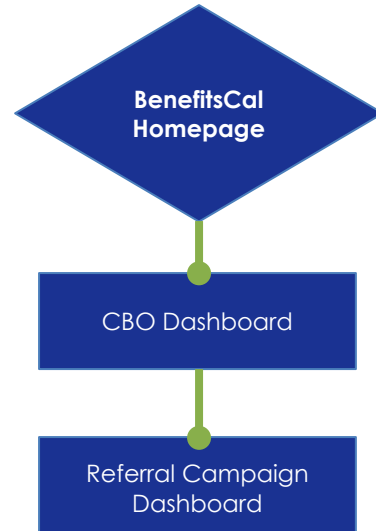


BenefitsCal | Quick Guide: CBO Referral Campaign

Purpose

The purpose of this BenefitsCal Quick Guide is to provide an overview of the Community Based Organizations (CBOs) referral campaign functionality.

High-Level Process Flow



FAQs

Q: What information can the CBO see when an application was submitted via referral URL?

A: Only aggregate counts for submitted applications by county and programs.

Q: Is there a limit to the number of CBO referral URLs a CBO can create?

A: No.

Q: Can the whole organization see the referral URLs?

A: Yes, the referral URLs and the associated data is connected to the whole organization.

Q: Do CBO Managers and Assisters have the same functionality?

A: No. CBO Managers can create or archive a referral URL, view campaign data, and generate reports. CBO Assisters can see the active referral URLs and view campaign data.

CBO Referral

1

BenefitsCal Home Apply For Benefits Programs Help English Log In

Log In

Email (required)

Password (required)

[Forgot Your Password?](#)

Log In

Create New Account

An account let's you see your application status and easily renew your benefits.

Create Account

Community Based Organizations (CBO)

Help people apply for benefits and check their application status.

Register Your CBO Account

Login Page

Log in using your CBO email account and password.

2

Look at all you've accomplished!

You are on a roll!

0 You submitted 0 applications this month.

Submit Documents

Upload documents for an application or case to any county.

[Upload A Document](#)

Staff Applications

Manage your staff's applications.

[View Staff Applications](#)

My Reports

View key metrics about application you've created and submitted.

0 Applications Submitted This Week

0 Applications Processed This Month

[View Reports](#)

Applications

[New Application](#)

- 0** In Progress [View](#)
- 0** Submitted [View](#)
- 0** Received [View](#)
- 0** Processed [View](#)
- 0** Not Accepted [View](#)

Documents Needed

- 0** Applications Need Documents [View](#)

[View My Applications](#)

Staff Management

Manage your staff's information and BenefitsCal accounts.

[Manage Staff](#)

Referral Campaigns

Manage your referral campaigns and export your campaign reports.

0 Applications submitted using a referral code this month.

[View Referral Campaigns](#)

Help & Resources

- [Program Details](#)
- [Contact County](#)

[View Help Center](#)

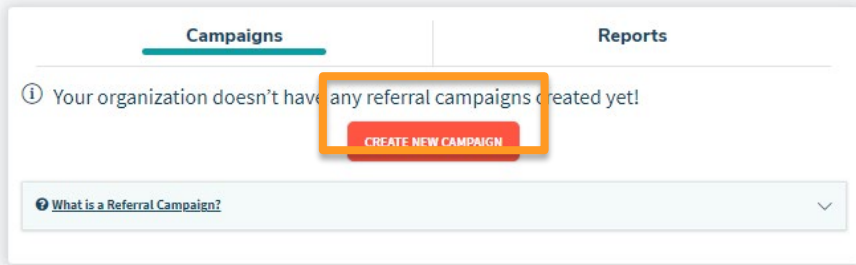
CBO Dashboard

Referral Campaigns can be accessed from the CBO Dashboard.

Click the **VIEW REFERRAL CAMPAIGNS** button.

3

Referral Campaigns



Referral Campaigns

Create a referral campaign.

Click the **CREATE NEW CAMPAIGN** button to begin.

< Back to Referral Campaigns

Create New Referral Campaign

Campaign Name (required)

This is the title of your referral campaign.

Campaign Start Date (required)

This is the date we will start tracking applications submitted via this referral campaign.

Custom Referral Code (required)

This will be used to generate your referral URL.

Preview of Referral URL

CREATE REFERRAL CAMPAIGN

Create New Referral Campaign

Enter the following:

- Campaign Name
- Campaign Start Date
- Custom Referral Code

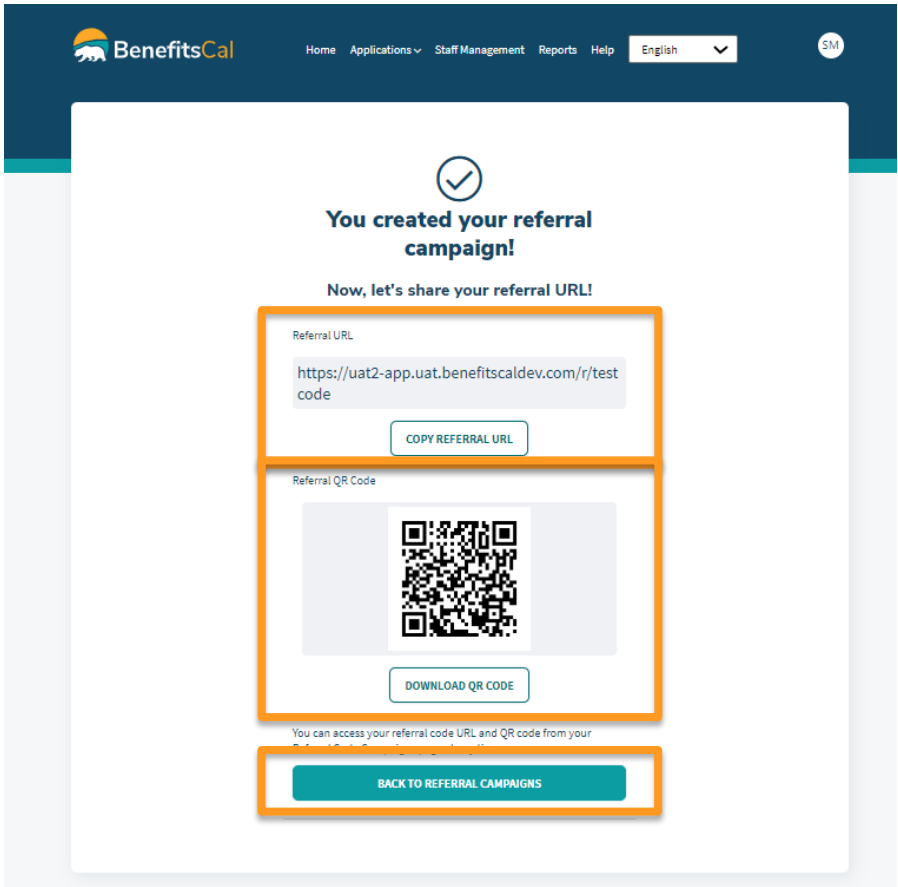


The custom referral code will generate the referral URL.



Edits cannot be made once the referral campaign is launched.

Click the **CREATE REFERRAL CAMPAIGN** button.

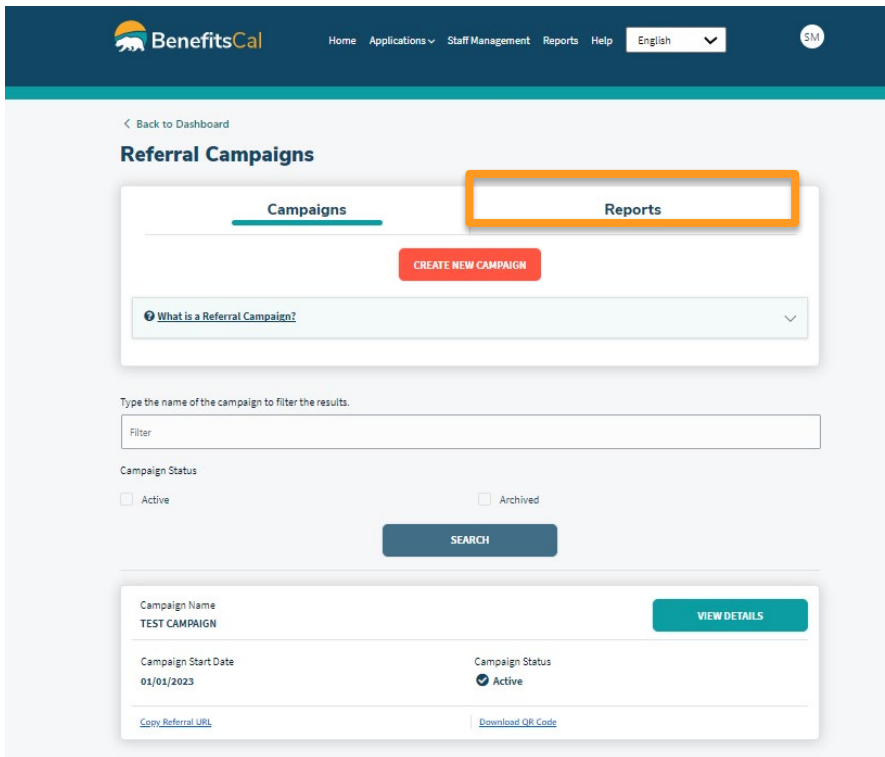


You created your referral campaign!

A custom referral URL has been created, which can be copied and pasted as needed.

A custom QR code has also been created and can be downloaded for use.

Click the **BACK TO REFERRAL CAMPAIGNS** button.



Referral Campaign Dashboard – Campaigns

Once at least one referral campaign has been created, the CBO user can:

- Search existing campaigns
- View details of existing campaigns
- Grab custom URLs and QR codes
- Create a new campaign

To generate reports on referral campaigns, navigate to the Reports tab.

Click the **REPORTS** button to start a report.

BenefitsCal Home Applications Staff Management Reports Help English nM

< Back to Dashboard

Referral Campaigns

Campaigns | **Reports**

Generate a Report
Select the campaign data you would like to export.

Applications submitted between:

Date From: 08/01/2022 Date To: 10/01/2022

Campaign Status

Active Archived

Campaigns

Text:(MMFBWUP) x Text:(TZXGCPG) x

EXPORT CAMPAIGN DATA

Referral Campaign Dashboard – Reports

CBO users have flexibility in how they run reports. You can select the following parameters:

- Date range
- Active/Archived status
- Campaign names



If no parameters are selected, all data will be exported.

Reports will include aggregate data on the count of applications by campaign, county, and program.

Click the **EXPORT CAMPAIGN DATA** button to download an Excel report.