

BenefitsCal | Quick Guide: Community Based Organization Request Access

Purpose

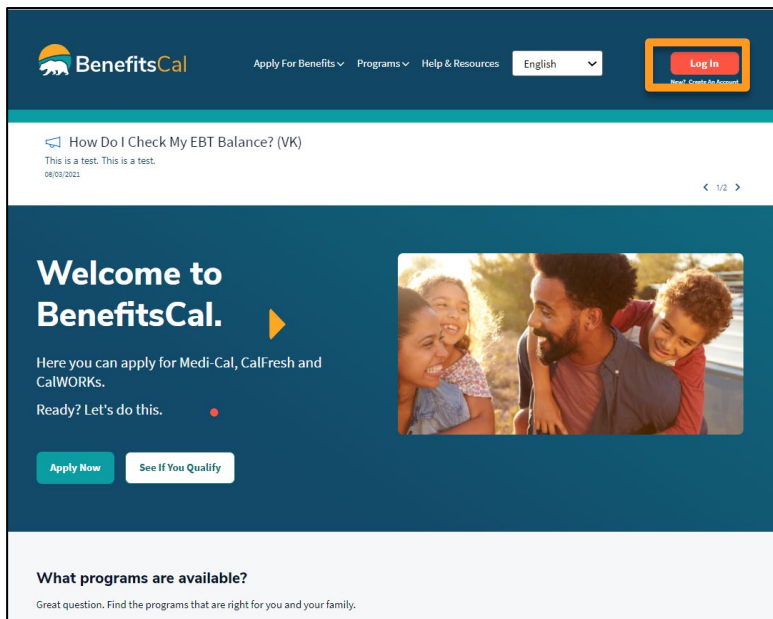
The purpose of the BenefitsCal Quick Guide is to provide instructions to assist Community Based Organization Managers submit an Access Request, to gain access to the BenefitsCal application.

Community Based Organizations can submit an access request to the County they work with the most. Once access is provided, the CBO may submit applications on behalf of customers in any County using BenefitsCal.

Please note: Only Counties currently using BenefitsCal will accept access requests for BenefitsCal.

CBO Request Account:

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BenefitsCal Home Page

Click the **Log In** button.

Register your Community Based Organization.

1 Organization Name required
Helpful People

2 Primary Contact First Name required
Jane

Primary Contact Last Name required
Dough

3 Address Line 1 required
116 Ponderosa Lane

Address Line 2

City required
Grass Valley

State
California

4 County required
Nevada

Zip Code required
95949

Mobile Phone
555-042-4242

5 Email required
j.helpfulpeople@gmail.com

I understand and agree to the [Terms and Conditions](#).

Register

Register Your CBO Account

1. Enter the name of the Organization for the user requesting access.
2. Enter the First and Last name of the user requesting access.
3. Enter the actual address of the user requesting access.
4. From the drop list select the **County** the user works with most often. If that county is not currently using BenefitsCal, select a BenefitsCal County that you serve. This is the County that will review the access request.

Please note: this County can be different from the address provided within the form.

5. Enter the email address for the user. This will become the user's ID to access BenefitsCal.

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

Click the **Register** button.

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The screenshot shows the BenefitsCal website interface. At the top, there is a navigation bar with the logo, menu items like 'Apply For Benefits', 'Programs', and 'Help & Resources', a language dropdown set to 'English', and a 'Log In' button. The main content area features a large green checkmark icon and the text: 'Your request is on its way to the county!'. Below this, it asks 'What happens next?' and lists two steps: 1. 'We'll review your request.' (with a magnifying glass icon) and 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.' (with a clipboard icon). A note at the bottom of the main area says 'Make sure to check your spam folder if you haven't received it in a couple of days.' and a 'BACK TO HOME' button is at the bottom right. The footer contains three columns: 'Contact Us' with links for office support, technical issues, and user feedback; 'Help & Resources' with links for frequently asked questions, programs, and a help page; and 'BenefitsCal' with a description of the portal and its sponsors (CALSWIS, the Department of Social Services, and the Department of Health Care Services).

Request is on its way

Account request sent to the County specified in the form, for review and to provide access.

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The screenshot shows an email notification. It starts with 'Hello,' followed by the main message: 'We created your CBO account on the BenefitsCal portal. Please follow the below instructions to complete your account registration process.' The user ID is listed as 'Your userID: johndoe10@mailinator.com'. The email instructs the user to 'Please verify your email address and set your password by clicking on this link:' followed by a red hyperlink: '[Complete your BenefitsCal Registration](#)'. A note states: 'Please do not reply to this email. It has been automatically generated and replies will go to an unattended inbox.' Contact information is provided: 'If you have any questions, contact us at help@BenefitsCal.org'. The email ends with 'Thank you, BenefitsCal'. A disclaimer at the bottom states: 'This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delete this message. Any unauthorized disclosure, copying, or distribution of this message, or the taking of any action based on it, is strictly prohibited.' The footer of the email contains the BenefitsCal logo and social media icons for Facebook and Twitter.

CBO Email

When the County approves the request and provides access, the CBO user will receive an email like this below.

The user should click **Complete your BenefitsCal Registration** hyperlink to verify the email address and set the password for future logins.