

BenefitsCal | Quick Guide: Messages and Actions

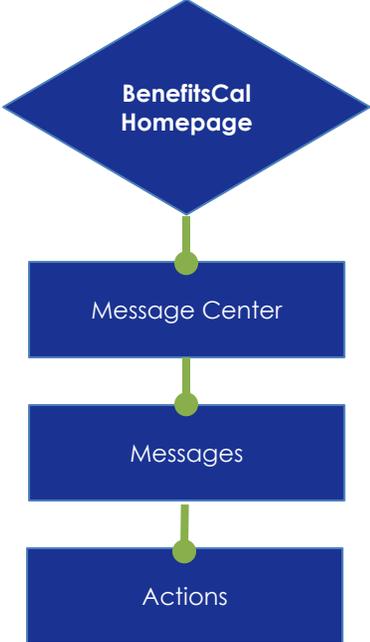
Purpose

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?

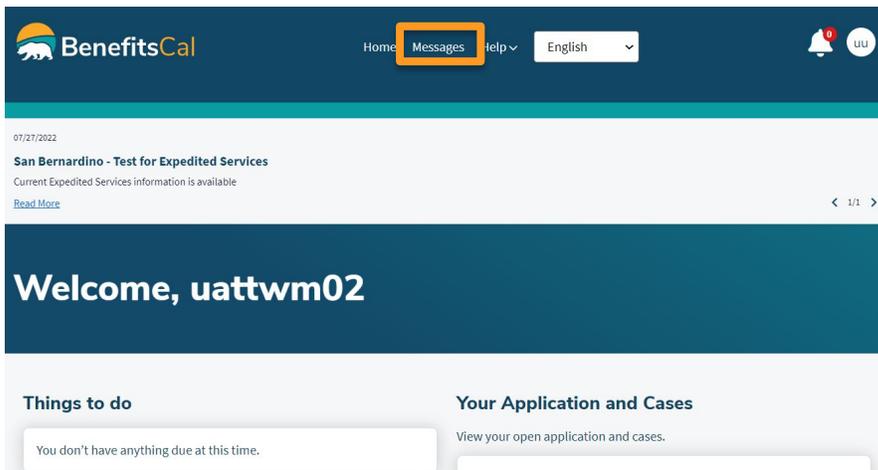
A: Action needed = incomplete action; Pending review = action completed and sent to the caseworker; and Action closed = caseworker has reviewed the action.

Q: What are the different action types?

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

Messages and Actions

1



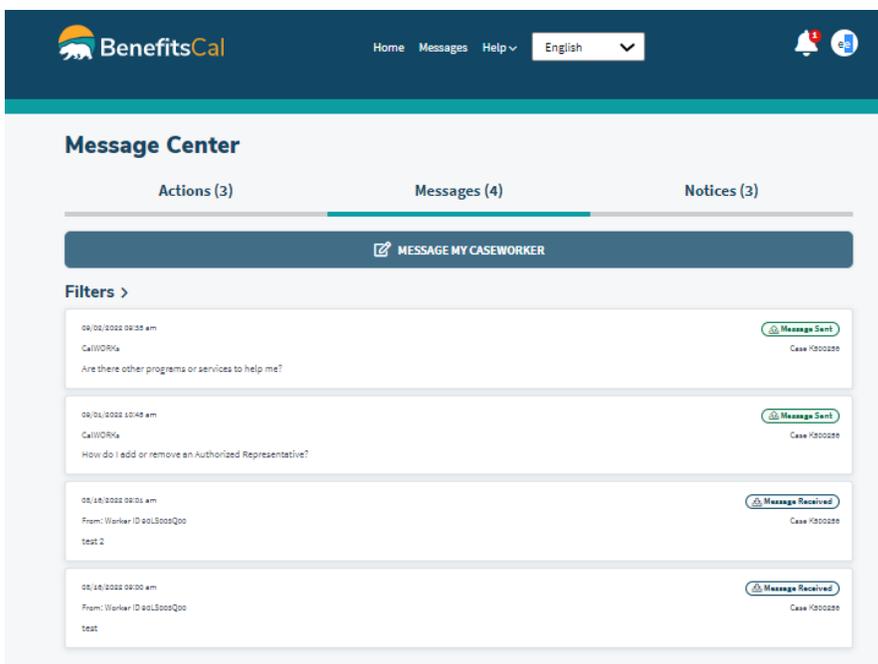
The screenshot shows the BenefitsCal homepage. At the top, there is a navigation bar with the following items: Home, Messages (highlighted with an orange box), Help, and English. To the right of the navigation bar are a notification bell icon with a red '1' and a user profile icon labeled 'UU'. Below the navigation bar, there is a header section with the date '07/27/2022' and a message: 'San Bernardino - Test for Expedited Services' with a sub-message 'Current Expedited Services information is available' and a 'Read More' link. Below this is a large teal banner with the text 'Welcome, uattwm02'. At the bottom, there are two sections: 'Things to do' with the text 'You don't have anything due at this time.' and 'Your Application and Cases' with the text 'View your open application and cases.'

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



The screenshot shows the BenefitsCal Message Center interface. At the top, there is a navigation bar with the following items: Home, Messages, Help, and English. To the right of the navigation bar are a notification bell icon with a red '1' and a user profile icon labeled 'UU'. Below the navigation bar, there is a header section with the text 'Message Center'. Below this, there are three tabs: 'Actions (3)', 'Messages (4)' (selected), and 'Notices (3)'. Below the tabs, there is a button labeled 'MESSAGE MY CASEWORKER'. Below the button, there is a 'Filters >' section. Below the filters, there are four message cards. The first two cards are 'Message Sent' and the last two are 'Message Received'. Each card contains a timestamp, a subject line, and a case number.

Timestamp	Subject	Case Number	Status
09/09/2022 09:35 am	CallWORKs Are there other programs or services to help me?	Case #000226	Message Sent
09/09/2022 10:45 am	CallWORKs How do I add or remove an Authorized Representative?	Case #000226	Message Sent
09/14/2022 09:01 am	From: Worker ID 00LS00Q00 test 2	Case #000226	Message Received
09/14/2022 09:00 am	From: Worker ID 00LS00Q00 test	Case #000226	Message Received

Message Center

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

- Actions
- Messages
- Notices

3M

Messages

BenefitsCal Home Messages Help English

Message Center

Actions (3) Messages (4) Notices (3)

[MESSAGE MY CASEWORKER](#)

Filters >

- 09/04/2022 09:35 am
CallWORKs
Are there other programs or services to help me?
Message Sent Case #000228
- 09/04/2022 10:45 am
CallWORKs
How do I add or remove an Authorized Representative?
Message Sent Case #000228
- 05/18/2022 09:01 am
From: Worker ID 9015009Q00
test 2
Message Received Case #000228
- 05/18/2022 09:00 am
From: Worker ID 9015009Q00
test
Message Received Case #000228

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.

BenefitsCal Home Messages Help English

< Back to Messages

Message My Caseworker

i You can expect to hear back from your caseworker in about 5 business days. If this is urgent, [please contact your county office.](#)

Don't see your questions listed as an option to message your caseworker? We may have the answer in our FAQs or Help Videos! [Visit the Help Center.](#)

Looking for a form? [Download it from the Help Center.](#)

Select your case number. (required)

-Select One-

What program do you need help with? (required)

-Select One-

What can we help you with? (required)

-Select One-

SEND MESSAGE

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

The screenshot shows the BenefitsCal interface. At the top, there are navigation links for Home, Messages, and Help, along with a language dropdown set to English. A notification bell icon shows 1 message. Below the navigation bar, a button labeled '< Back to Messages' is highlighted with an orange box. Underneath, the message ID 'Message #BC244' is displayed. A large green box with a checkmark contains the text: 'We got your message! You can expect a reply from a caseworker within 5 business days.' Below this, the message content is visible, including the question 'What program do you need help with?' and the user's response 'CallWORKa'.

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

The screenshot shows the BenefitsCal Message Center. The navigation bar is the same as in the previous screenshot. Below it, the 'Message Center' header is visible, with tabs for 'Actions (3)', 'Messages (5)', and 'Notices (3)'. The 'Messages (5)' tab is selected. A button labeled 'MESSAGE MY CASEWORKER' is present. Below this, a list of messages is shown. The first message is highlighted with an orange box. It has a timestamp of '08/16/2022 08:57 am', the subject 'CallWORKa', and the content 'When will I start getting my benefits?'. To the right of the message is a 'Message Sent' status icon and the case number 'Case #1000250'. Other messages in the list include questions about other programs and adding/removing authorized representatives.

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

The screenshot shows the BenefitsCal Message Center interface. At the top, there is a navigation bar with the logo, 'Home Messages Help', and a language dropdown set to 'English'. Below the navigation bar, the 'Message Center' title is followed by three tabs: 'Actions (3)', 'Messages (4)', and 'Notices (3)'. The 'Actions (3)' tab is highlighted with an orange border. Below the tabs is a 'MESSAGE MY CASEWORKER' button. A 'Filters >' section is visible, followed by a list of messages. The first message is highlighted with an orange box and contains the text: '09/04/2022 09:05 am', 'CallWORKs', and 'Are there other programs or services to help me?'. To the right of this message is a 'Message Sent' status indicator.

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

The screenshot shows the BenefitsCal Message Center interface. At the top, there is a navigation bar with the logo, 'Home Messages Help', and a language dropdown set to 'English'. Below the navigation bar, the 'Message Center' title is followed by three tabs: 'Actions (9)', 'Messages (4)', and 'Notices (13)'. The 'Actions (9)' tab is highlighted with a blue bar. Below the tabs is a 'MESSAGE MY CASEWORKER' button. A 'Filters >' section is visible, followed by a list of actions. The first action is highlighted with an orange box and contains the text: '09/28/2022 07:31 am', 'From: Worker ID 90A500012N', and 'Send in paystub'. To the right of this action is an 'Action Needed' status indicator.

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

< Back to Actions

Action #CS5022876

09/28/2022 07:31 am Action Needed

Due Date 10/05/2022

Worker ID 90AS00012N

Case 0275724

Send in paystub

Need all of September 2022 paystubs

Need help with this action?

Not sure what to upload? [View acceptable documents for verification here.](#)
If you don't have this document, your caseworker may be able to help you. [Contact your county office.](#)

UPLOAD MY DOCUMENTS

I ALREADY COMPLETED THIS ACTION

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

BenefitsCal Home Messages Help English

Your action is complete!

1 **File(s) Uploaded**
To view your confirmation receipt, [visit your Document Center.](#)

2 **Next, we'll review your files.**
When your caseworker is done reviewing your files, they will close the action.
If we need anything else, we'll send a new action.

BACK TO 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.

7A

Actions

BenefitsCal Home Messages Help English

Message Center

Actions (9) Messages (4) Notices (13)

MESSAGE MY CASEWORKER

Filters

10/09/2022 10:28 pm From: Worker ID 90AS00012N Case 0275724 **Pending Review**

06/29/2022 03:54 pm From: Worker ID 90LS002C00 Case 0275724 **Action Needed**

Review the Request for Verification List page

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.