



Fact Sheet: CBO Accounts

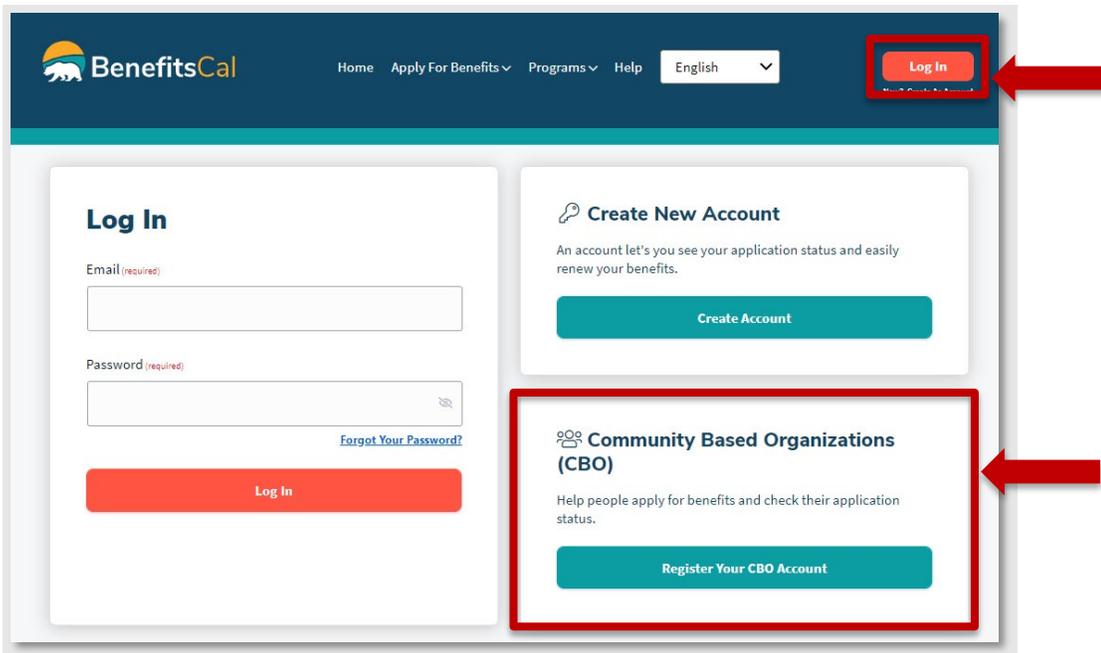
The purpose of this fact sheet is to provide information about CBO Accounts.

What is the status of my CBO Access Request?

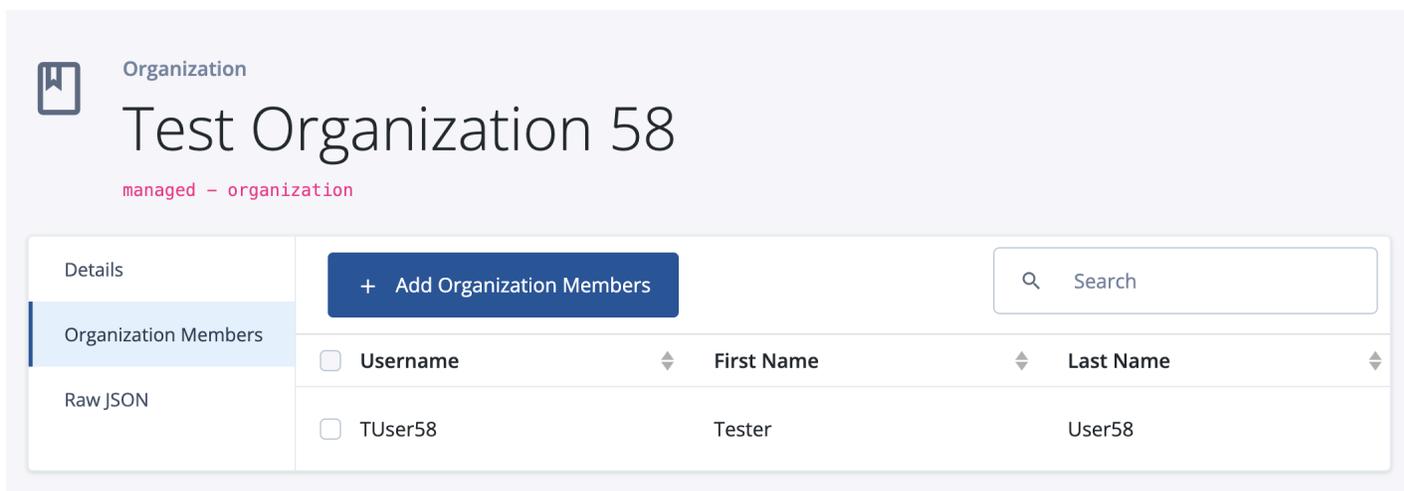
- Check that the CBO submitted an access request. (This is done in CalSAWS through the Case Info > Task > Worklist navigation with type of “External Agency Admin” as the category)

The screenshot displays the CalSAWS Worklist interface. At the top, there is a navigation bar with tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Case Info' tab is active. On the left, a 'Tasks' sidebar is visible with options like Worklist Summary, Worklist, Worklist PR RE, Work Order, and Approvals. The main 'Worklist' area includes a search bar and various filters: Category (External Agency Admin), Status (All), Priority (All), Type (All), Case Number (with a 'Select' button), Organization Level, Organization Name, Search By (Due Date), From/To dates (05/23/2022 to 05/27/2022), and Primary Case Language (English, Spanish, Afghani). A 'Results per Page' dropdown is set to 50, and a 'Search' button is at the bottom right.

- If not, assist the CBO in submitting a BenefitsCal registration request. Direct them to BenefitsCal.com, click on the Login button, click on the Register Your CBO Account, complete the form, and submit.



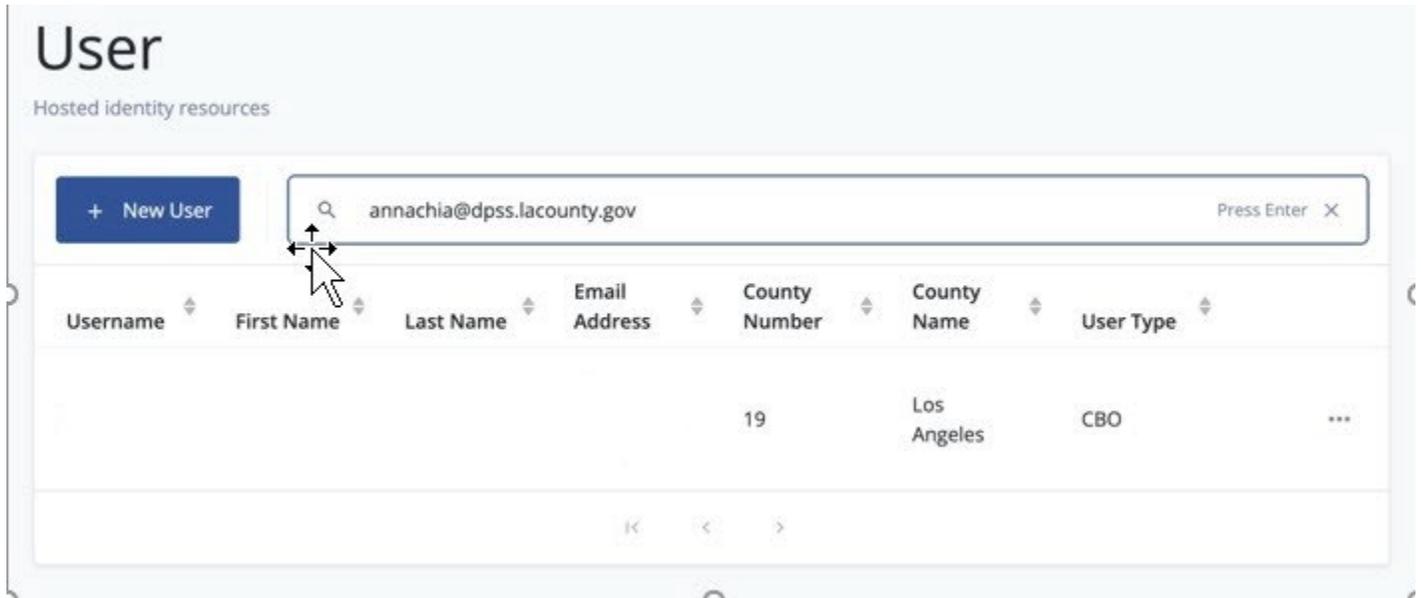
- If a request does exist, appropriate County staff will process the access request. This will require Delegated Admin Access rights to create the CBO.
- Designated staff will create the CBO account
- At least one CBO Manager account must be created for the organization.



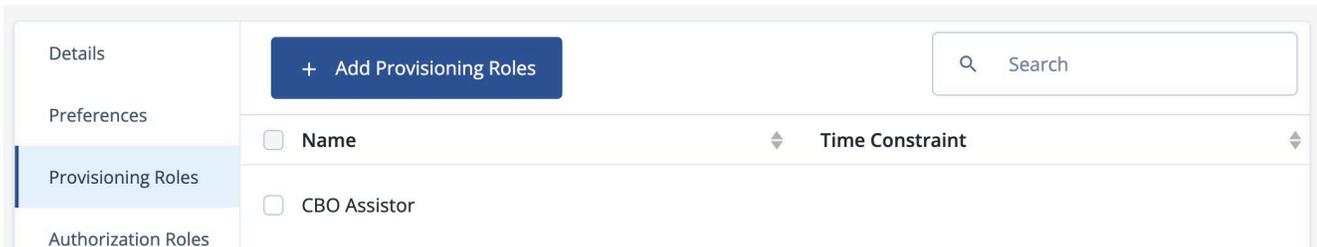
- The CBO Manager should add subsequent CBO staff members.

I'm a CBO, and I'm not able to login.

- Check that the CBO has a CBO account within ForgeRock.



- If the account is setup as a customer account, instead of a CBO account, create a support ticket for your County Delegated Admin user to fix the account type.
- Check that the CBO account is setup correctly
 - Role assigned



- Linked to an organization



- Status = Active



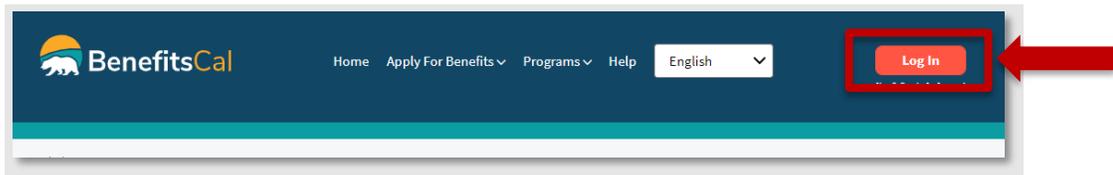
- Verify the email address with the CBO (is it the email address they are expecting)
- Check to see if the CBO has logged in yet
 - Once you have searched for the user, click on the user's entry in the table to edit, or click the three dots on the far right and select "Edit"



- The individual user's information page will contain information about their account

- Navigate down to where it says “Last Login Time”—if there is a timestamp then the user has logged in before

- If not, help the CBO to login. CBO user will proceed to the Login screen and select “Forgot Your Password”, follow the prompts.





The image shows a login form titled "Log In". It contains two input fields: "Email (required)" and "Password (required)". Below the password field is a red-bordered box containing the text "Forgot Your Password?". A red arrow points from the right side of the page towards this link. At the bottom of the form is a red "Log In" button.

The user wants a CBO Manager role /or/ wants to change their role from a CBO Staff user to a CBO Manager user.

- Create a support ticket for your county's Delegated Admin user to add or adjust the type to CBO Manager.

Los Angeles County Only

I am a Customer Service Center employee, and I cannot login /or/ need an account.

- If a Los Angeles County employee needs to be Added, Removed or Modified in BenefitsCal, create a service ticket for the DPSS Help Desk.
 - Please use "LA STAFF CBO" in the ticket title for expedited processing. Please include details of what action needs to be taken (i.e., Add, Edit, inactivate...etc.) and include employee's e-number, email address and contact information (i.e., phone number).
- The DPSS Help Desk escalates the ticket to CalSAWS Project for assistance/processing.
- **Do not update/add the employee via the BenefitsCal portal.**