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.

**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:

New User Login

Click the **CREATE ACCOUNT** button.
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.

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.
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 (%$#).

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.
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.