CalSAWS | Information Transmittal (CIT)   0049-24

☒ **CalSAWS M&E**   ☐ **CalWIN Migration**

Distribution Date:	April 2, 2024
To:	PPOC.all, Committee.SelfServicePortal.all, Consortium.RegionalManagers.all
CIT Name:	**BenefitsCal CBO Accounts and County Delegated Admin**
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

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Description:	**Purpose** The purpose of this CIT is to provide CalSAWS Counties with information on Community Based Organization (CBO) accounts and the role of the County Delegated Admin. **Background** BenefitsCal allows access for CBOs to submit applications on behalf of a customer requesting benefits. CBOs can submit and track applications through BenefitsCal. To request access, CBOs must submit a request through BenefitsCal, by clicking the *Register Your CBO Account* button, and complete all required fields. The request is then sent to the County for review and processing. If the County approves the request, it is sent to the County Delegated Admin to create the CBO account in ForgeRock. Next, the CBO will receive an email inviting them to complete their registration for BenefitsCal.

For additional resources visit *CalSAWS.org/BenefitsCal > Quick Reference Guides > Community Based Organization Request Access*

Note: Each new CBO request requires at least one manager role.

Using the CBO Dashboard, CBO Managers can:

- Manage staff by adding new CBO assistor accounts by clicking the *Manage Staff* button under Staff Management. This will create a CBO Assistors account for the CBO. Managers can also use Manage Staff to update statuses from active to inactive.
- Monitor staff by tracking applications submitted using the *View Staff Applications* button under Staff Applications.

Note: In some cases, the CBO Manager may not have access to add an assistor, the CBO must contact the County to confirm the CBO Manager role has been assigned to the correct user role in ForgeRock. In this instance, the County Delegated Admin can also create Assister accounts for the CBO.

Additional Information
CBO Managers and CBO Assistors have many features in common. See table below to identify which features are available for CBO Managers and Assistors/Staff.

Feature	Manager	Staff
Login	X	X
Apply for Benefits	X	X
Upload Documents	X	X
View Reports on their customer applications	X	X
Export Reports to Excel	X	X
View all applications for their staff	X	
Resume an application on behalf of their staff	X	
Add/Remove staff within their organization	X	
Create Referral Campaigns	X	
View and track referral campaigns	X	X

CBO staff must contact the county to change the CBO manager accounts. County staff will confirm the information and send the request to the Delegated Admin to add a new manger or edit existing assister to a manager role in ForgeRock.

Note: BenefitsCal Admin Role does not grant access to manage or update CBO information and has been removed from all County Staff. This does not affect CBO account management in ForgeRock. Counties have access to update all CBO account information from the Delegated Admin role.

County Action

	County Staff
	1. County staff must review (approve or deny) new requests from CBOs to be added based on County process.
	     a. Approve requests based on county process and send to Delegated Admin to enter new CBO into ForgeRock.
	     b. Deny request based on county process and reply to CBO with reason for denial.
	2. Confirm County Delegated Admin has created approved CBO accounts.
	
	County Delegated Admin
	1. County Delegated Admin receives approved CBO account requests to add to ForgeRock.
	2. Create new CBO in ForgeRock with information provided by CBO.
	Note: If additional information is needed, contact the CBO to gather.
	3. Create CBO Manager account in ForgeRock for the CBO.
	4. Notify CBO that CBO account and CBO manager account have been created.
	5. Notify County staff reviewing CBO request that CBO account has been created.
	
	Note: Staff reviewing CBO request and Delegated Admin may be same staff. This is based on separated duties for County action.
	
	If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.

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Backup Project Contact:	Pete Quijada QuijadaP@CalSAWS.org
Attachments:	
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