

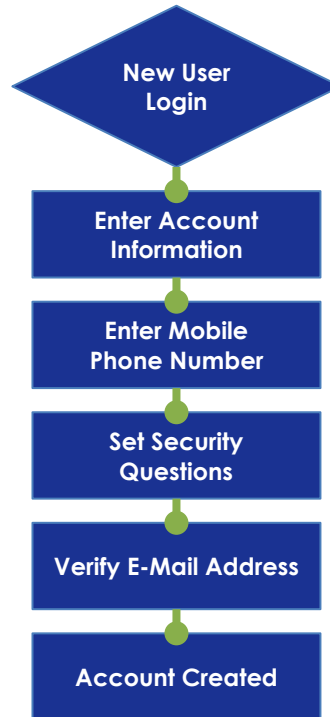
## BenefitsCal | Quick Guide: Create an Account for New Users

### Purpose

The purpose of the BenefitsCal Quick Guide is to provide instructions to assist users in creating a new account in BenefitsCal.

There are benefits to an account in BenefitsCal, such as having access to view case information, benefit balances, upload documents, to opt in/out of email and text message notifications, and more.

### High-Level Process Flow



### FAQs

**Q: Do customers have to create an account?**

**A:** No, but it's recommended so they can see their case information.

**Q: Is creating an account the same as applying?**

**A:** No. Creating an account is not applying. After creating an account, log in and click My Applications tab to apply.

**Q: Can customers have more than one account?**

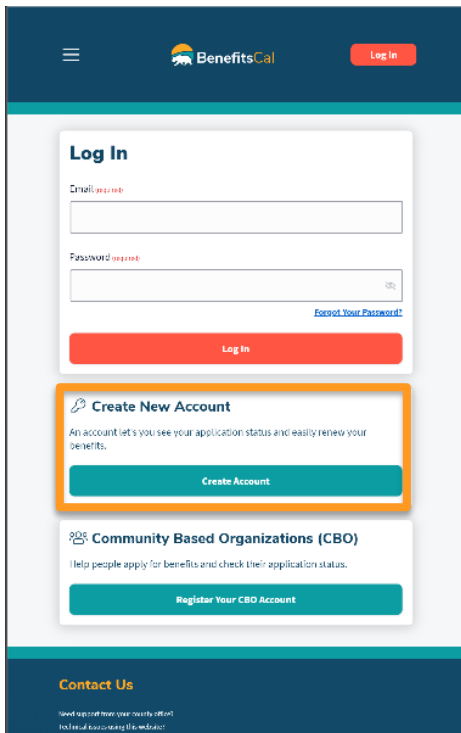
**A:** Customers can only have one account per email address. And, only one email address/account can be linked to a given case.

**Q: Why is the customer dashboard blank?**

**A:** If you do not see specific case details, you may need to link the case to the account.

## Create Account Process:

1

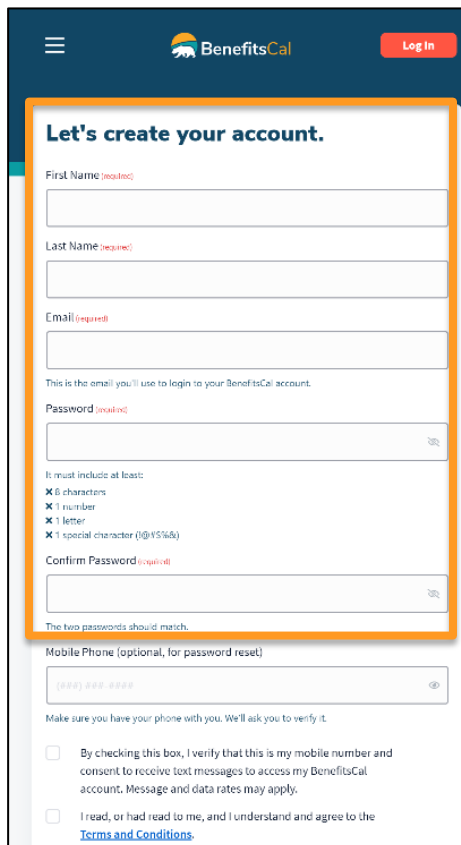


The screenshot shows the BenefitsCal website's login page. At the top, there is a navigation bar with the BenefitsCal logo and a 'Log In' button. Below the navigation bar, there is a 'Log In' section with fields for 'Email (required)' and 'Password (required)', a 'Log In' button, and a link for 'Forgot Your Password?'. Below the 'Log In' section, there is a 'Create New Account' section highlighted with an orange border. This section contains the text 'An account lets you see your application status and easily renew your benefits.' and a 'Create Account' button. Below the 'Create New Account' section, there is a 'Community Based Organizations (CBO)' section with the text 'Help people apply for benefits and check their application status.' and a 'Register Your CBO Account' button. At the bottom of the page, there is a 'Contact Us' section with the text 'Need support from your nearby office? Contact us using the widget.'

### New User Login

Click the **CREATE ACCOUNT** button.

2



The screenshot shows the BenefitsCal website's 'Create Account Information' page. The page is titled 'Let's create your account.' and contains several required fields: 'First Name (required)', 'Last Name (required)', 'Email (required)', 'Password (required)', and 'Confirm Password (required)'. The password field has a list of requirements: 'It must include at least: 8 characters, 1 number, 1 letter, 1 special character (!#\$%&@)'. There is also a field for 'Mobile Phone (optional, for password reset)' and a checkbox for consent: 'By checking this box, I verify that this is my mobile number and consent to receive text messages to access my BenefitsCal account. Message and data rates may apply.' and 'I read, or had read to me, and I understand and agree to the Terms and Conditions.'

### Create Account Information

Complete the following fields: **First Name**, **Last Name**, **Email**, and **Password**.

The password must be eight (8) or more characters long and must include at least one (1) of each of the following:

- ✓ Number
- ✓ Letter
- ✓ Special character (!#\$%&)



If the passwords entered do not match, the system will display an error message.

3

The screenshot shows a registration form with fields for Last Name, Email, Password, and Confirm Password. A 'Mobile Phone (optional, for password reset)' field is highlighted with an orange border. Below it, there are two checkboxes: the first is for verifying the mobile number for text messages, and the second is for agreeing to terms and conditions. A 'Next' button is at the bottom right.

### Enter Mobile Phone Number

Enter a **Mobile Phone** number. This is an optional field.



With a mobile phone number, the customer can receive text message notifications and codes to recover their account.

Click the checkbox to provide consent to receive text messages if a mobile number is entered.



Consent is required if a mobile phone is entered.

Click the second checkbox acknowledging the **Terms and Conditions**. Click the **NEXT** button.



If the check box is not selected, a message will display at the top stating **“Please select this checkbox”** Consent is required.

4

The screenshot shows the 'Set Security Questions' screen. It has a header with the BenefitsCal logo and a 'Log In' button. The main heading says 'Now, let's set up a few questions in case you forget your password.' Below this, there are three sets of questions, each with a dropdown menu for the question and a text input for the answer. The entire form area is highlighted with an orange border. At the bottom, there is a back arrow and a 'Create Account' button.

### Set Security Questions

Choose and answer three (3) **Security Questions** to set up the account.

Click **Create Account** button.

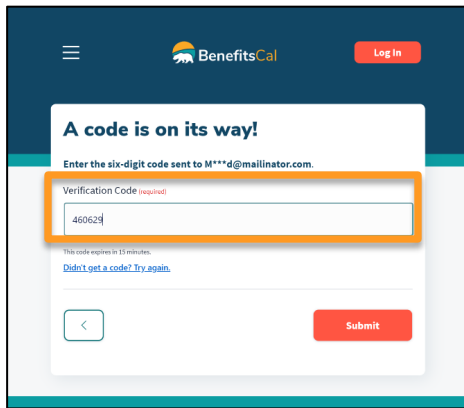


The answers to the security questions cannot be the same: each question needs a unique answer.



The answers to the security questions must include only letters and numbers, no special characters (%\$#).

5

A screenshot of the BenefitsCal website showing a verification code entry screen. The page has a dark blue header with the BenefitsCal logo and a 'Log In' button. The main content area is white with a blue border. It features a heading 'A code is on its way!' and a sub-heading 'Enter the six-digit code sent to M\*\*\*d@mailinator.com.' Below this is a text input field labeled 'Verification Code (required)' containing the code '460629'. A red box highlights the input field. Below the input field, there is a note 'This code expires in 15 minutes.' and a link 'Didn't get a code? Try again.' At the bottom, there is a back arrow button and a red 'Submit' button.

## Verify Email Address

Next, the BenefitsCal system will send an email with a verification code, to complete the new account setup.

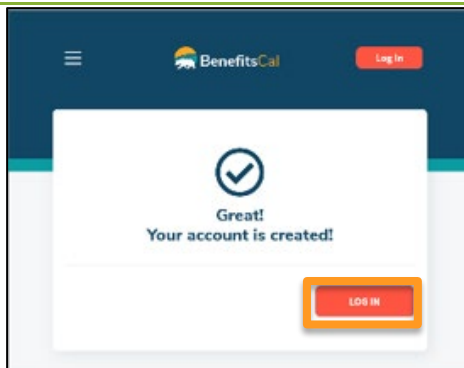
Enter the code provided via email to confirm the account.

Click the **SUBMIT** button.



If the verification code is not correct, an error message displays "**Please enter a valid code.**"

6

A screenshot of the BenefitsCal website showing a success message. The page has a dark blue header with the BenefitsCal logo and a 'Log In' button. The main content area is white with a blue border. It features a large green checkmark icon, the text 'Great!', and 'Your account is created!'. At the bottom right, there is a red 'LOG IN' button.

## Account Created

Once the verification code(s) are entered correctly, the BenefitsCal account is created and ready for login.

Next, login to BenefitsCal with the new credentials.