



Community Based Organization (CBO) Dashboard

BenefitsCal

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This Quick Reference Guide provides an overview of key features and functions available to CBO Assisters and Managers within the BenefitsCal system.

It also includes guidance on the following areas:

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[CBO Assister - My Reports](#)

[CBO Assister - Referral Campaigns](#)

[CBO Assister - Help & Resources](#)

[CBO Manager - Dashboard](#)

[CBO Manager - Applications](#)

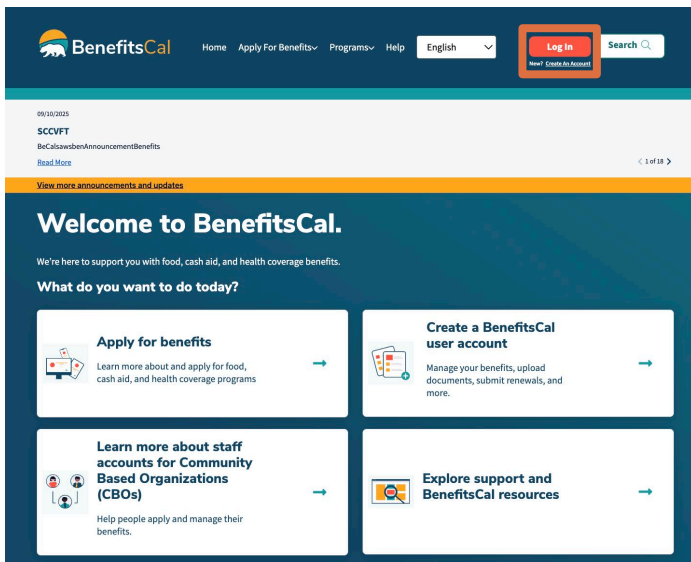
[CBO Manager - My Reports](#)

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Assister

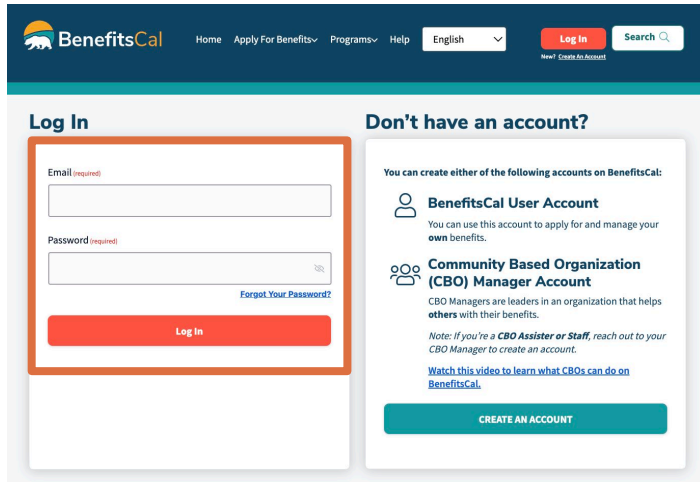
Step 1 – Welcome to BenefitsCal – Homepage



Click the **Log in** button to login to your Assister account.

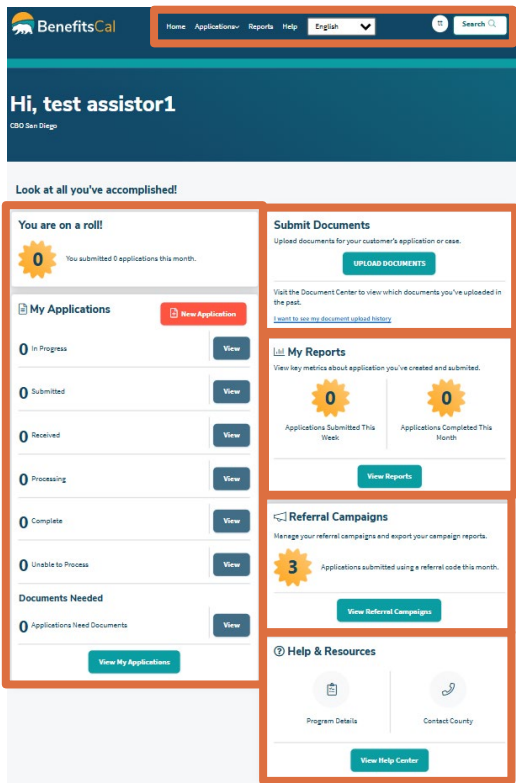


Step 2 – BenefitsCal > Login



Log in to BenefitsCal using your **Email** and **Password**.

Step 3 – CBO Assister Dashboard



The BenefitsCal Assister dashboard displays six (6) unique areas on the screen.

User Menu – can be accessed at the top of each screen.

My Applications – allows the Assister to start a new application and see how many applications are in-progress, submitted, received, processing, complete and unable to process.

Submit Documents – allows the Assister to upload documents to a customer's application or case, as well as view their upload history.

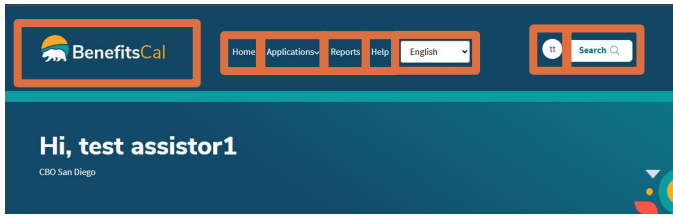
My Reports – shows the Assisters metrics about applications they have created and submitted.

Referral Campaigns – shows the Assister details on their referral campaign(s) and metrics on how many customers have applied for benefits using their referral campaign link.

Help & Resources – provides access to FAQs, program rules and information, and allows the user to contact the County.



Step 4 – CBO > Dashboard > User Menu



The customer can find several resources on the User Menu.

BenefitsCal logo – returns the user back to the dashboard from any page.

Home – same functionality as BenefitsCal logo.

Applications – provides access to create a new application or view current user applications.

Reports – provides access to reports for each status.

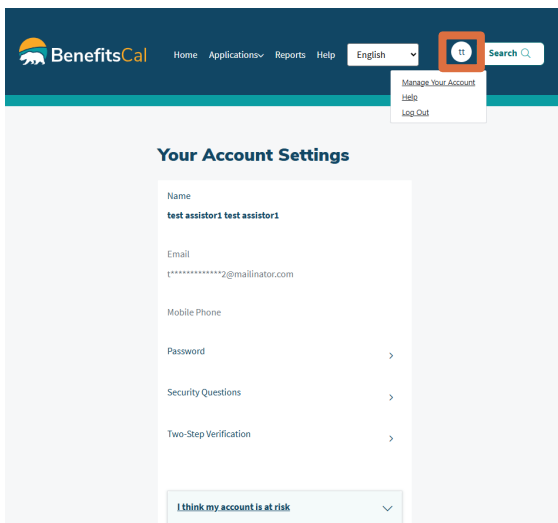
Help – provides access to blank forms (Periodic Reports, Renewals, etc.), find an office near their location, and view FAQs.


Language – displays the language selected from the drop list.

User Initials – provides access to Account Settings, Help and Resources and log out.

Search – allows to search through BenefitsCal resources.

Step 5 – Dashboard > Manage Your Account

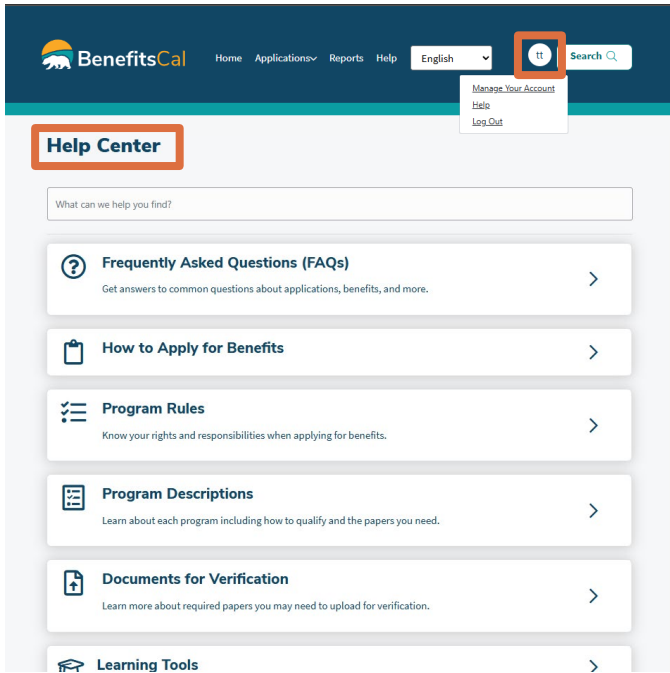


Click on the  icon. The Manage Your Account option navigates to a new tab where users can make changes to their account settings: Change password, updating their security questions, and manage two-step verification.

Review the QG "Two-Step Verification" for instructions for setting up two-step verification.



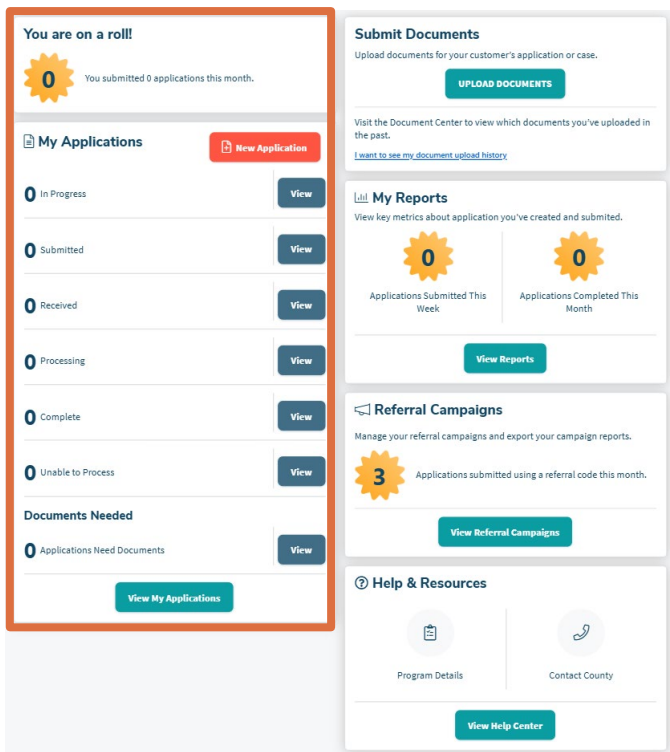
Step 6 – CBO > Dashboard > Help



Under the **Help Center** section, the customer can find blank forms (Periodic Reports), find an office near their location, and view FAQs.

Below **Help** in the drop list is the **Log Out** button.

Step 7 – CBO > Dashboard



Applications:

The “My Applications” section includes a high-level view of applications statuses.

In Progress displays how many applications are in progress and not yet ready to submit.

Submitted displays how many applications have been sent over to CalSAWS.

Received displays the number of applications that have been received by the county.

Processing displays the number of applications the county is currently processing from the CBO account.

Complete displays the number of complete applications from the CBO account.

Unable to Process displays the number of applications the county is unable to process from the CBO account.

Documents Needed displays the number of applications with documents to upload.

Click the **View** button next to the status to see applications in the selected status.



Step 8 – CBO Assister Dashboard > Applications

< Back to Dashboard

Applications

Let's review your applications.

Type the applicant name, or the application number/status to filter the results.

Filter [Filter](#)

[IN PROGRESS](#)
[SUBMITTED](#)
[RECEIVED](#)
[PROCESSING](#)
[COMPLETE](#)

[UNABLE TO PROCESS](#)
[DOCUMENTS NEEDED](#)

Results (2)

<p>Application Number 78003860</p> <p>View Details</p> <p>Last Name Jose</p> <p>First Name Jerry</p> <p>Application Status Received</p> <p>Action Items 1 Documents Needed</p>	<p>Application Number 78003872</p> <p>Continue</p> <p>Last Name test</p> <p>First Name test</p> <p>Application Status In Progress</p> <p>Start Date 08/29/2025</p> <p>Remove Application</p>
---	---

A tile displays each application the CBO created.

Each tile displays the following:

- Application Number
- Applicant Last Name and First Name
- Application Status
- Documents Needed
- Remove Application (In Progress only)

Click the **View Details** button to see information about that application.



Step 9 – CBO Assister Dashboard > Applications > Application Details

Application Details for 78003860

Application Details

First Name	Last Name
Jerry	Jose
Date of Birth	Application Date
//2000	08/29/2025
Application Status	Case Number
Received	Not Assigned

Verification Requests

Upload Needed

Application Date 0 Days Ago

✔ **Proof of Identity**
 Jerry Jose (25)

Uploaded

ⓘ **Proof of Income**
 Jerry Jose (25)

Upload

Upload History

Below are the receipts for the documents you've uploaded in the past year.

Proof of Identity	Jerry Jose (25)
08/28/2025	View Receipt

UPLOAD DOCUMENT

Application Details – displays application information

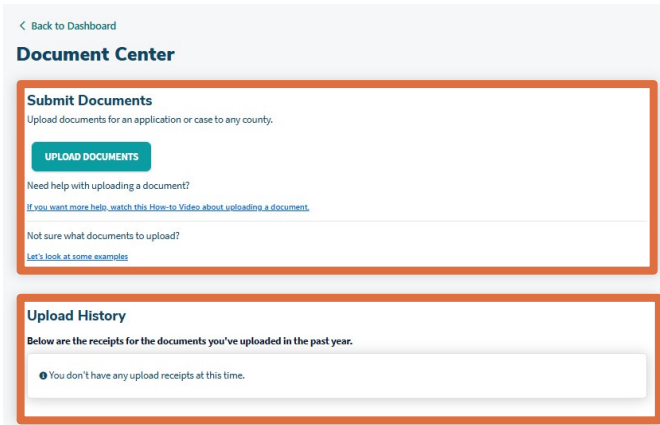
Verification Requests – displays documents needed and provides a simple way to upload documents by clicking the **Upload** button.

Upload History – displays the last 12 months of documents uploaded to an application.

Upload Document – provides a way to upload other documents.



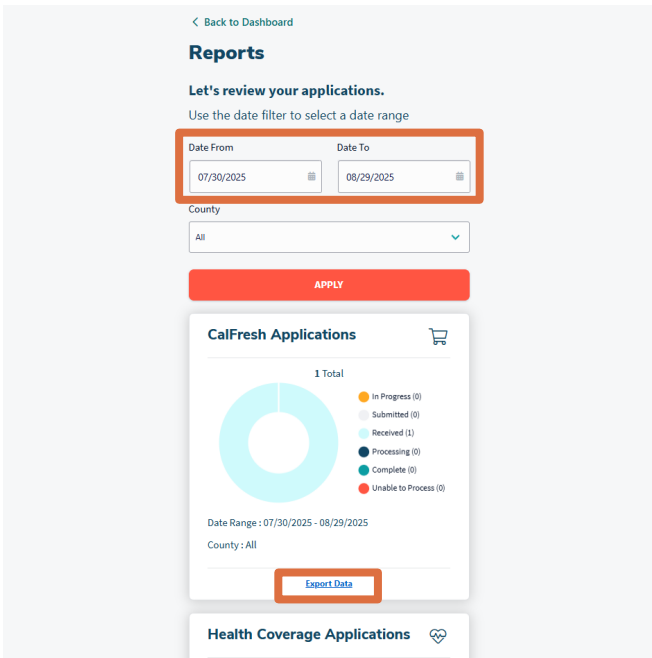
Step 10 – CBO Assister Dashboard > Submit Documents



The CBO can upload documents for customer's case or application. They can click the **Upload Documents** to enter the Document Upload flow. CBOs will need their customers application/case number and the County in order to upload documents.

The CBO can also see a history of all the documents they have upload for a customer below in the **Upload History** section.

Step 11 – CBO Assister Dashboard > Reports



The CBO can see all their applications. Choose the Report period by entering a date in the **Date From** and **Date To** fields and clicking the **Apply** button.

Each tile displays a program and the status of each application in the date range requested.

Click **Export Data** to create a report in Microsoft (MS) Excel.



Step 12 – CBO Assister Dashboard > Referral Campaign

Referral Campaigns

Manage your referral campaigns and export your campaign reports.

12 Applications submitted using a referral code this month.

[View Referral Campaigns](#)

The CBO can manage their referral campaign and export campaign reports.

Click **View Referral Campaign** to view the referral campaigns.

Step 13 – CBO Assister Dashboard > Referral Campaigns

The screenshot displays the 'Referral Campaigns' section of the BenefitsCal dashboard. At the top, there is a navigation bar with 'Home', 'Applications', 'Reports', and 'Help' menus, along with a language dropdown set to 'English' and a search bar. Below the navigation, a 'Back to Dashboard' link is visible. The main heading is 'Referral Campaigns'. A tooltip titled 'What is a Referral Campaign?' explains that it is a marketing tool for tracking outreach efforts. Below this, there is a search filter: 'Type the name of the campaign to filter the results.' with a 'Filter' input field. Underneath, there are two checkboxes: 'Active' (unchecked) and 'Archived' (unchecked), with a 'SEARCH' button. The results are shown as a list of three campaigns. Each entry includes the Campaign Name, Campaign Start Date, Campaign Status, and a 'VIEW DETAILS' button. The first campaign is 'Test08 01 2025 12 51 41 718' with a status of 'Archived'. The second is 'Test08 28 2025 14 38 27 424' with a status of 'Active'. The third is 'Test08 01 2025 07 00 28 786' with a status of 'Active'. Each entry also has links for 'Copy Referral URL' and 'Download QR Code'. A 'SHOW MORE' button is located at the bottom of the list.

The CBO can manage their referral campaign and export campaign reports.

What is a Referral Campaign?

A referral campaign is a marketing tool. It allows you to create a unique referral URL to track how many customers apply as a result of your outreach efforts. This also helps your organization to generate annual and semi-annual reports.

Filter: When user inputs text inside the text box, only campaigns that pertain to the input values will be displayed.

Campaign Status: Displayed only when the CBO Organization has referral campaigns

Active: When checked, the active campaigns will be displayed below. If the user also selects the "Archived" checkbox along with the "Active" checkbox, the search will respond with the same result set i.e. All the referrals.

Archived: When checked, the archived campaigns will be displayed below. If the user also selects the "Active" checkbox along with the "Archived" checkbox, the



search will respond with the same result set i.e. All the referrals.

Each tile displays the following:

- Campaign Name
- Campaign Start Date
- Campaign Status
- Copy Referral URL
- Download QR Code

View Details: When clicked, the user is navigated to the referral campaign details screen.

Show More: On click, display 20 more campaign cards. The "SHOW MORE" button will display until all campaigns are displayed on the page.



Step 14 – CBO Assister Dashboard > Referral Campaigns > Campaign Details > Campaign Status Selected as Active

< Back to Referral Campaigns

Referral Campaign

Test09 18 2025 07 29 36 640

Campaign Details

Campaign Status	Campaign Start Date
Active	09/17/2025
Email	
Phone Number	
Website	
Address	

Share your Referral Campaign!

Referral URL
<https://sit2-app.sit.benefitscaldev.com/rj/TYWTONI>

COPY REFERRAL URL

Referral QR Code



DOWNLOAD QR CODE

Referral Campaign Statistics

Total Unique Applications Submitted

1

Applications Submitted per Program



Legend: CalFresh (red), CALWORKs (orange), Medi-Cal (blue), GA/GR (teal)

Note: An application can include multiple programs. The count above shows the number of applications that included each program. To see all your campaign data, including applications submitted per county, select "Export Campaign Data".

EXPORT CAMPAIGN DATA

Referral campaign in "**Active**" status.

Campaign Name: Displays the Campaign Name.

Campaign Details file displays the following:

- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

Share your Referral Campaign: Only displayed for active campaigns

Referral URL: Displays the referral URL pulled from the database for the campaign

Referral QR Code: Displays the referral QR Code.

Referral Campaign Statistics: Displays the referral campaign statistics.

- Displays the unique number of applications submitted in BenefitsCal using this Campaign code.
- Number of total applications by program will be displayed by categorized bar chart outline.
- All 4 programs will be always displayed

EXPORT CAMPAIGN DATA:

Upon click, the indicated report will export the data. Sample in "Referral Campaign Data Export". A new file will be downloaded in the user's browser.



Step 15 – CBO Assister Dashboard > Referral Campaigns > Campaign Details > Campaign Status Selected as Archived

< Back to Referral Campaigns

Referral Campaign

Test08 01 2025 12 51 41 718

Campaign Details

Campaign Status Archived	Campaign Start Date 07/31/2025
Email	
Phone Number	
Website	
Address	
Campaign Archived Date 09/15/2025	

Referral Campaign Statistics

Total Unique Applications Submitted
1

Applications Submitted per Program

Program	Applications Submitted
CalFresh	0
CALWORKs	1
Medi-Cal	0
GA/GR	0

Note: An application can include multiple programs. The count above shows the number of applications that included each program.
To see all your campaign data, including applications submitted per county, select "Export Campaign Data".

[EXPORT CAMPAIGN DATA](#)

Referral campaign in "**Archived**" status.

Campaign Name: Displays the Campaign Name.

Campaign Details file displays the following:

- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

Referral Campaign Statistics: Displays the referral campaign statistics.

- Displays the unique number of applications submitted in BenefitsCal using this Campaign code.
- Number of total applications by program will be displayed by categorized bar chart outline.
- All 4 programs will be always displayed

EXPORT CAMPAIGN DATA:

Upon click, the indicated report will export the data. Sample in "Referral Campaign Data Export". A new file will be downloaded in the user's browser.



Step 16 – CBO Dashboard > Help Center > Program Details

Program Descriptions

- CalFresh (Food)**
Add to your food budget and get help putting healthy food on the table with the CalFresh Program.
- Disaster CalFresh**
Helps with the food needs of people within a 30-day period after a flood, fire, earthquake, or other natural disaster.
- Medi-Cal (Health Coverage)**
Medi-Cal is free or low-cost health insurance for individuals or families. It includes help paying for private health care, such as premium assistance via a federal tax credit.
- County Medical Services Program (CMSP)**
Temporary health coverage for uninsured low-income adults that are not eligible for other health care programs, who live in a CMSP County. If you apply for Medi-Cal, the county will check to see if you qualify. [View participating counties](#)
- CalWORKs (Cash Aid)**
Helps with cash to pay for rent, housing, food, clothing, and utilities for families with at least one child or a pregnancy in the home.
- General Assistance or General Relief (GA/GR)**
Cash assistance for adults in need without children in the household who are not able to support themselves by their own means, other public funds, or assistance programs. Some counties may consider this a repayable loan, please [contact your county representatives](#) for more information.
- General Relief Opportunities for Work (GROW)**
Provides work and training to help employable General Relief (GR) customers get jobs for individuals who live in Los Angeles County.
- Refugee Cash Assistance (RCA)**
A cash aid program for immigrant groups that aren't eligible for other cash aid programs. This includes refugees. This also includes people who are seeking or have been granted asylum.
- Trafficking and Crime Victims Assistance Program (TCVAP)**
A cash aid and social services program for those who aren't citizens and are victims of crime in need of immediate support. You may qualify if one of these applies to you:
 - You plan to get a nonimmigrant T-Visa.
 - You have applied for a nonimmigrant U-Visa.
 - You can show that you have "Continued Presence" from law enforcement.
- Welfare-to-Work (WtW)**
If you receive CalWORKs and can work, you must take part in Welfare-to-Work activities to continue to receive cash aid. Welfare-to-Work is the Employment Program of the California Work Opportunity and Responsibility to Kids Program (CalWORKs).
- Cash Assistance Program for Immigrants (CAPI)**
Cash aid to elderly, blind, and disabled people who are legally in the country. Recipients must not be able to get Supplemental Security Income/State Supplemental Payment (SSI/SSP) due to immigration status.

Ready to apply or have more questions?

[APPLY NOW](#) [Ask Robin](#)

Program Descriptions display each program available with a brief description. Click on a program tile to view details about the program. At the bottom of the page **Apply Now** or **Ask Robin** buttons are available.

Step 17 – Help Center > Contact County

BenefitsCal | Home | Apply For Benefits | Program | Help | English | Log In | Search

< Back to Help Center

Request a Call Back

Can't call now? Some counties offer the option to request a call back during business hours.

Select Your County

Alpine

Great! Select the button below to share your details and request a call back.

[REQUEST A CALL BACK](#)

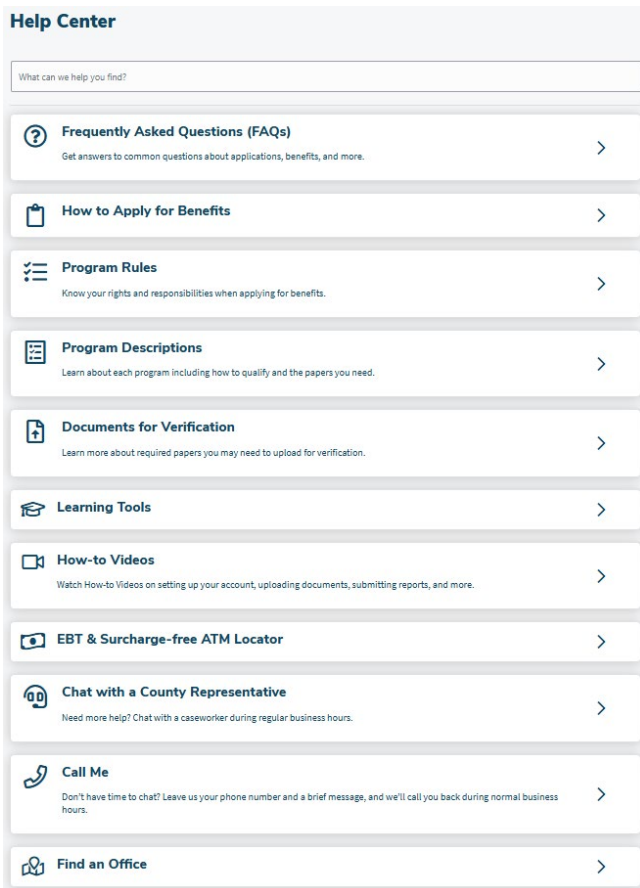
Request a Call Back. Allows you to leave a message for the County to call you back during regular business hours.

This feature is a **customer-initiated process**. While CBOs cannot use it on behalf of the customer, they can assist by informing customers about the option. **This feature is only available in counties where it is enabled.**

When the new tab opens, click on the **Select Your County** drop list and find your county. Click on the **REQUEST A CALL BACK** button and enter your **First Name**, **Last Name**, and **Phone Number** and click the **Submit** button.



Step 18 – Welcome to BenefitsCal – Help Center



From the bottom of the Customer Dashboard, select the Take me to the help center hyperlink for help content. Alternatively, from the User Menu, select Help and Resources.

The Help Center has several resources to assist. Select any tile to open for detailed information.



Training videos are also available on YouTube within the BenefitsCal channel for easy access.

Assister FAQs

Q: Can I create a CBO Assister account by myself, or do I need my Manager's help?

A: CBO Assisters cannot create accounts for themselves, they must be created by a CBO Manager.

Q: If I have an Assister account and I become a Manager, can I update my current account or do I need to fill out an whole new Manager account??

A: The type of account you have cannot be changed. You will need to request a CBO Manager account.

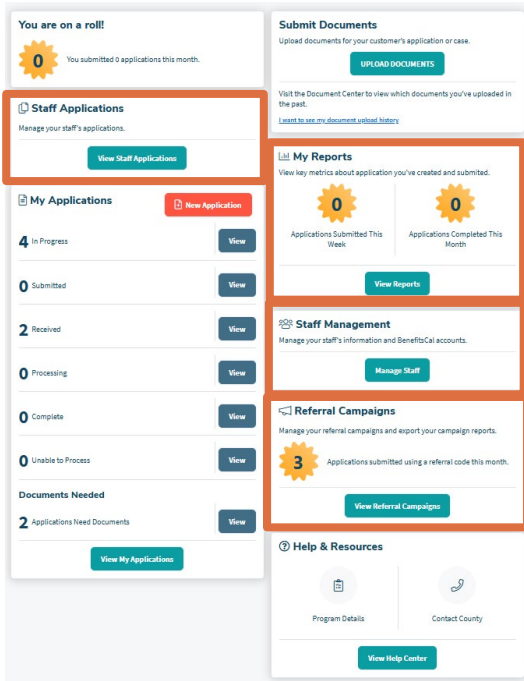
Q: When I try to log in, I see a message telling me my account is inactive. What should I do to re-activate my account?

A: CBO Assisters can contact their Manager to re-activate their account.



Manager

Step 19 – Manager Dashboard



The CBO Manager has the same access as an Assister. However, a CBO Manager also has access to the following:

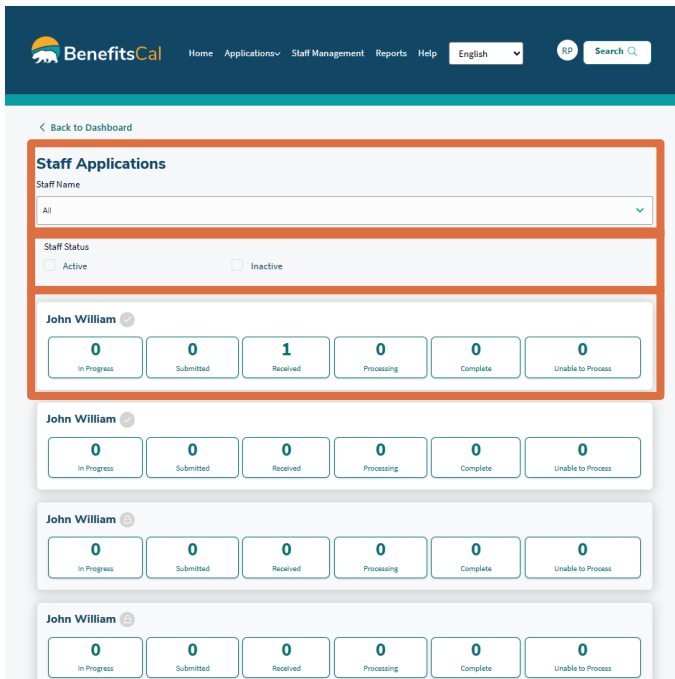
View Staff Applications – shows all staff members' applications.

My Reports – shows the Manager metrics about applications they and their staff have created and submitted.

Staff Management – allows the Manager to mark an Assister as inactive or add new Assistors.

Referral Campaigns – allows the Manager to create a referral campaign, add organization details, and generate a link and QR code for distribution.

Step 20 – Manager Dashboard > View Staff Applications



Managers can choose to look at all Staff Applications or individual applications by clicking the **Staff Name** drop list and selecting staff members.

When Staff Status is displayed, the Manager can select Active or Inactive.

Click the tile to see the applications in the status selected.

Managers can also complete applications for staff.



Step 21 – Manager Dashboard > Reports

Reports

Let's review your reports.

Use the date filter to select a date range or select the name of a staff member

Date From: Date To:

Staff Name:

County:

APPLY

CalFresh Applications 🛒

6 Total

- In Progress (0)
- Submitted (0)
- Received (6)
- Processing (0)
- Complete (0)
- Unable to Process (0)

Date Range : 07/30/2025 - 08/29/2025
 Assister : All Staff
 County : All

[Export Data](#)

Health Coverage Applications ❤️

3 Total

- In Progress (0)
- Submitted (0)
- Received (3)
- Processing (0)
- Complete (0)
- Unable to Process (0)

Date Range : 07/30/2025 - 08/29/2025
 Assister : All Staff
 County : All

[Export Data](#)

The Manager can see all the applications that their staff members submit.

Choose the report period by entering **Date From** and **Date To**.

Click a staff member or 'all' from the **Staff Name** drop list.

Click a county name or 'all' from the **County** drop list.

To see the Report, click the **Apply** button.

Each graph displays the application status for each program in the date range requested.

Click **Export Data** to create a report in MS Excel.



Step 22 – CBO Manager Dashboard > Referral Campaign

Referral Campaigns

Manage your referral campaigns and export your campaign reports.

12 Applications submitted using a referral code this month.

[View Referral Campaigns](#)

The CBO Manager can manage their referral campaign and export campaign reports.

Click **View Referral Campaign** to view the referral campaigns.

Step 23 – CBO Manager Dashboard > Referral Campaigns > Campaigns

The CBO Manager can manage their referral campaign, generate and export campaign reports.

Campaigns: When selected, the user is navigated to the referral campaign screen.

Reports: When selected, the user is navigated to generate a report screen.

Create New Referral Campaign: Upon click, user will navigate to Create New Referral Campaign page, where they will be able to create their referral campaigns.

What is a Referral Campaign?

On click, collapse or expand the inline help.

Filter: When user inputs text inside the text box, only campaigns that pertain to the input values will be displayed.

Campaign Status: Displayed only when the CBO Organization has referral campaigns.



Active: When checked, the active campaigns will be displayed below. If the user also selects the "Archived" checkbox along with the "Active" checkbox, the search will respond with the same result set i.e. All the referrals.

Archived: When checked, the archived campaigns will be displayed below. If the user also selects the "Active" checkbox along with the "Archived" checkbox, the search will respond with the same result set i.e. All the referrals.

Each campaign tile displays the following:

- Campaign Name
- Campaign Start Date
- Campaign Status
- Copy Referral URL
- Download QR Code

View Details: When clicked, the user is navigated to the referral campaign details screen.

Show More: On click, display 20 more campaign cards. The "SHOW MORE" button will display until all campaigns are displayed on the page.



Step 24 – CBO Manager Dashboard > Referral Campaigns > Create New Referral Campaign

BenefitsCal Home Applications Staff Management Reports Help English RP Search

< Back to Referral Campaigns

Create New Referral Campaign

Campaign Name (required)

 This is the title of your referral campaign.

Campaign Start Date (required)

 This is the date we will start tracking applications submitted via this referral campaign.

Custom Referral Code (required)

 This will be used to generate your referral URL.

The CBO Manager can create new Referral Campaigns by completing the required fields (**Campaign Name**, **Campaign start date**, **Custom Referral code**) in the Create New Referral Campaign section and clicking the **CREATE REFERRAL CAMPAIGN** button.

Additionally, Managers enter details about their organization and contact information to share with customers who apply using a referral campaign link by completing "Share your details with Customers" section.

Share your details with customers

This information will be shared to customers when they apply using the referral link or QR code.

CBO Contact Information

Email

Phone Number

Website

CBO Address

Address Line 1

Address Line 2

City

State

Zip Code

Preview of Referral URL

CREATE REFERRAL CAMPAIGN



Step 25 – CBO Manager Dashboard > Referral Campaigns > Reports

[Back to Dashboard](#)

Referral Campaigns

Campaigns
Reports

Generate a Report

Select the campaign data you would like to export.

Applications submitted between:

Date From:

Date To:

Campaign Status

Active Archived

Campaigns

EXPORT CAMPAIGN DATA

Generate a Report screen is displayed only for CBO Manager accounts.

Date From: the campaigns and applications submitted from this date.

Date To: the campaigns and applications submitted up to this date.

Campaign Status: Displayed only when the CBO Organization has referral campaigns

Active: When checked, the active campaigns will be displayed below. If the user also selects the "Archived" checkbox along with the "Active" checkbox, the search will respond with the same result set i.e. All the referrals.

Archived: When checked, the archived campaigns will be displayed below. If the user also selects the "Active" checkbox along with the "Archived" checkbox, the search will respond with the same result set i.e. All the referrals.

Campaigns: The drop-down menu will display all campaigns of the organization. When selected, campaigns will be extracted.

Manager can click "**EXPORT CAMPAIGN DATA**" button to export the indicated report data.



Step 26 – CBO Manager Dashboard > Referral Campaigns > Campaign Details > Campaign Status Selected as Active

< Back to Referral Campaigns

Referral Campaign

Test09 18 2025 07 29 36 640

Campaign Details

Campaign Status	Campaign Start Date
Active	09/17/2025
Email	
Phone Number	
Website	
Address	

[Edit](#)

[ARCHIVE CAMPAIGN](#)

Share your Referral Campaign!

Referral URL
<https://sit2-app.sit.benefitscaldev.com/r/TYWTONI>

[COPY REFERRAL URL](#)

Referral QR Code

[DOWNLOAD QR CODE](#)

Referral Campaign Statistics

Total Unique Applications Submitted
1

Applications Submitted per Program

Program	Count
CalFresh	1
Medi-Cal	0
CALWORKS	0
GA/GR	0

Note: An application can include multiple programs. The count above shows the number of applications that included each program.
 To see all your campaign data, including applications submitted per county, select "Export Campaign Data".

[EXPORT CAMPAIGN DATA](#)

Referral campaign in "Active" status.

Campaign Name: Displays the Campaign Name.

Campaign Details file displays the following:

- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

Edit: upon clicking this button, the Manager will be navigated to Edit file where they can update the CBO contact information and CBO address.

Share your Referral Campaign: Only displayed for active campaigns

Referral URL: Displays the referral URL pulled from the database for the campaign

Referral QR Code: Displays the referral QR Code.

Referral Campaign Statistics: Displays the referral campaign statistics.

- Displays the unique number of applications submitted in BenefitsCal using this Campaign code.
- Number of total applications by program will be displayed by categorized bar chart outline.
- All 4 programs will be always displayed

EXPORT CAMPAIGN DATA:

Upon click, the indicated report will export the data. Sample in "Referral Campaign Data Export". A new file will be downloaded in the user's browser.



[Back to Referral Campaigns](#)

Referral Campaign

Test09 18 2025 07 29 36 640

Campaign Details

Campaign Status	Campaign Start Date
Active	09/17/2025

CBO Contact Information

Email

Phone Number

Website

CBO Address

Address Line 1

Address Line 2

City

State

Zip Code

Upon clicking "EDIT" button on "Campaign Details" page, the new file will be expanded, and Manager can update CBO Contact information and CBO Address.

Also, Managers can archive the campaign after clicking "**ARCHIVE CAMPAIGN**" button.



Step 27 – CBO Manager Dashboard > Referral Campaigns > Campaign Details > Campaign Status Selected as Archived

< Back to Referral Campaigns

Referral Campaign

Test08 01 2025 12 51 41 718

Campaign Details

Campaign Status	Archived	Campaign Start Date	07/31/2025
Email			
Phone Number			
Website			
Address			
Campaign Archived Date	09/15/2025		

Referral Campaign Statistics

Total Unique Applications Submitted

1

Applications Submitted per Program

Program	Applications Submitted
CalFresh	0
CALWORKS	1
Medi-Cal	0
GA/GR	0

Note: An application can include multiple programs. The count above shows the number of applications that included each program.
To see all your campaign data, including applications submitted per county, select "Export Campaign Data".

[EXPORT CAMPAIGN DATA](#)

Referral campaign in "**Archived**" status.

Campaign Name: Displays the Campaign Name.

Campaign Details tile displays the following:

- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

Referral Campaign Statistics: Displays the referral campaign statistics.

- Displays the unique number of applications submitted in BenefitsCal using this Campaign code.
- Number of total applications by program will be displayed by categorized bar chart outline.
- All 4 programs will be always displayed

EXPORT CAMPAIGN DATA:

Upon click, the indicated report will export the data. Sample in "Referral Campaign Data Export". A new file will be downloaded in the user's browser.



Step 28 – Manager Dashboard > Staff Management

Managers can add Assisters and view staff information and mark a staff member as inactive.

Step 29 – Manager Dashboard > Staff Management > Add Staff

To create an Assister account, the Manager can click the "Add Staff" button and complete the "Let's create an assister account" form. Complete the form and click the **CREATE ASSISTER ACCOUNT** button.



An email will then be sent to the Assister's email prompting them to create an account by clicking "Complete your BenefitsCal Registration" link.

Hello,

We created your CBO account on the BenefitsCal portal. Please follow the below instructions to complete your account registration process.

Your userID: **jim_doe_01@mailinator.com**

Please verify your email address and set your password by clicking on [this link](#):

[Complete your BenefitsCal Registration](#)

Please do not reply to this email. It has been automatically generated and replies will go to an unattended inbox.

If you have any questions, [contact your local office](#).

Thank you,

BenefitsCal

This message (including any attachments) contains confidential information intended for a specific individual and purpose, and is protected by law. If you are not the intended recipient, you should delete this message. Any unauthorized disclosure, copying, or distribution of this message, or the taking of any action based on it, is strictly prohibited.

The Assister will then be asked to set their password. Once they have entered their password and then re-entered it again to confirm it, they can click "Save" to finish creating their CBO Assister account.



The screenshot shows the BenefitsCal website interface. At the top, there is a navigation bar with the logo, 'Home', 'Apply For Benefits', 'Programs', 'Help', a language dropdown set to 'English', a 'Log In' button, and a search bar. The main content area has a heading: "Now, let's set up a few questions in case you forget your password." Below this, there are three identical security question sections. Each section consists of a dropdown menu labeled "First Security Question (required)", "Second Security Question (required)", and "Third Security Question (required)" respectively. Below each dropdown is a text input field labeled "Answer (required)". A small note "Only include letters and numbers." is placed between the question and answer fields. At the bottom of the form, there is a back arrow button and a red "SAVE" button.

Manager FAQs

Q: If no one in my organization has a BenefitsCal account, can I still create a Manager account?

A: Yes, creating a CBO Manager account will also add your organization if it's new to BenefitsCal.

Q: If there are multiple Managers in my organization, do we need to share an account or can we request separate accounts?

A: You can request more than one CBO Manager account for each CBO. If you and another Manager belong to the same organization, please make sure that when you request your accounts you all use the same Organization Name.

Q: When I try to log in, I see a message telling me my account is inactive. What should I do to re-activate my account?

A: Please reach out to your County Office for help re-activating your account.

Q: Can I delete a CBO Assister account if they are one of my staff?

A: CBO Managers cannot delete Assister accounts, they can only deactivate them.

General FAQs

Q: If a customer submits an application through my referral campaign link, will I be able to see their application details?

A: No, if a customer submits an application on their own after clicking the referral link, it will count as a submitted application in your Referral Campaign Statistics and Reports, but you will not be able to see any application details.

Q: If I am assisting a customer, can I log into their account to help them with their case?



A: No, CBO users should not log in to a customer's account under any circumstances. If you are assisting a customer in person, they can log in to their account and go through it with you.

Q: What information do I need from my customer in order to upload documents to their case/application?

A: You will need your customer's application or case number as well as their County in order to upload documents.