BenefitsCal | Quick Guide: Messages and Actions

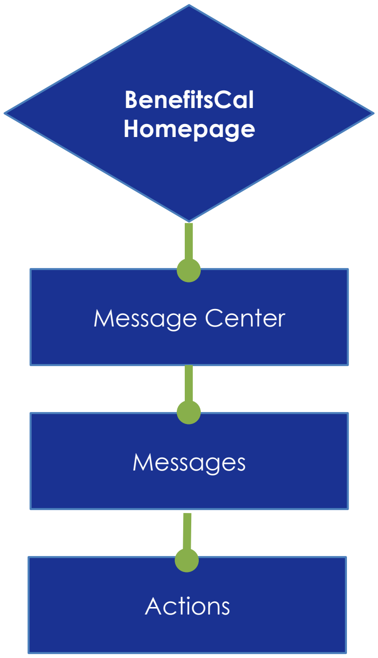
Purpose

The purpose of this BenefitsCal Quick Guide is to provide instructions to assist customers with using message and action features in BenefitsCal.

Messages allows customers to send messages to their caseworkers, and caseworkers can send messages back to customers.

Actions allows caseworkers to send a task, with instructions, to customers for them to complete through BenefitsCal.

High-Level Process Flows



FAQs

Q: What's the difference between a message and an action?

A: An action is a task the customer should complete and is initiated by the caseworker. Messages can be used to share information with a customer or for a customer to ask a question to their caseworker.

Q: How long does a caseworker have to reply to a message?

A: As stated on the screen, the caseworker will respond within five (5) business days.

Q: Can the customer reply to a message?

A: No, through the messaging feature customers can send a new question/message and read messages from their caseworker. However, if the caseworker needs a response from the customer, they will use the respond with information action type which displays in the BenefitsCal "actions" section.

Q: What do the action statuses mean?

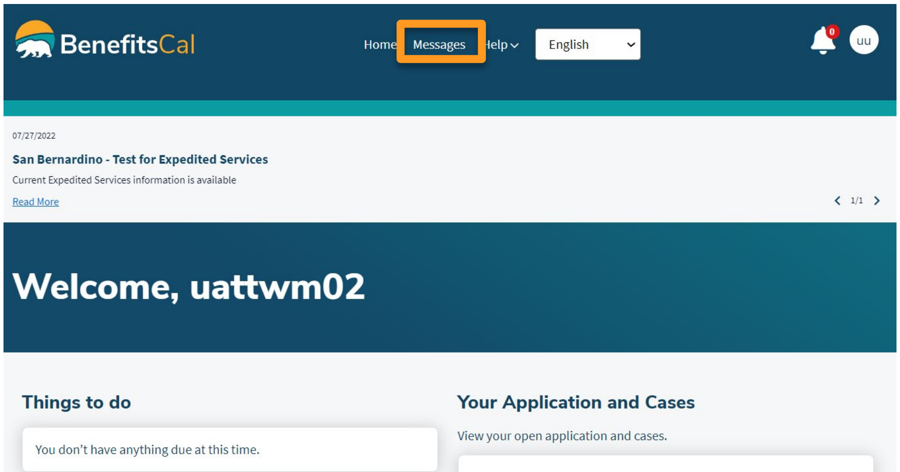
A: Action needed = incomplete action; Pending review = action completed and sent to the caseworker; and Action closed = caseworker has reviewed the action.

Q: What are the different action types?

A: Document upload, review a notice, and respond with information.

Messages and Actions

1

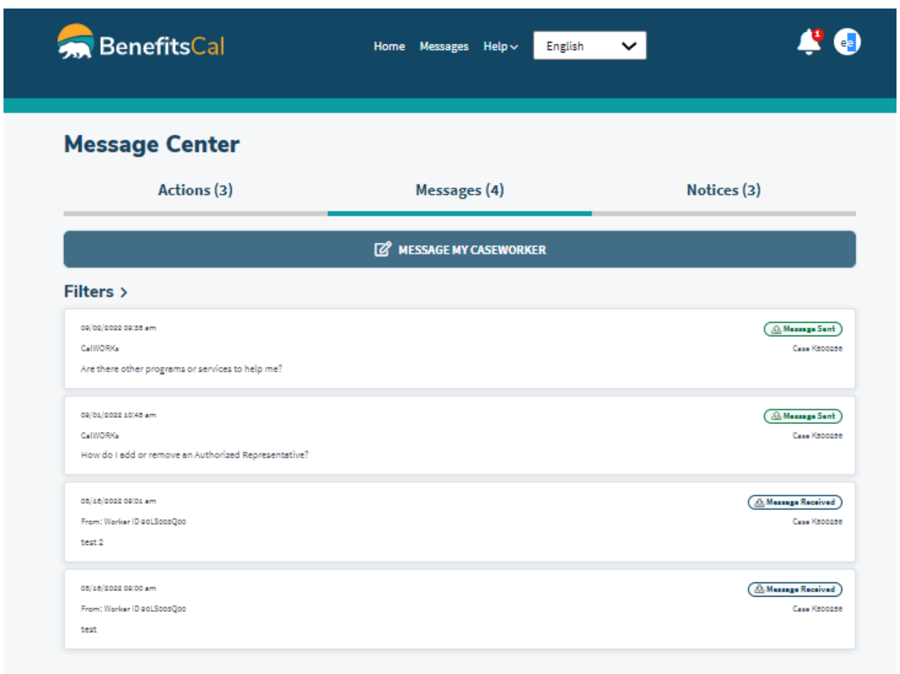


Customer Dashboard

If you have logged in to your BenefitsCal account with a linked case, you can access the Message Center.

Click the **MESSAGES** tab in the navigation bar.

2



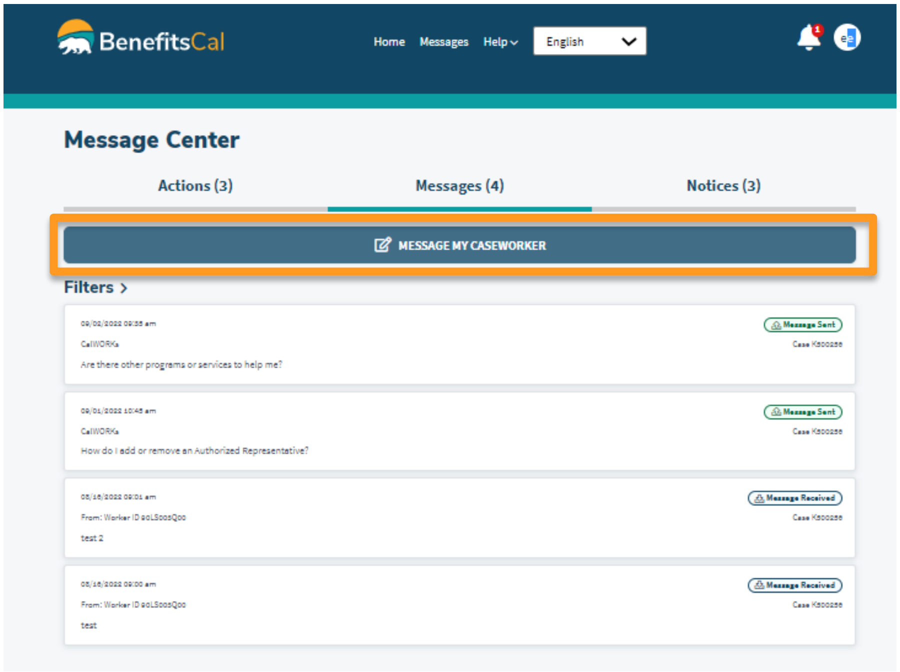
Message Center

You can find all your messages in the Message Center. Messages are divided in to three categories:

- Actions
- Messages
- Notices

3M

Messages



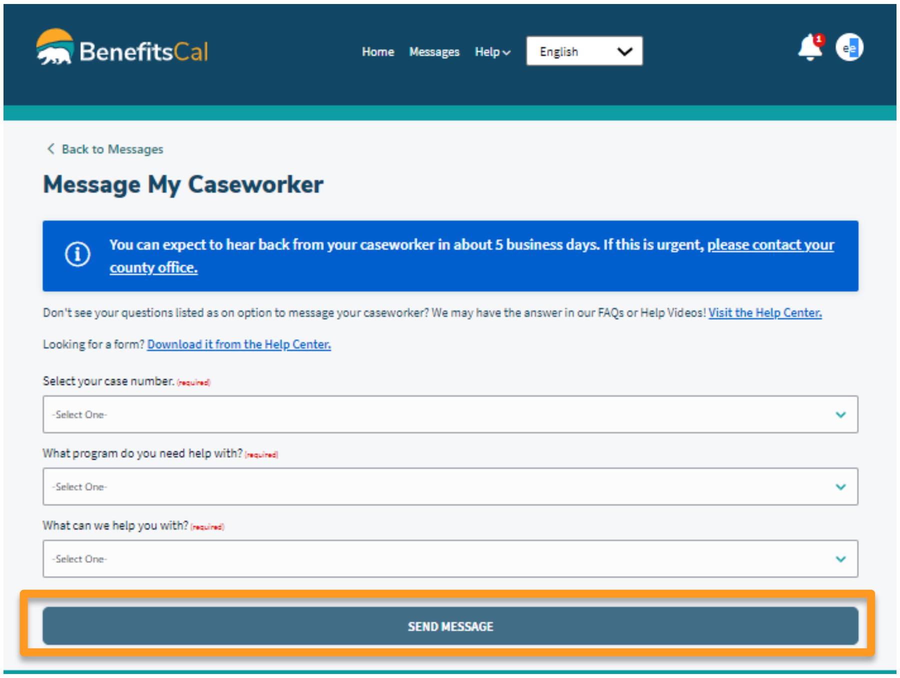
Message Center – Messages

You can view the messages you've sent to caseworkers and the messages you've received.

Click **MESSAGE MY CASEWORKER** to compose a message.

4M

Messages



Message My Caseworker

When using the messaging feature, you can expect to hear back from your caseworker in about five (5) business days.

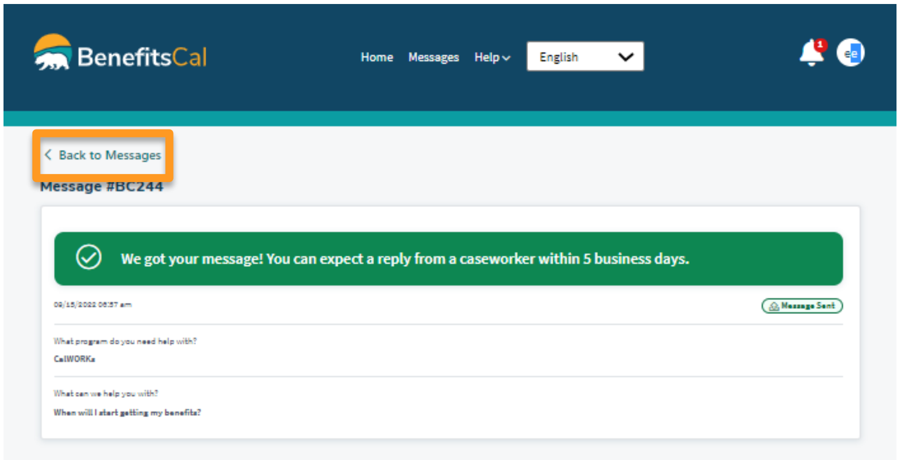
To send a message:

1. Select the case number – a drop list will appear with case number(s) to choose from.
2. Select the relevant program need – a drop list will appear with programs to choose from.
3. Select a pre-defined question from the drop list. Or select "other" – a box will appear to write in a question.

Click the **SEND MESSAGE** button.

4M

Messages



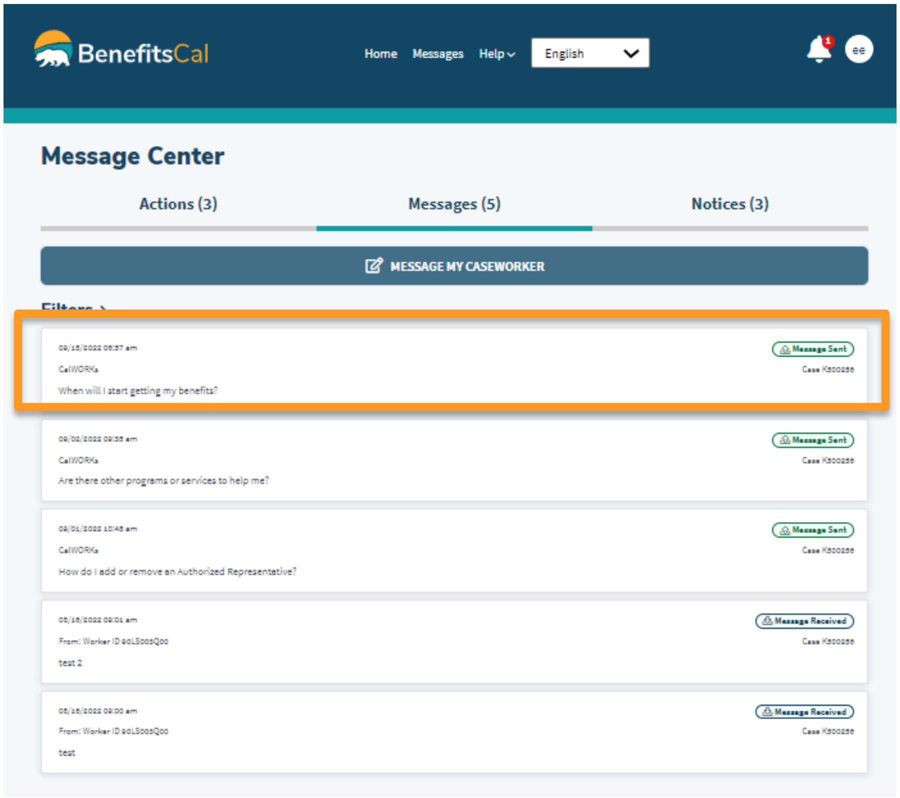
We got your message!

A green box will appear with a confirmation that the message has been sent.

Click the **BACK TO MESSAGES** button.

5M

Messages



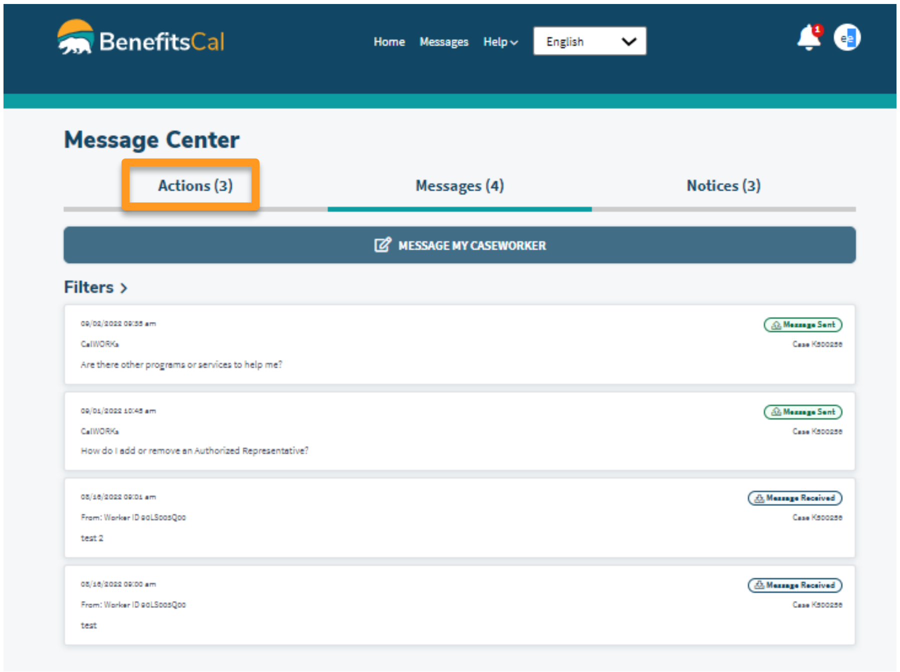
Message Center – Messages

The sent message will now appear at the top of the messages. When a caseworker responds, a new box will appear at the top, labeled "Message Received."

You can filter your messages by date, case, read, unread, and sent/received.

3A

Actions



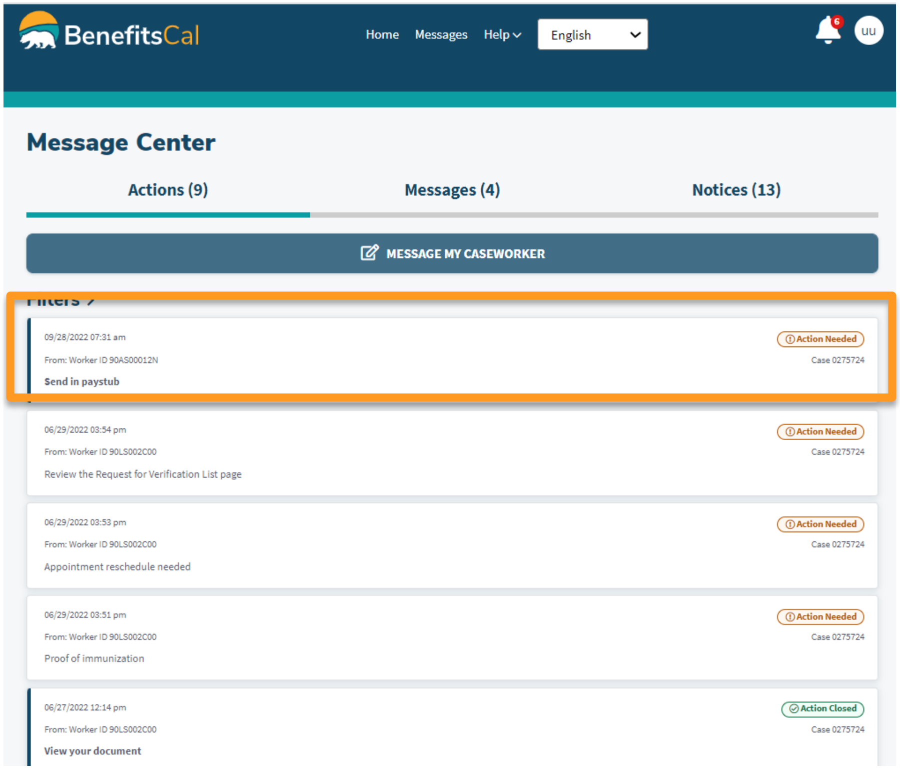
Message Center – Actions

From the Message Center, you can navigate to the Actions tab to view tasks that are sent to you by your caseworker.

Click **ACTIONS** to view all actions.

4A

Actions



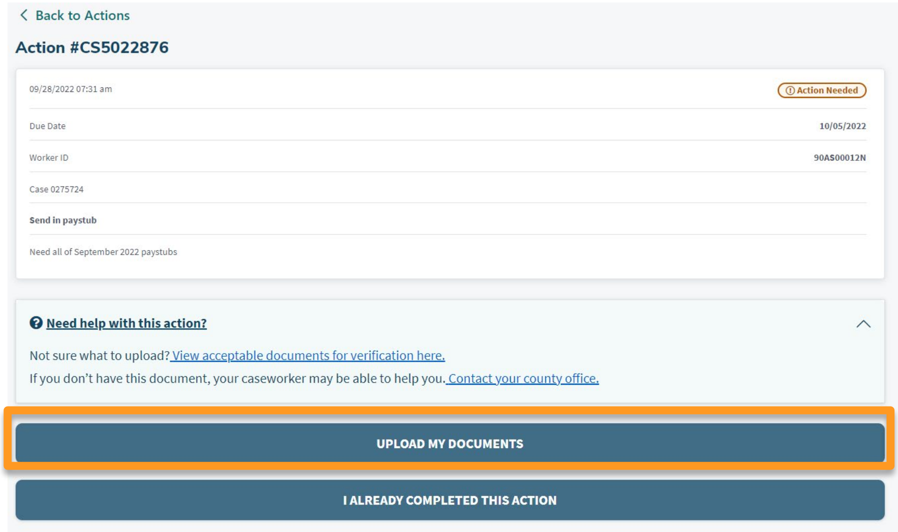
Message Center – Actions

You can view all the actions that are sent to you by your caseworker.

Click on an action with the status **ACTION NEEDED** to complete an action.

5A

Actions



Complete Action

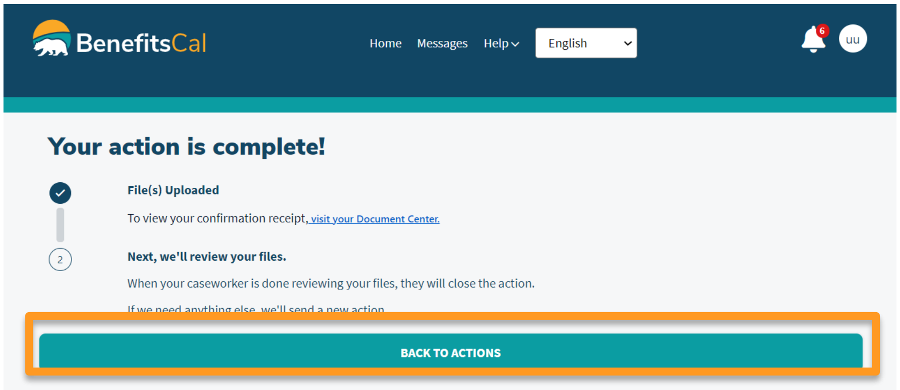
The caseworker will choose one of three (3) action types to send the customer, this will change the button labels. The action will include a subject line and instructions for what is needed.

You can either select to complete the action or indicate you have already completed the action.

Click on **UPLOAD MY DOCUMENTS** to complete this action.

6A

Actions



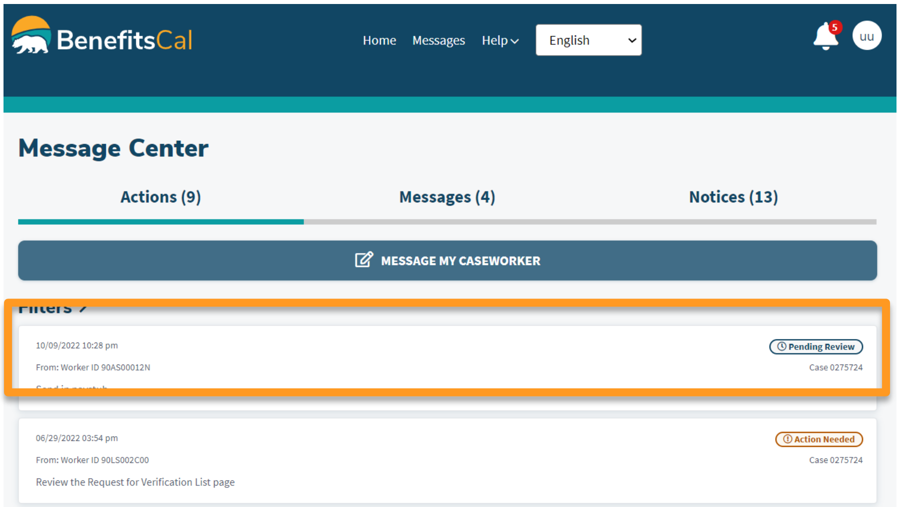
Completed Action

You should follow the flow based on the specific action type you received from your caseworker.

Once the action is completed, you'll see a confirmation and what to expect next.

Click on **BACK TO ACTIONS** to view all Action.

Actions



Message Center – Actions

The completed action will now appear with the status "pending review." When a caseworker reviews the action, they will change it to "action closed" – if further action is required the caseworker will send a new action.

You can filter your messages by date, case, read, unread, and sent/received.