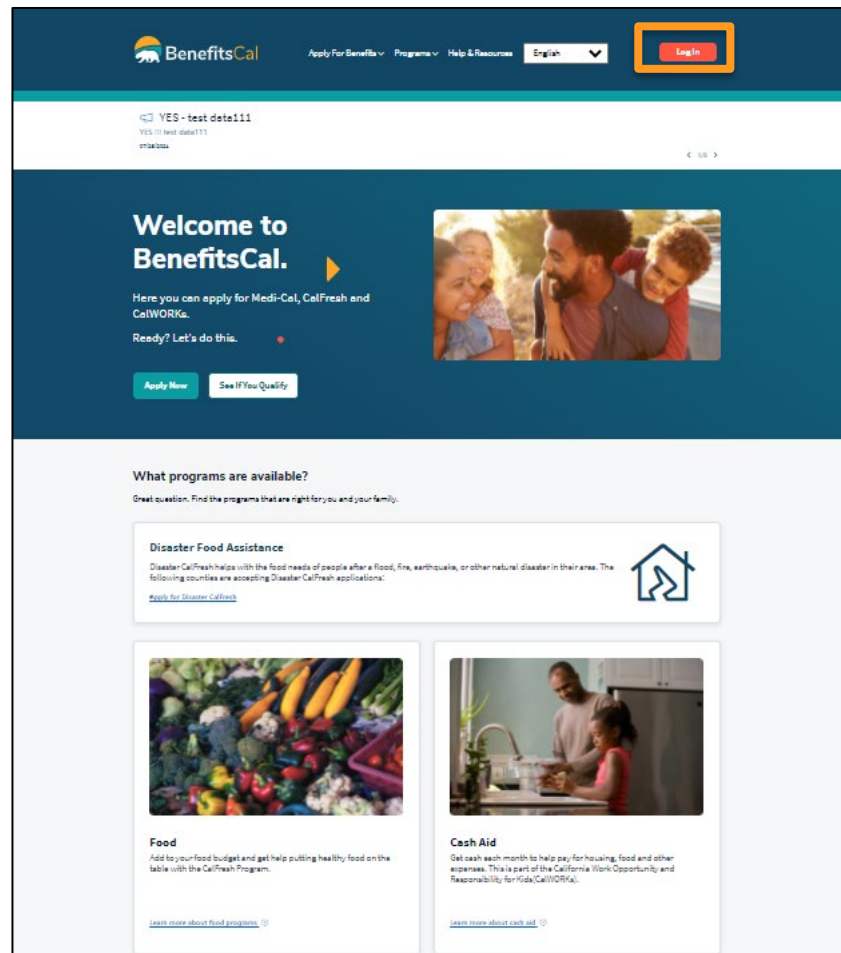
[My Reports](#)

[Staff Management](#)

1

Welcome to BenefitsCal – Homepage

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.

The screenshot displays the BenefitsCal login and registration interface. On the left, the 'Log In' section is highlighted with an orange border and contains fields for 'Email (required)' and 'Password (required)', a 'Forgot Your Password?' link, and a red 'Log In' button. On the right, the 'Create New Account' section is highlighted with an orange border and includes a teal 'Create Account' button. Below this, the 'Community Based Organizations (CBO)' section is also highlighted with an orange border and features a teal 'Register Your CBO Account' button. The interface is clean with a white background and blue accents.

CBO Assister Dashboard

The BenefitsCal assister 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.

The screenshot displays the BenefitsCal CBO Assister Dashboard for user ftkassister2. The dashboard is organized into four main sections, each highlighted with an orange border:

- Look at all you've accomplished!**: This section features a celebratory message "You are on a roll!" and a star icon with the number 2, indicating "You submitted 2 applications this month."
- My Reports**: This section provides key metrics about applications. It shows "Applications Submitted This Week" as 0 and "Applications Approved This Month" as 0, each with a star icon. A "View Reports" button is located below these metrics.
- Applications**: This section allows users to manage their applications. It includes a "New Application" button and a list of application statuses:
 - 1 In Progress (View button)
 - 2 Submitted (View button)
 - 0 Received (View button)
 - 0 Processed (View button)
 - 0 Not Accepted (View button)
 At the bottom, there is a "Documents Needed" section showing "4 Applications Need Documents" with a "View" button, and a "View My Applications" button.
- Help & Resources**: This section provides access to program details and contact information. It includes icons for "Program Details" and "Contact County", and a "View Help Center" button.

The top navigation bar includes the BenefitsCal logo, a user menu (Applications, Reports, Help & Resources), a language dropdown (English), and a user profile icon.

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.

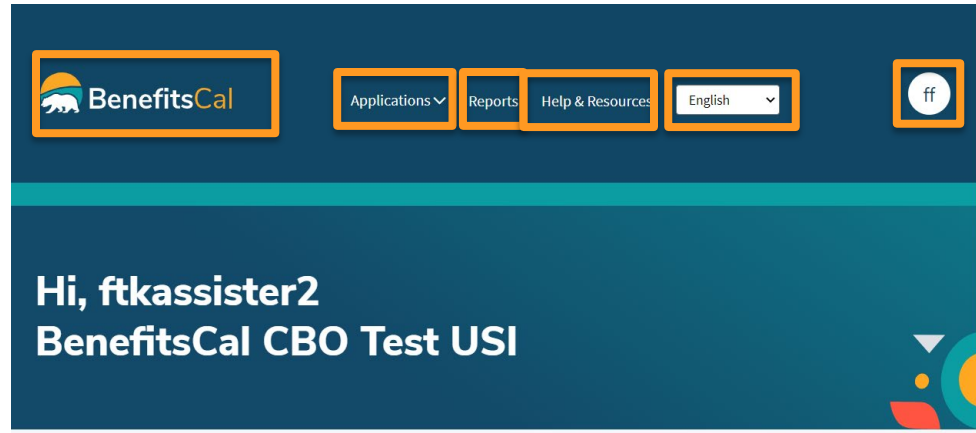
Applications – provides access to create a new application or view current applications

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.



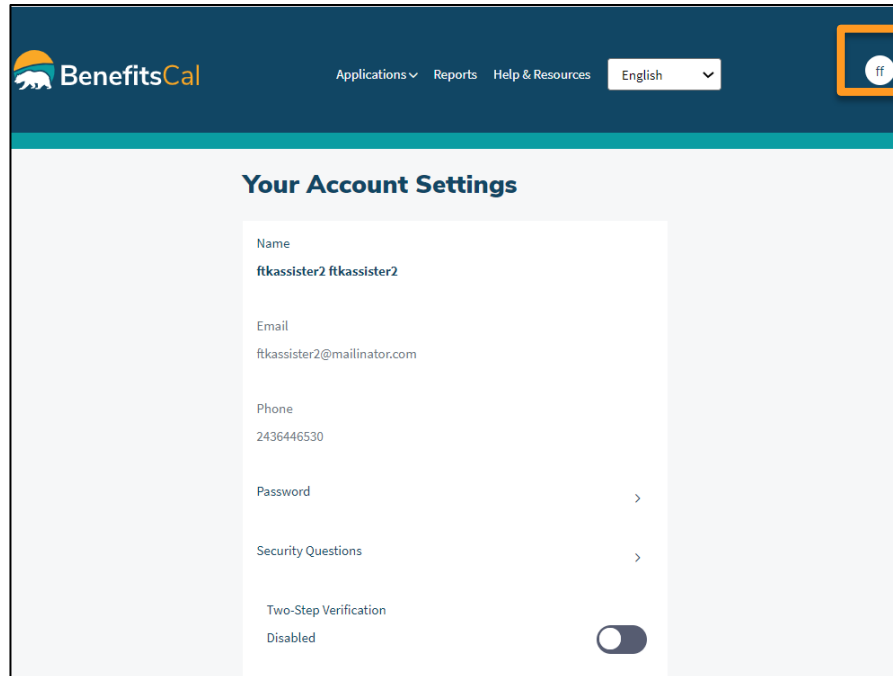
5

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.



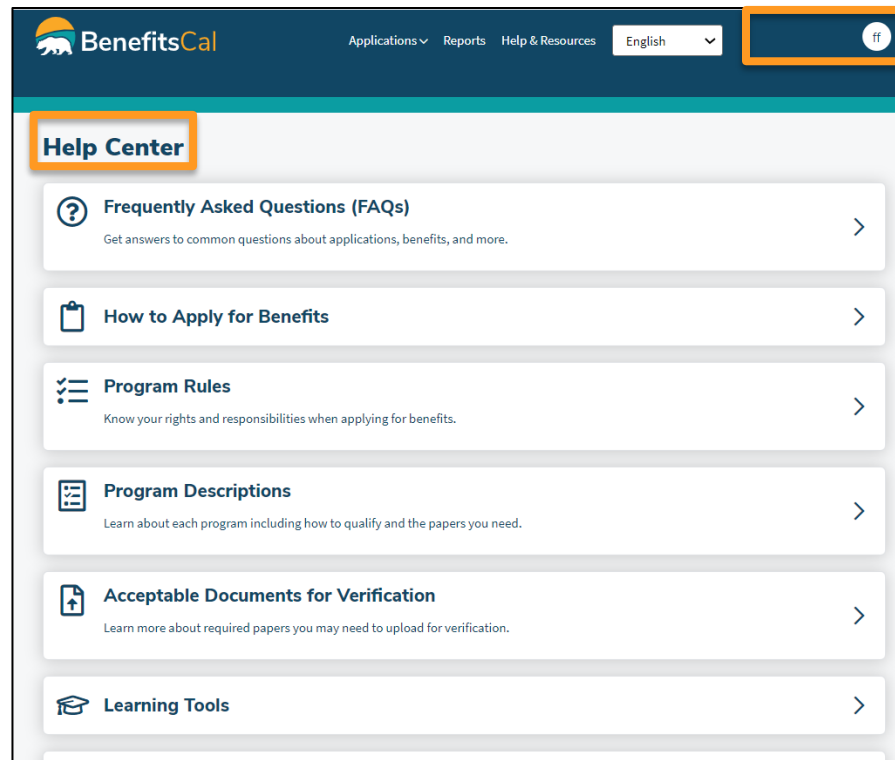
The screenshot shows the 'Your Account Settings' page in the BenefitsCal dashboard. The header includes the BenefitsCal logo, navigation links for Applications, Reports, and Help & Resources, a language dropdown set to English, and a user profile icon highlighted with an orange box. The main content area displays the following settings:

Field	Value
Name	ftkassister2 ftkassister2
Email	ftkassister2@mailinator.com
Phone	2436446530
Password	>
Security Questions	>
Two-Step Verification	Disabled

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.

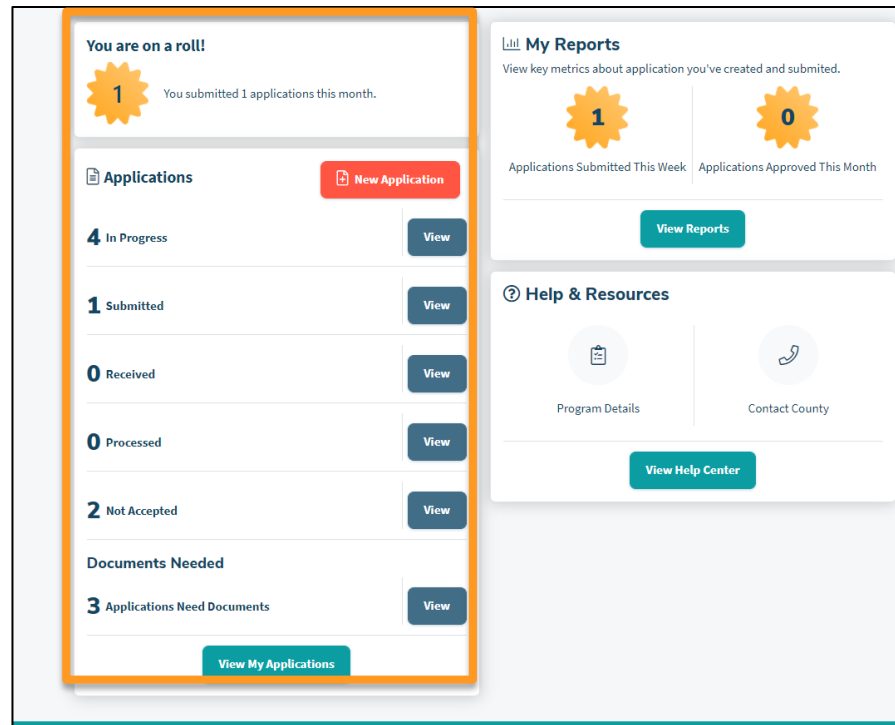
Received status displays the number of applications that have been received by the county.

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 file displays each application the CBO/FBO created.

Each file 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.

< Back to Dashboard

Applications

Let's review your applications.

Type the applicant name, or the application number/status to filter the results.

Filter

IN PROGRESS SUBMITTED RECEIVED PROCESSED NOT ACCEPTED DOCUMENTS NEEDED

Results (4)

Application Number	Last Name	First Name	Application Status	Action Items	Buttons
108471	King	Pumpkin	Submitted	2 Documents Needed	View Details
108473	Dollface	Sally	In Progress	07/27/2021	Continue, Remove Application
108988	Anna	Apple	Submitted	2 Documents Needed	View Details
108990	Bacon	Barbie	In Progress	08/02/2021	Continue, Remove 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.

Application Details for
108473

Application Details

First Name	Last Name
Sally	Dollface
Date of Birth	Application Date
//1985	07/27/2021
Application Status	Case Number
In Progress	Not Assigned

Verification Details

Upload Needed

Application Date6 Days Ago

Photo ID/Social Security Card
Sally Dollface (36)

Uploaded

Citizenship Verification/Birth
Certificate Sally Dollface (36)

Upload

Upload History

Below are the receipts for the documents you've uploaded in the past year.

Photo ID/Social Security Card	Sally Dollface (36)
07/27/2021	View Receipt

UPLOAD DOCUMENT

DELETE APPLICATION

BenefitsCal | Community Based Organizations (CBOs) Dashboard

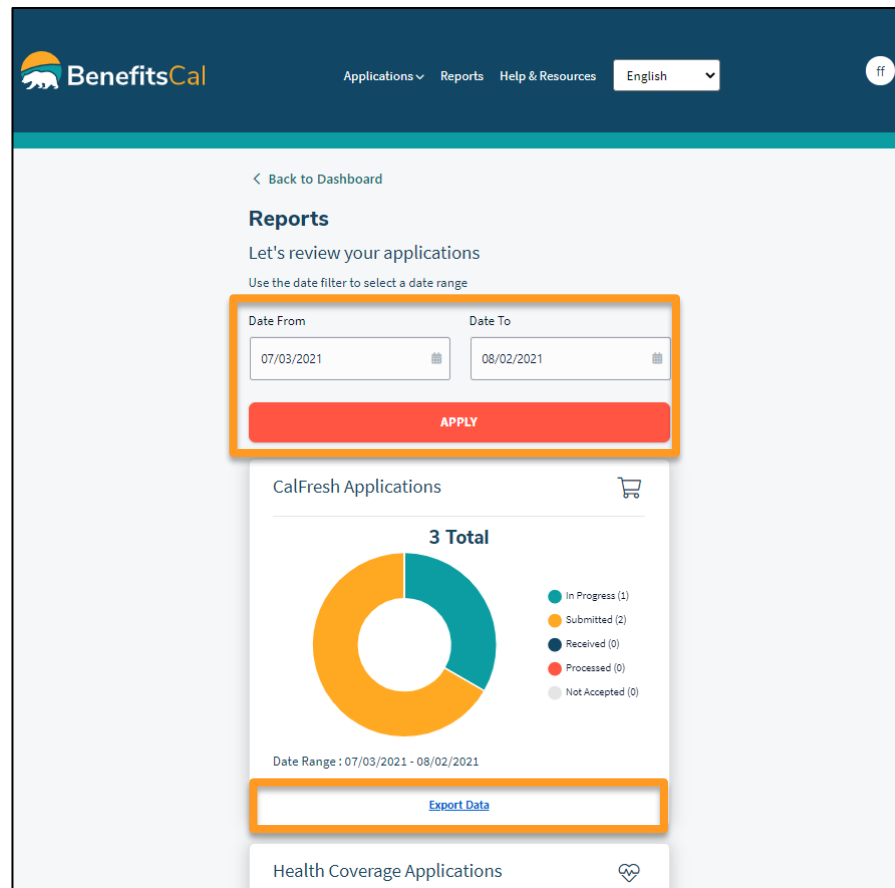
Page 10

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.


Program Descriptions




CalFresh (Food)
Add to your food budget and get help putting healthy food on the table with the CalFresh Program.




CalWORKs (Cash Aid)
Helps with cash to pay for rent, housing, food, clothing, and utilities for families with at least once child in the home.




Medi-Cal (Health Coverage)
Medi-Cal is free or low-cost health insurance for individuals or families. It includes help paying for private health care, such as premium assistance via a federal tax credit.




Disaster CalFresh
Helps with the food needs of people within a 30-day period after a flood, fire, earthquake, or other natural disaster.




County Medical Services Program (CMSP)
Temporary health coverage for uninsured low-income adults that are not eligible for other health care programs, who live in a CMSP County. If you apply for Medi-Cal, the county will check to see if you qualify. [View participating counties](#)




General Assistance or General Relief (GA/GR)
Relief and support to adults who are not supported by their own means, other public funds, or programs.



Cash Assistance Program for Immigrants (CAPI)
Cash aid to elderly, blind, and disabled people who are legally in the country. Recipients must not be able to get Supplemental Security Income/State Supplemental Payment (SSI/SSP) due to immigration status.



Welfare-to-Work (WtW)
If you receive CalWORKs and can work, you must take part in Welfare-to-Work activities to continue to receive cash aid. Welfare-to-Work is the Employment Program of the California Work Opportunity and Responsibility to Kids Program (CalWORKs).



General Relief Opportunities for Work (GROW)
Provides work and training to help employable General Relief (GR) customers get jobs for individuals who live in Los Angeles County.

Ready to apply or find out what you might be eligible for?

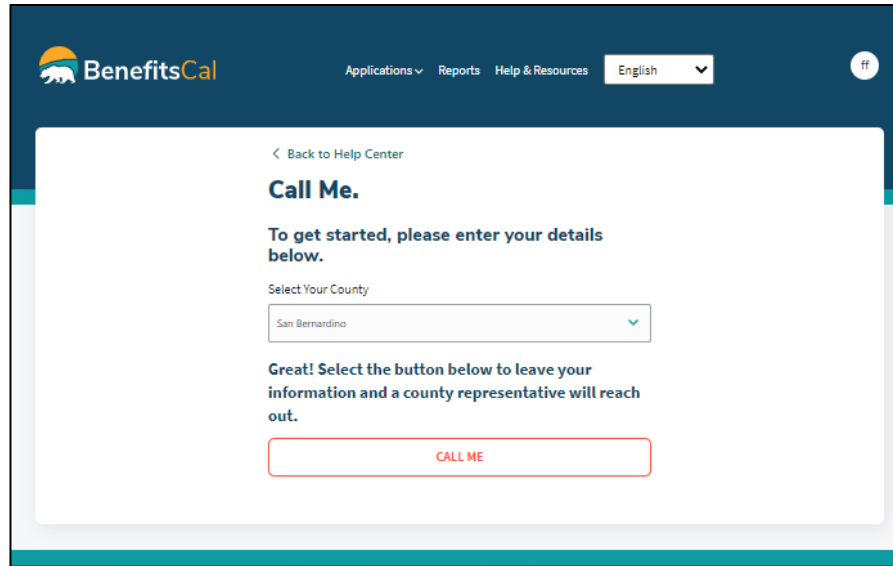
Apply Now

See If You Qualify

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.



BenefitsCal Applications Reports Help & Resources English

[Back to Help Center](#)

Call Me.

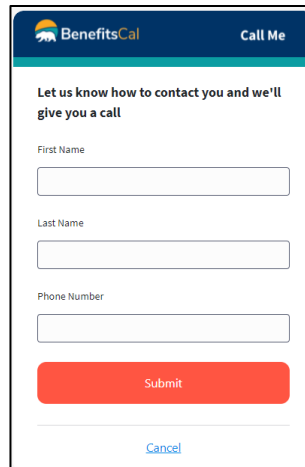
To get started, please enter your details below.

Select Your County

San Bernardino

Great! Select the button below to leave your information and a county representative will reach out.

CALL ME



BenefitsCal Call Me

Let us know how to contact you and we'll give you a call

First Name

Last Name

Phone Number

Submit

[Cancel](#)

Help Center > View Help Center

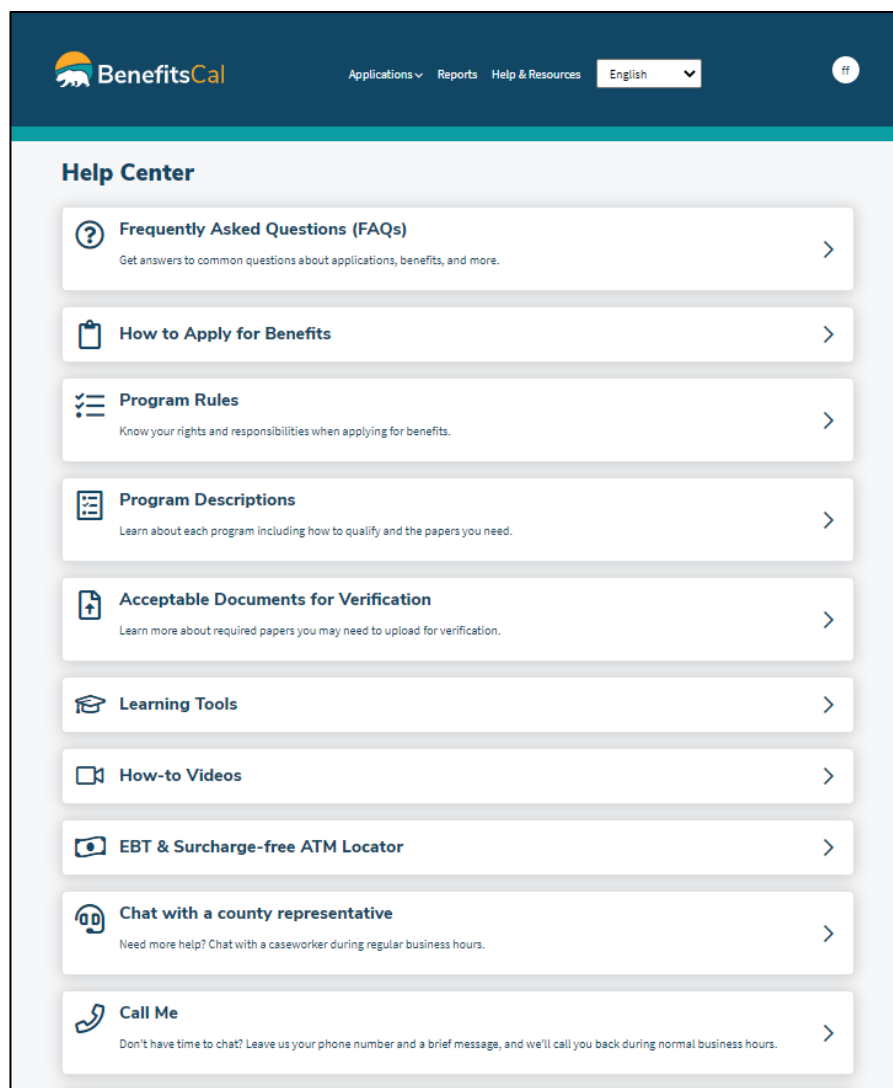
From the bottom of the Customer Dashboard, select the Take me to the help center hyperlink for help content. Alternatively, from the User Menu, select Help and Resources.

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:

14

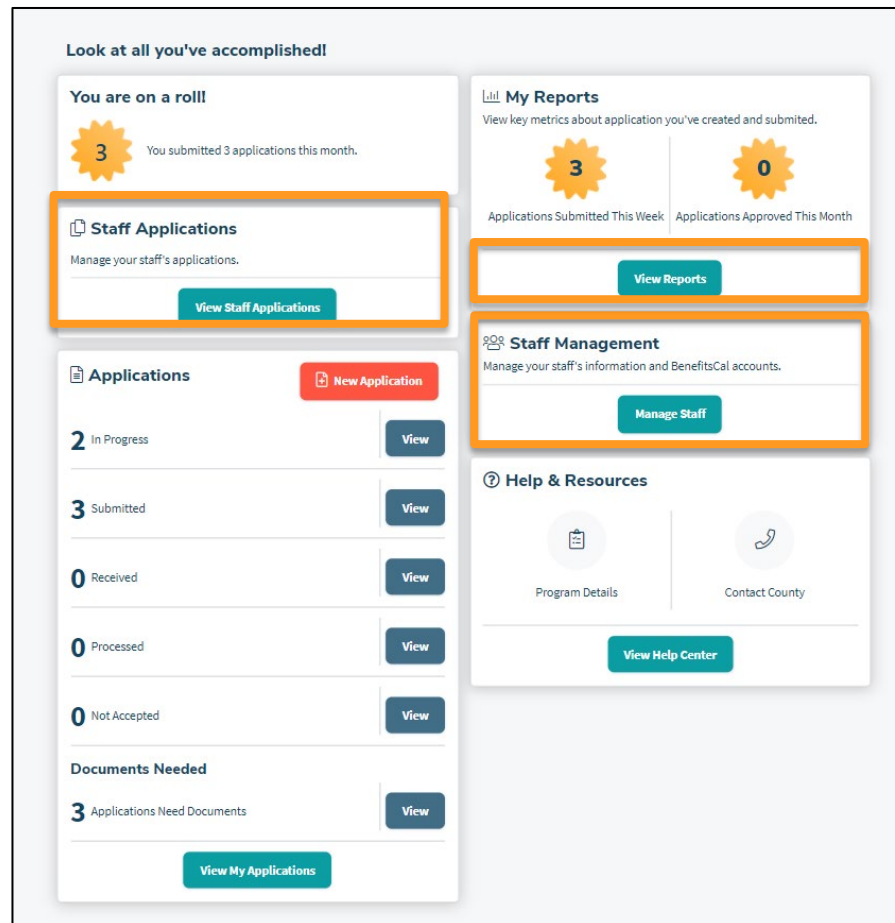
Manager Dashboard

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.

The screenshot displays the BenefitsCal Manager Dashboard. At the top, there is a navigation bar with the BenefitsCal logo, a menu (Applications, Staff Management, Reports, Help & Resources), a language dropdown (English), and a user profile icon (fM). Below the navigation bar, there is a link to "< Back to Dashboard".

The main content area is titled "Staff Applications". It features a "Staff Name" dropdown menu currently set to "All" and a "Staff Status" section with radio buttons for "Active" and "Inactive".

Below these filters, there are two staff member profiles, each with a set of application status tiles. The first profile is for "john doe" and the second is for "jack ryan". Each profile has a lock icon next to the name.

For "john doe", the application status tiles are:

- In Progress: 0
- Submitted: 0
- Received: 0
- Processed: 0
- Not Accepted: 0

For "jack ryan", the application status tiles are:

- In Progress: 0
- Submitted: 0
- Received: 0
- Processed: 0
- Not Accepted: 0

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.

Reports

Let's review your reports.

Use the date filter to select a date range or select the name of a staff member

Date From

Date To

07/12/2021

08/12/2021

Staff Name

All

APPLY

CalFresh Applications

3 Total

In Progress (1)

Submitted (2)

Received (0)

Processed (0)

Not Accepted (0)

Date Range : 07/12/2021 - 08/12/2021

Assister : All Staff

Export Data

Health Coverage Applications

2 Total

In Progress (0)

Submitted (1)

Received (0)

Processed (0)

Not Accepted (0)

Date Range : 07/12/2021 - 08/12/2021

Assister : All Staff

Manager Dashboard > Staff Management

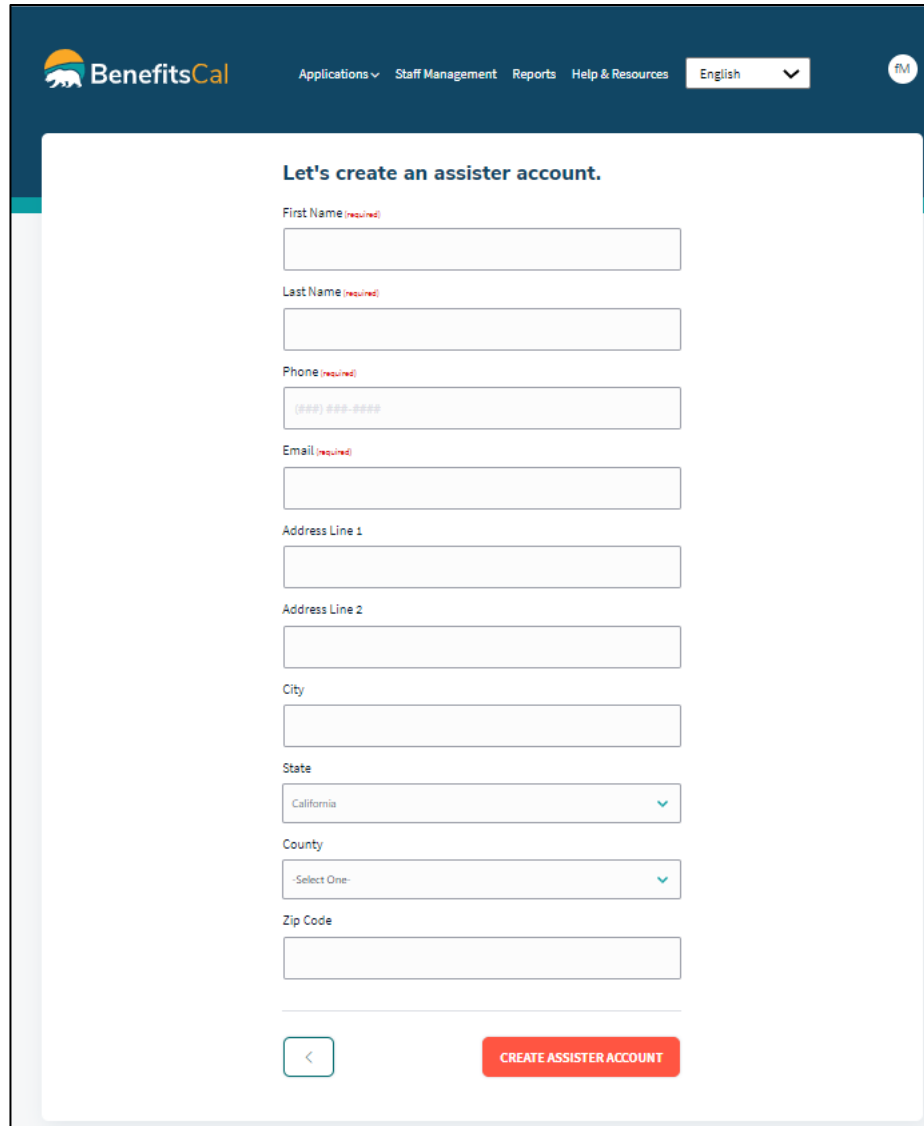
Managers can add assistors and view staff information and mark a staff member as inactive.

The screenshot shows the 'Staff Management' section of a dashboard. At the top, there is a navigation bar with links for 'Applications', 'Staff Management', 'Reports', and 'Help & Resources', along with a language dropdown set to 'English'. Below the navigation bar, a 'Back to Dashboard' link is visible. The main heading is 'Staff Management'. To the right of this heading is an 'ADD STAFF' button. Below the heading, there are two filter sections: 'Staff Name' with a dropdown menu currently set to 'All', and 'Staff Status' with radio buttons for 'Active' (selected) and 'Inactive'. Below these filters is a list of staff members, each with a checkmark icon and a name. The first staff member is 'kia mark', followed by 'liam dwer', and 'zoey jack'. To the right of each name is a 'VIEW' button. The 'ADD STAFF' button and the 'VIEW' button for 'kia mark' are highlighted with orange boxes.

Staff Name	Staff Status	Action
All	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive	
✓ kia mark		VIEW
✓ liam dwer		VIEW
✓ zoey jack		VIEW

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.



The screenshot shows the 'Let's create an assister account' form within the BenefitsCal interface. The form is titled 'Let's create an assister account.' and contains the following fields:

- First Name (required)
- Last Name (required)
- Phone (required) with a placeholder (888) 888-8888
- Email (required)
- Address Line 1
- Address Line 2
- City
- State (dropdown menu showing California)
- County (dropdown menu showing -Select One-)
- Zip Code

At the bottom of the form, there is a back button (left arrow) and a red button labeled 'CREATE ASSISTER ACCOUNT'.