

BenefitsCal | Quick Guide: Create an Account for New Users

Purpose

The purpose of this 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 and benefit balances, upload documents, 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 you can see your 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 the My Applications tab to apply.

Q: Can customers have more than one account?

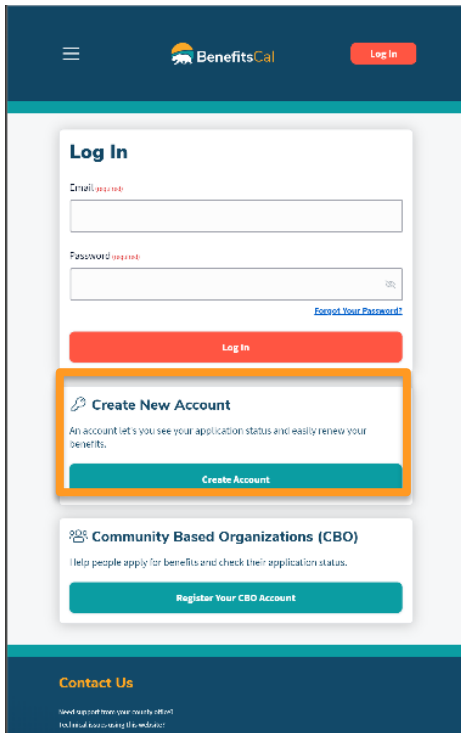
A: Customers can only have one account per email address AND only one email address/account can be linked to a given case.

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 interface. At the top, there is a dark blue header with the BenefitsCal logo and a 'Log In' button. Below the header, the main content area is white. It features a 'Log In' section with input fields for 'Email' and 'Password', a 'Log In' button, and a 'Forgot Your Password?' link. Below this is a 'Create New Account' section, which is highlighted with an orange border. It includes a heading 'Create New Account', a sub-heading 'An account lets you see your application status and easily renew your benefits.', and a 'Create Account' button. Below that is a 'Community Based Organizations (CBO)' section with a heading, a sub-heading 'Help people apply for benefits and check their application status.', and a 'Register Your CBO Account' button. At the bottom, there is a 'Contact Us' section with a heading and two lines of small text.

New User Login

Click the **CREATE ACCOUNT** button.

2

Create Account Information

Complete the following fields:

- **First Name**
- **Last Name**
- **Email**
- **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

Enter Mobile Phone Number

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



With a mobile phone number, you 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 BenefitsCal account setup interface. At the top, there is a navigation bar with the BenefitsCal logo and a 'Log In' button. Below the navigation bar, a white box contains the heading 'Now, let's set up a few questions in case you forget your password.' The main content area is a form with three security questions. Each question consists of a dropdown menu for selecting a question and a text input field for the answer. The questions are: 'First Security Question', 'Second Security Question', and 'Third Security Question'. Below the form, there is a back arrow button and a red '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

The screenshot shows the BenefitsCal account setup interface. At the top, there is a navigation bar with the BenefitsCal logo and a 'Log In' button. Below the navigation bar, a white box contains the heading 'A code is on its way!' and the instruction 'Enter the six-digit code sent to M***d@mailinator.com.' The main content area is a form with a single text input field for the verification code. The code '460629' is entered in the field. Below the input field, 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 email.

Click the **SUBMIT** button.



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

If the optional Mobile Phone number was included, the number must also be verified.

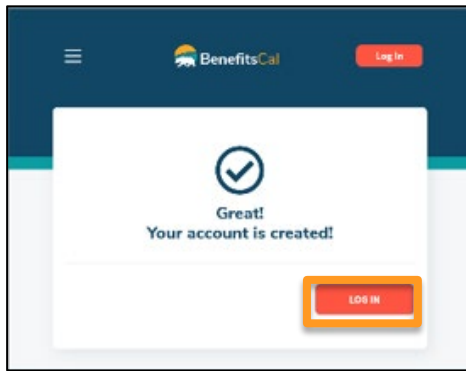
Enter the code provided via text message to confirm the mobile phone.



You may have a setting that means you cannot receive verification codes via text. If this is the case, you should remove the mobile number and proceed with account setup.

Click the **SUBMIT** button.

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Account Created

Once the verification code(s) are entered correctly, the BenefitsCal account is created, and you are ready to log in.

Next, log in to BenefitsCal with your new credentials.