Community Based Organization (CBO) Dashboard

BenefitsCal

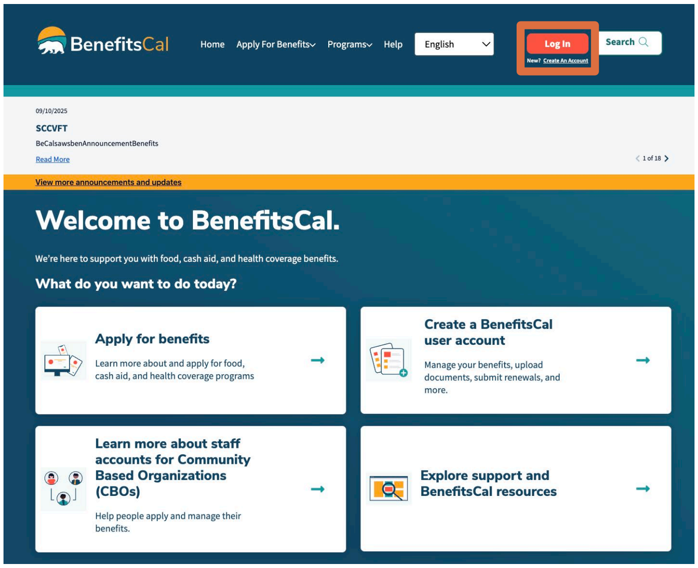
Table of Contents

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:

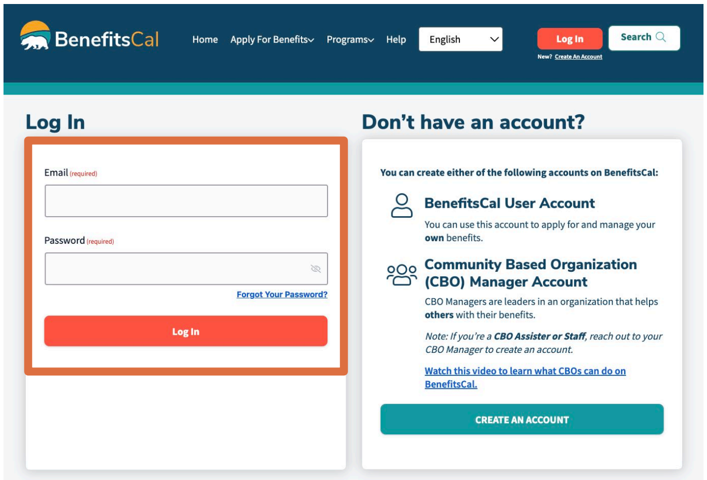
Assister

Step 1 – Welcome to BenefitsCal – Homepage



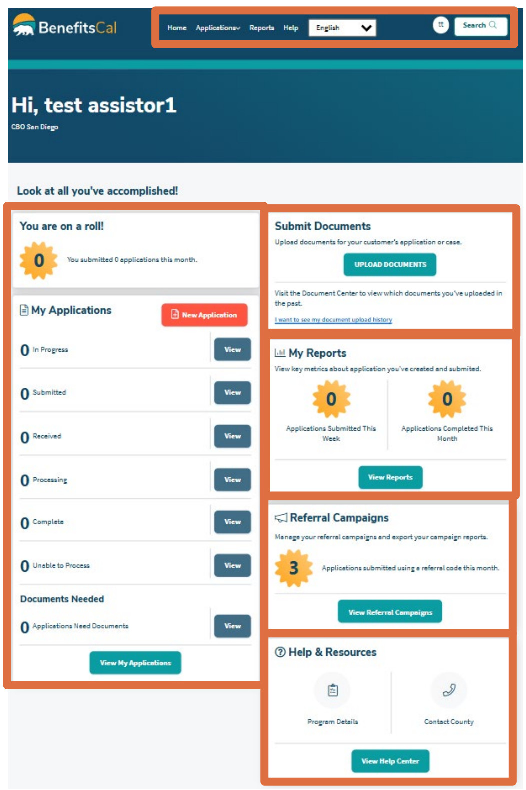
Click the **Login** button to login to your Assister account.

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.

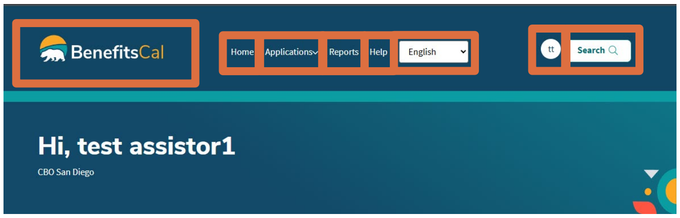
Submit Documents – allows the Assister to upload documents to a customer's application or case, as well as view their upload history.

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.

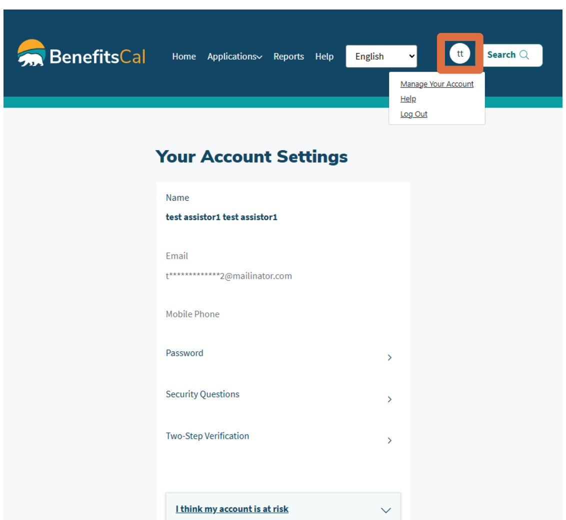
Help – provides access to blank forms (Periodic Reports, Renewals, etc.), find an office near their location, and view FAQs.

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.

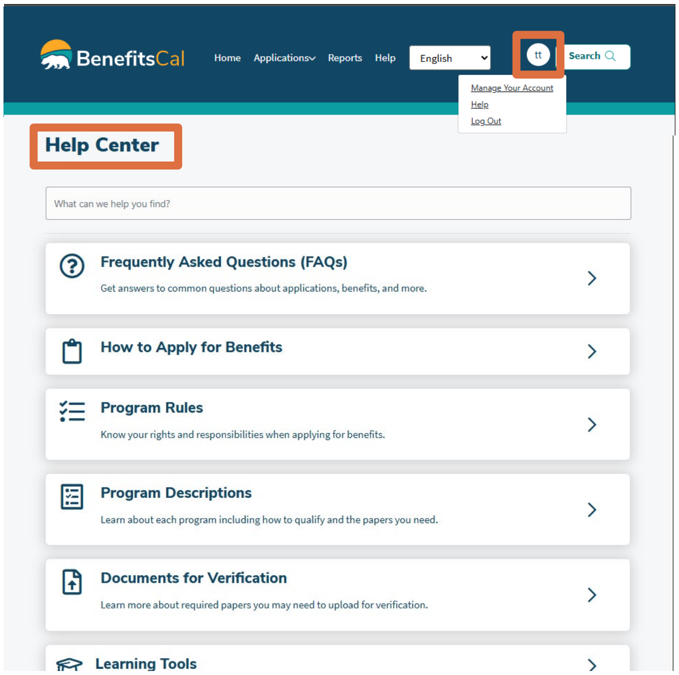
Step 5 – Dashboard > Manage Your Account



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.

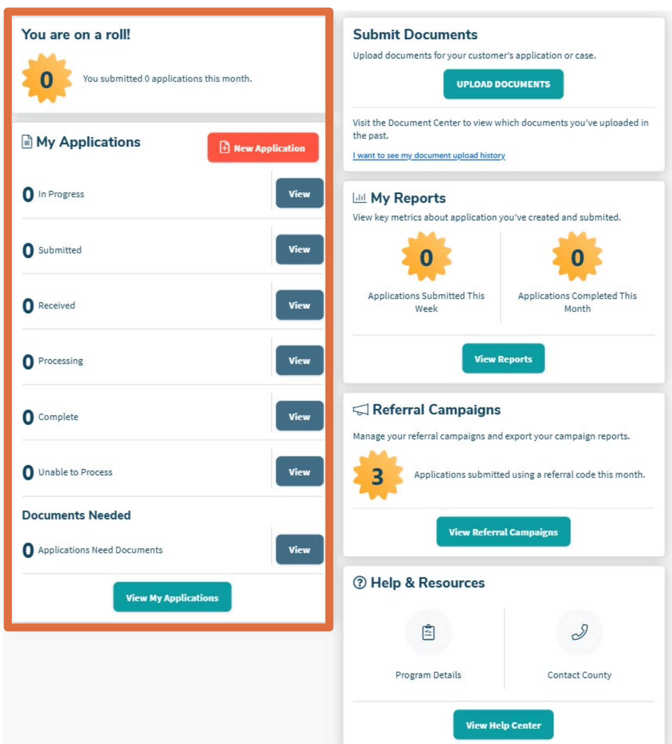
Step 6 – CBO > Dashboard > Help



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.

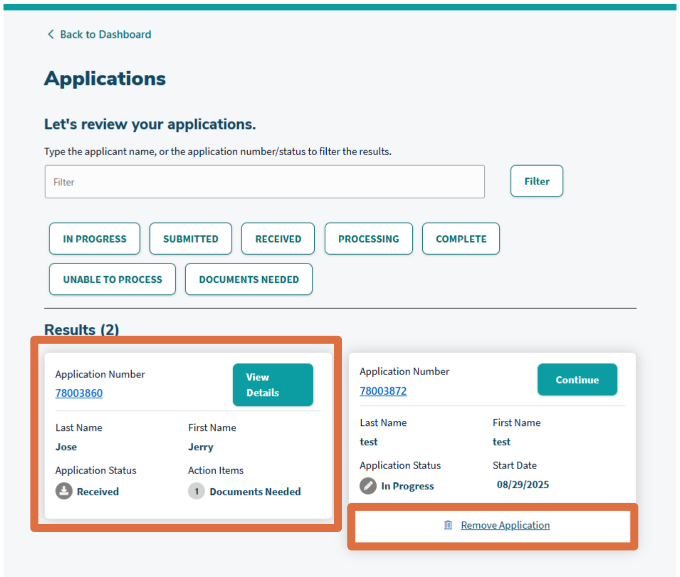
Complete displays the number of complete applications from the CBO account.

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



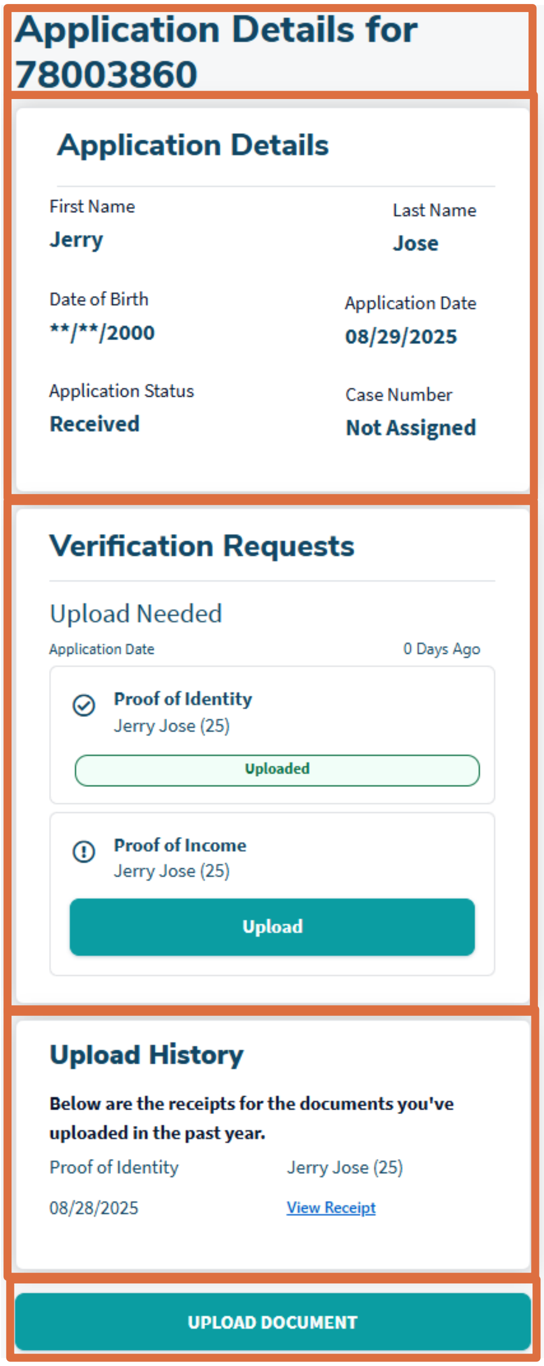
A tile displays each application the CBO created.

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



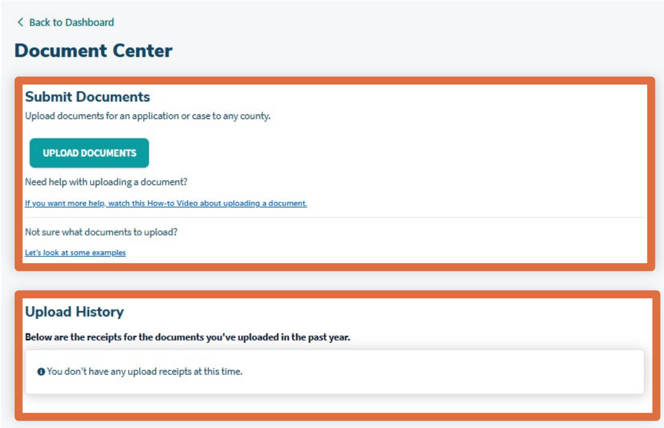
Application Details – displays application information

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.

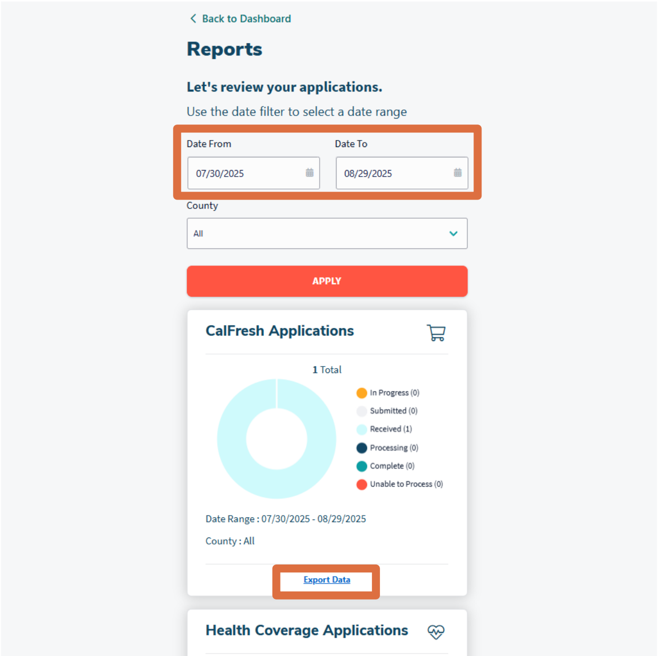
Step 10 – CBO Assister Dashboard > Submit Documents



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

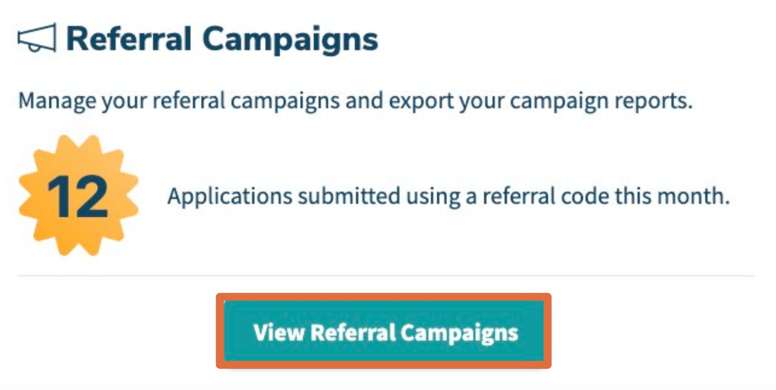


The CBO can see all their applications. Choose the Report period by entering a date in the **Date From** and **Date To** fields and clicking the **Apply** button.

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.

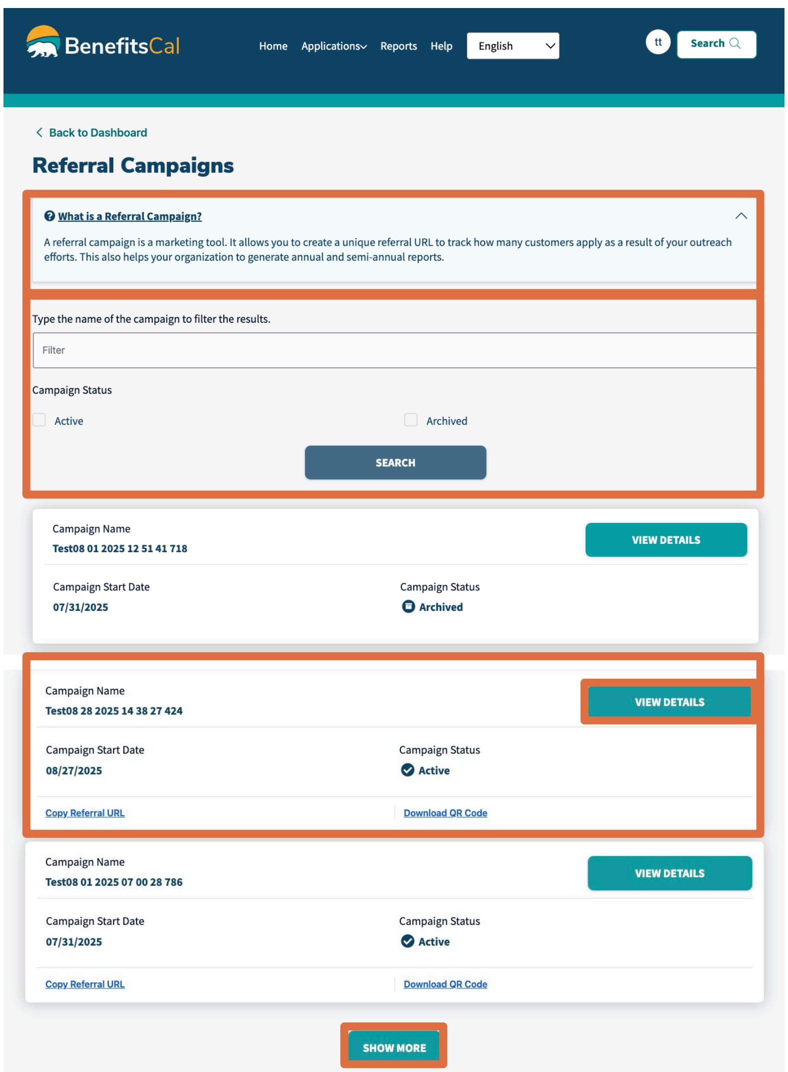
Step 12 – CBO Assister Dashboard > Referral Campaign



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 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.

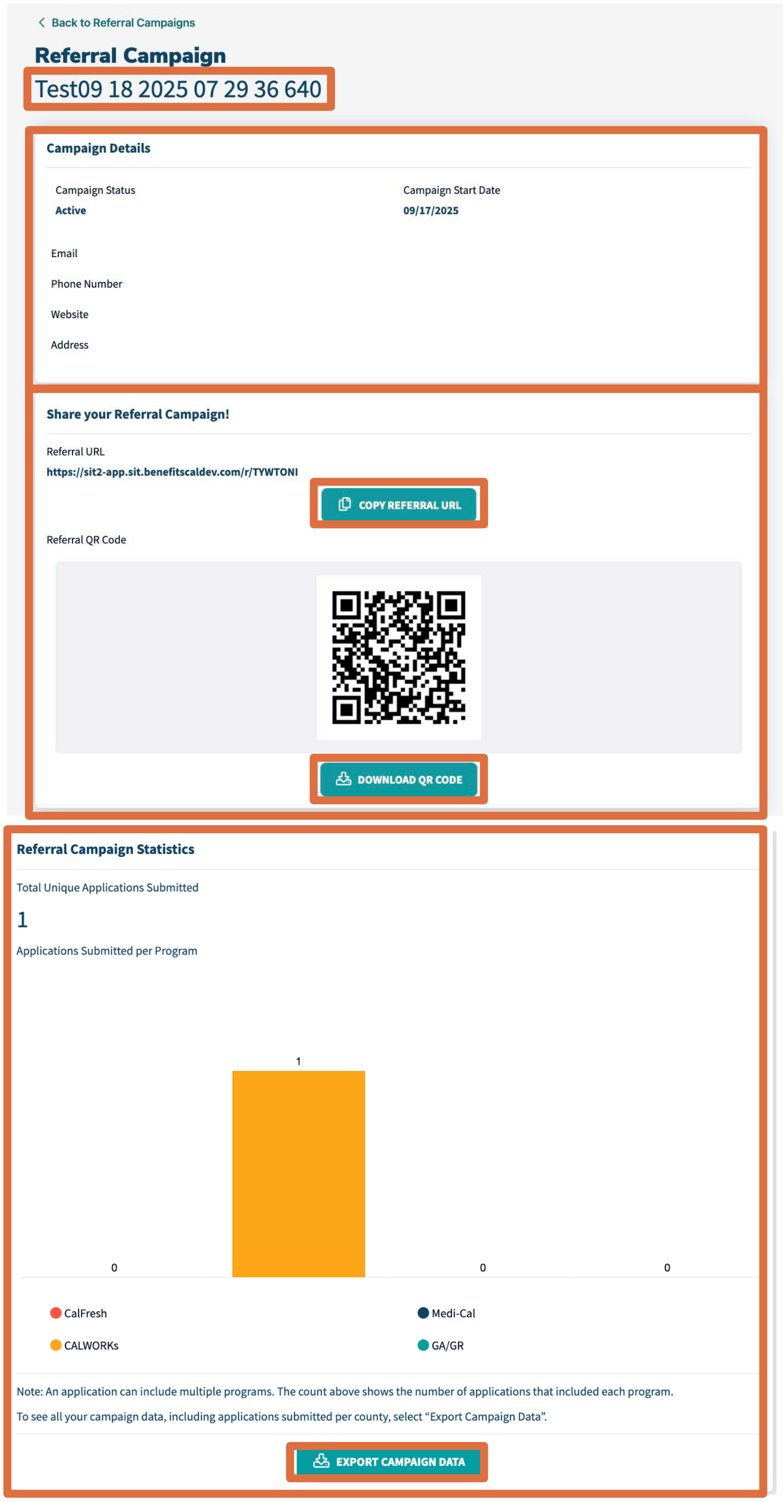
Each tile displays the following:

- 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



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

Campaign Name: Displays the Campaign Name.

Campaign Details tile 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

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

Campaign Name: Displays the Campaign Name.

Campaign Details tile displays the following:

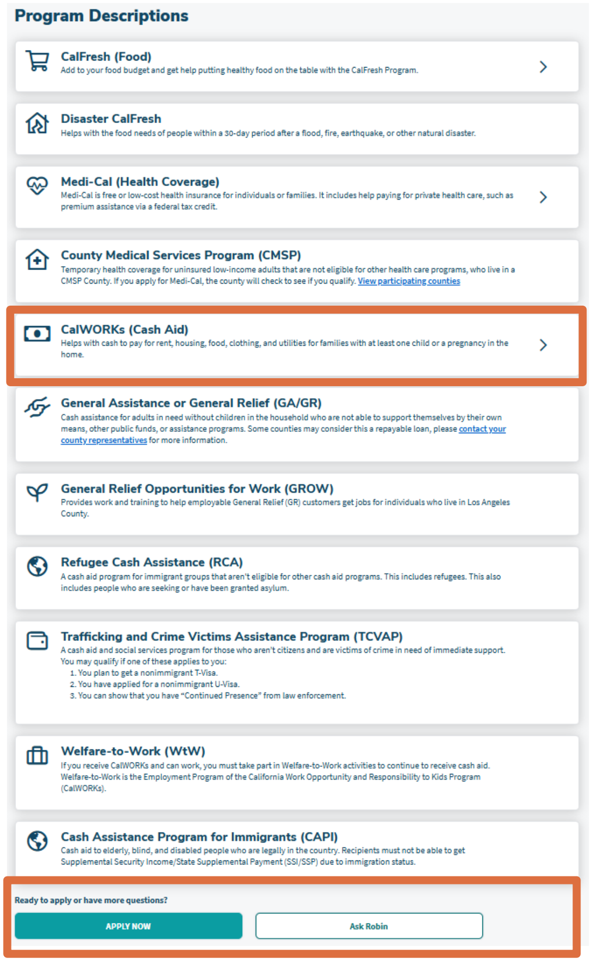
- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

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.

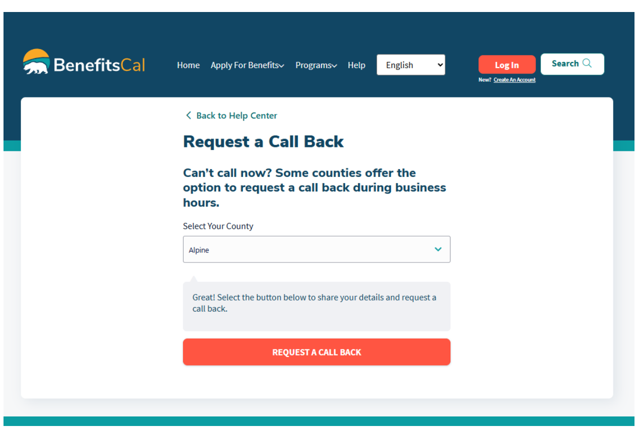
Step 16 – CBO Dashboard > Help Center > Program Details



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

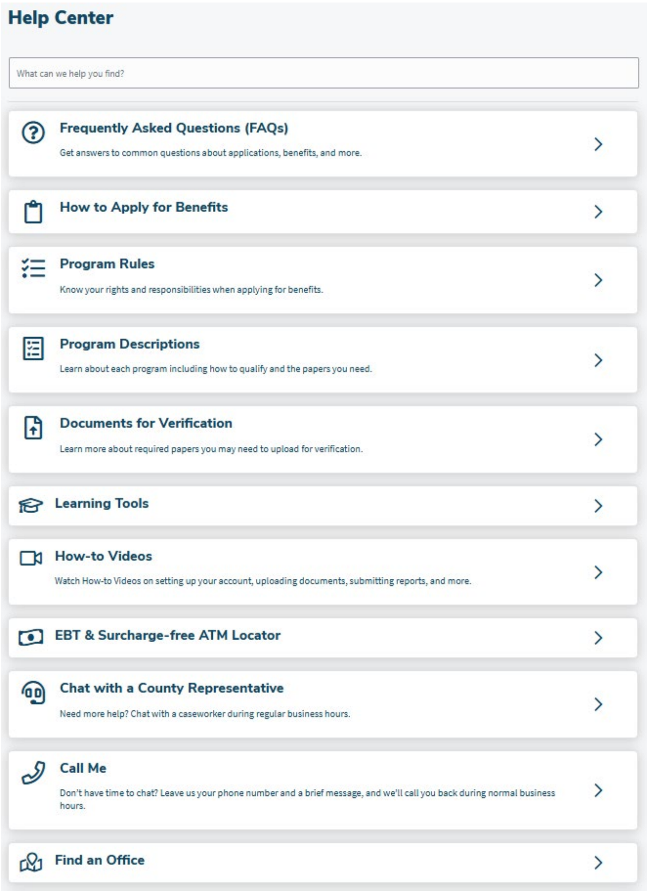


Request a Call Back. Allows you to leave a message for the County to call you back during regular business hours.

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??

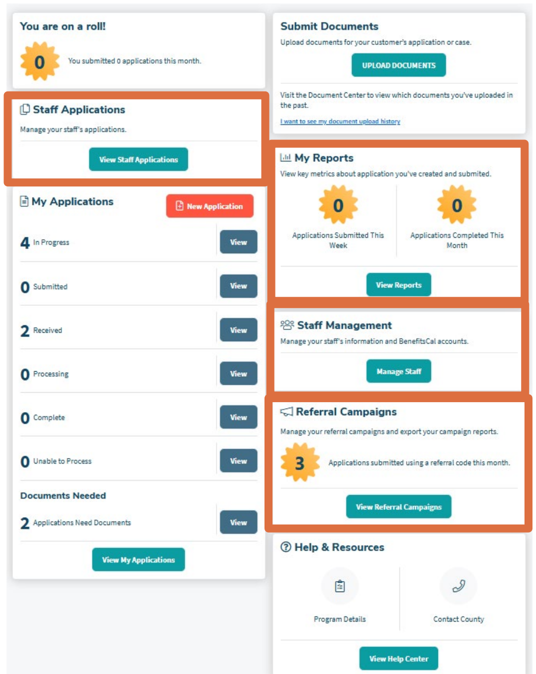
A: The type of account you have cannot be changed. You will need to request a CBO Manager account.

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:

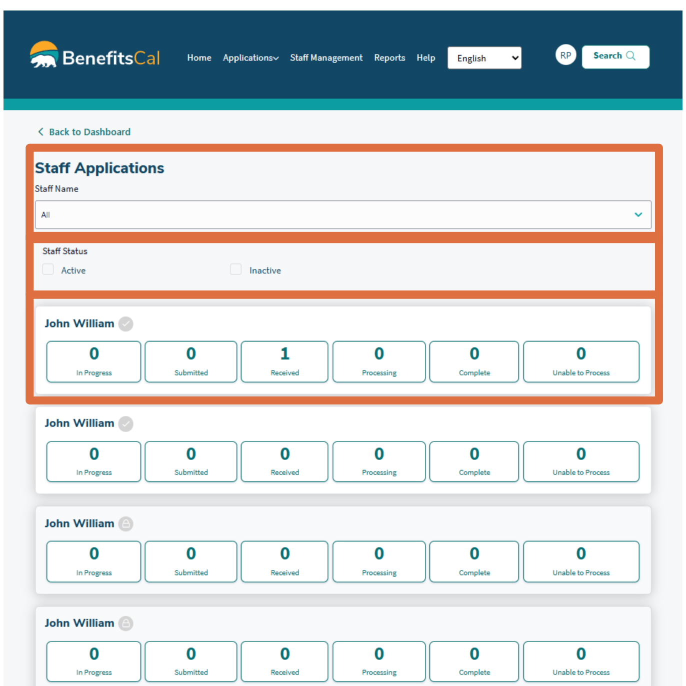
View Staff Applications – shows all staff members' applications.

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 Assisters.

Referrral 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



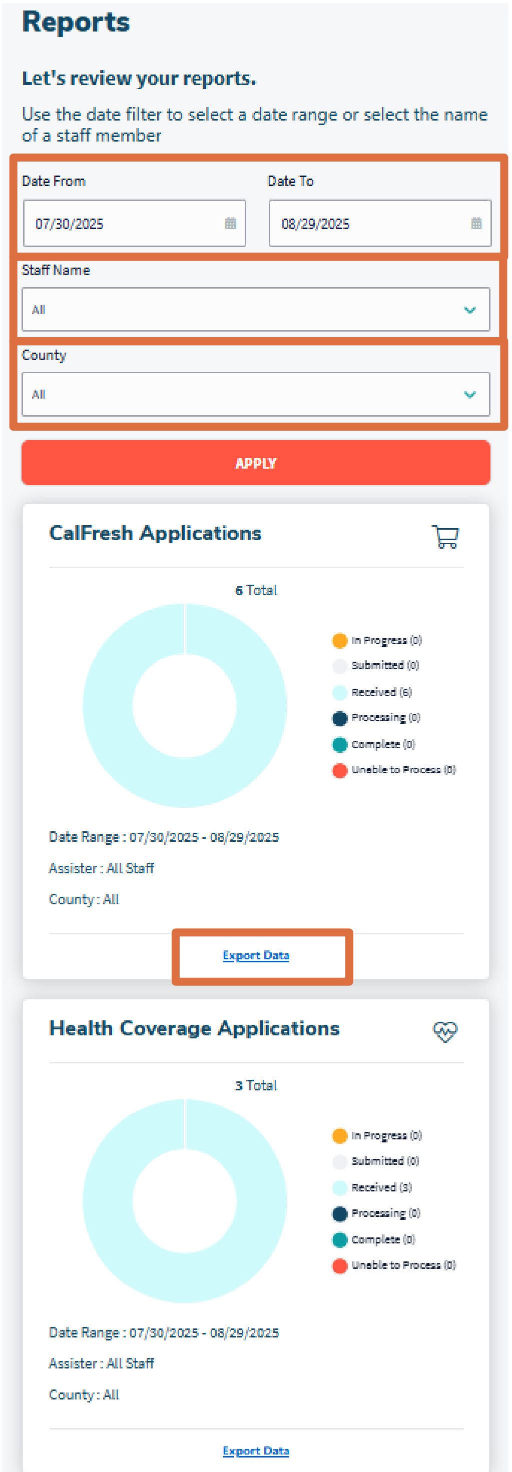
Managers can choose to look at all Staff Applications or individual applications by clicking the **Staff Name** drop list and selecting staff members.

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



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.

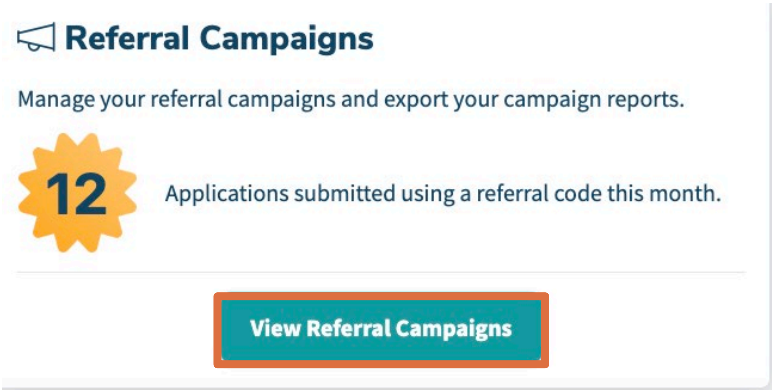
Click a county name or 'all' from the **County** drop list.

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.

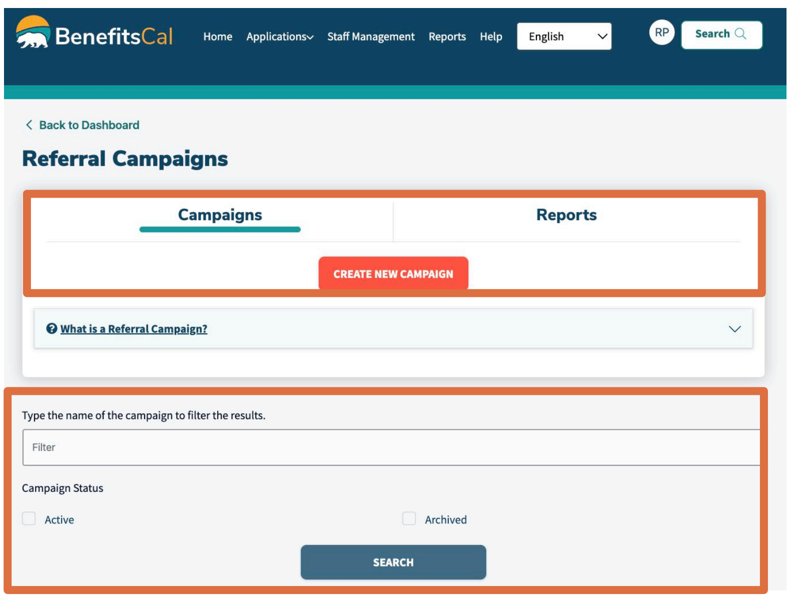
Step 22 – CBO Manager Dashboard > Referral Campaign



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.

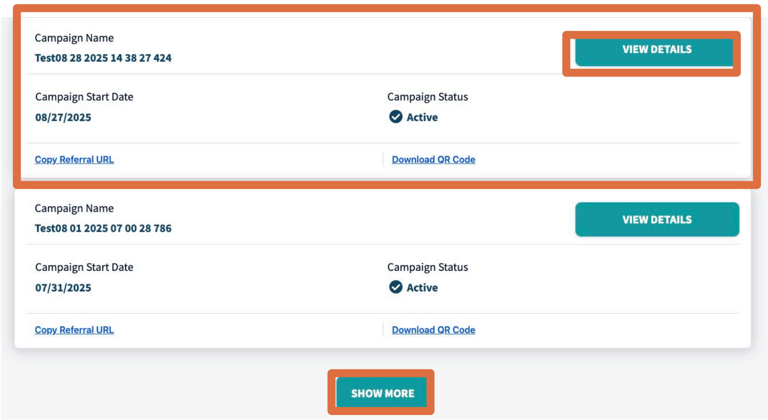
Create New Referral Campaign: Upon click, user will navigate to Create New Referral Campaign page, where they will be able to create their referral campaigns.

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.

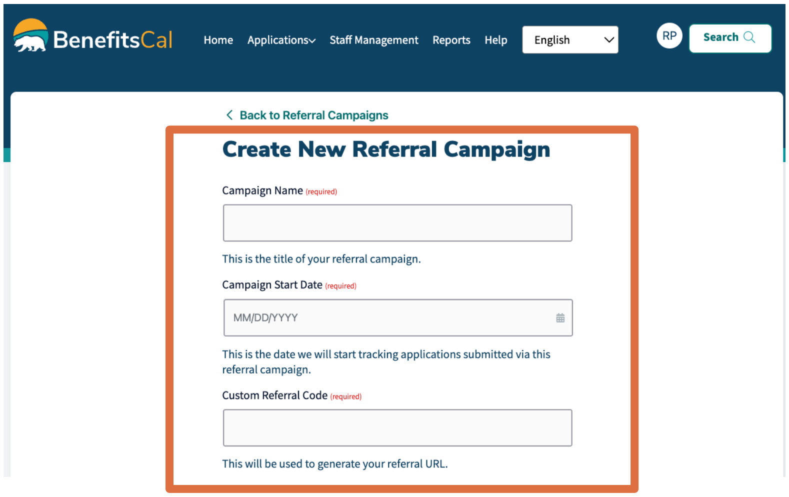
Each campaign tile displays the following:

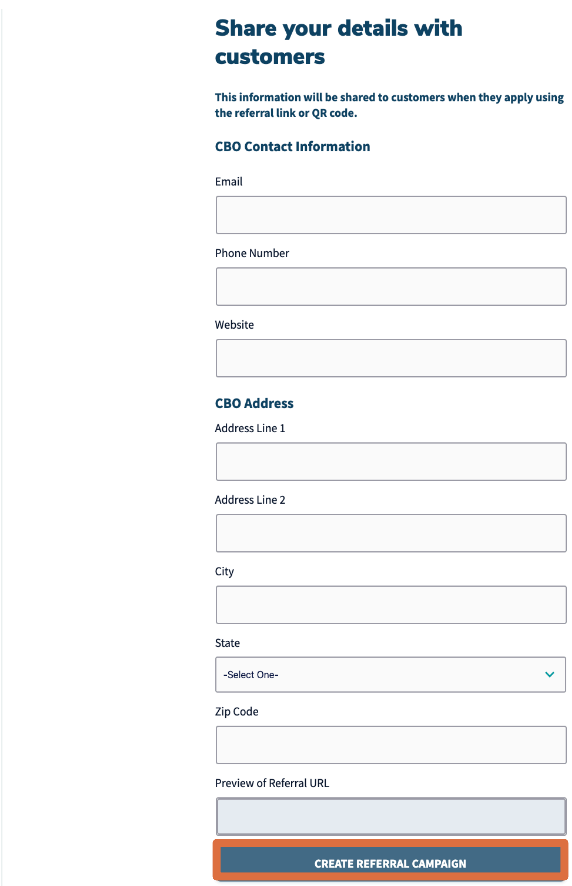
- Campaign Name
- Campaign Start Date
- Campaign Status
- Copy Referral URL
- Download QR Code

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

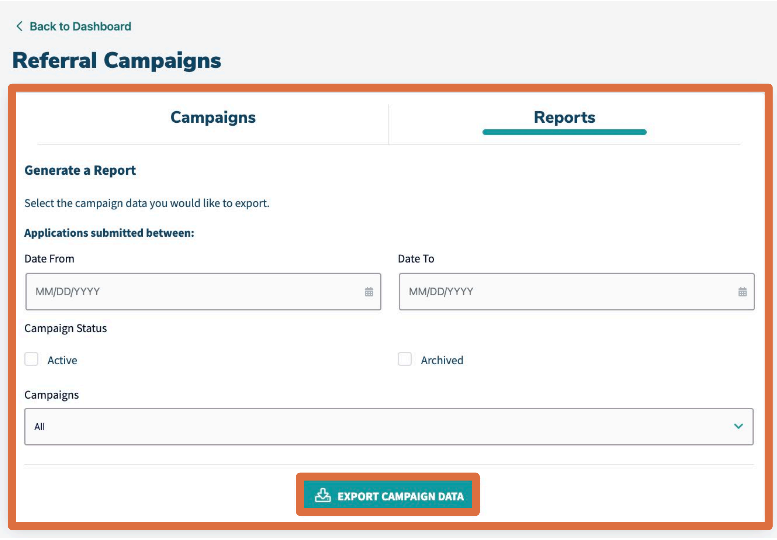




The CBO Manager can create new Referral Campaigns by completing the required fields (**Campaign Name**, **Campaign start date**, **Custom Referral code)** in the Create New Referral Campaign section and clicking the **CREATE REFERRAL CAMPAIGN** button.

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.

Step 25 – CBO Manager Dashboard > Referral Campaigns > Reports



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

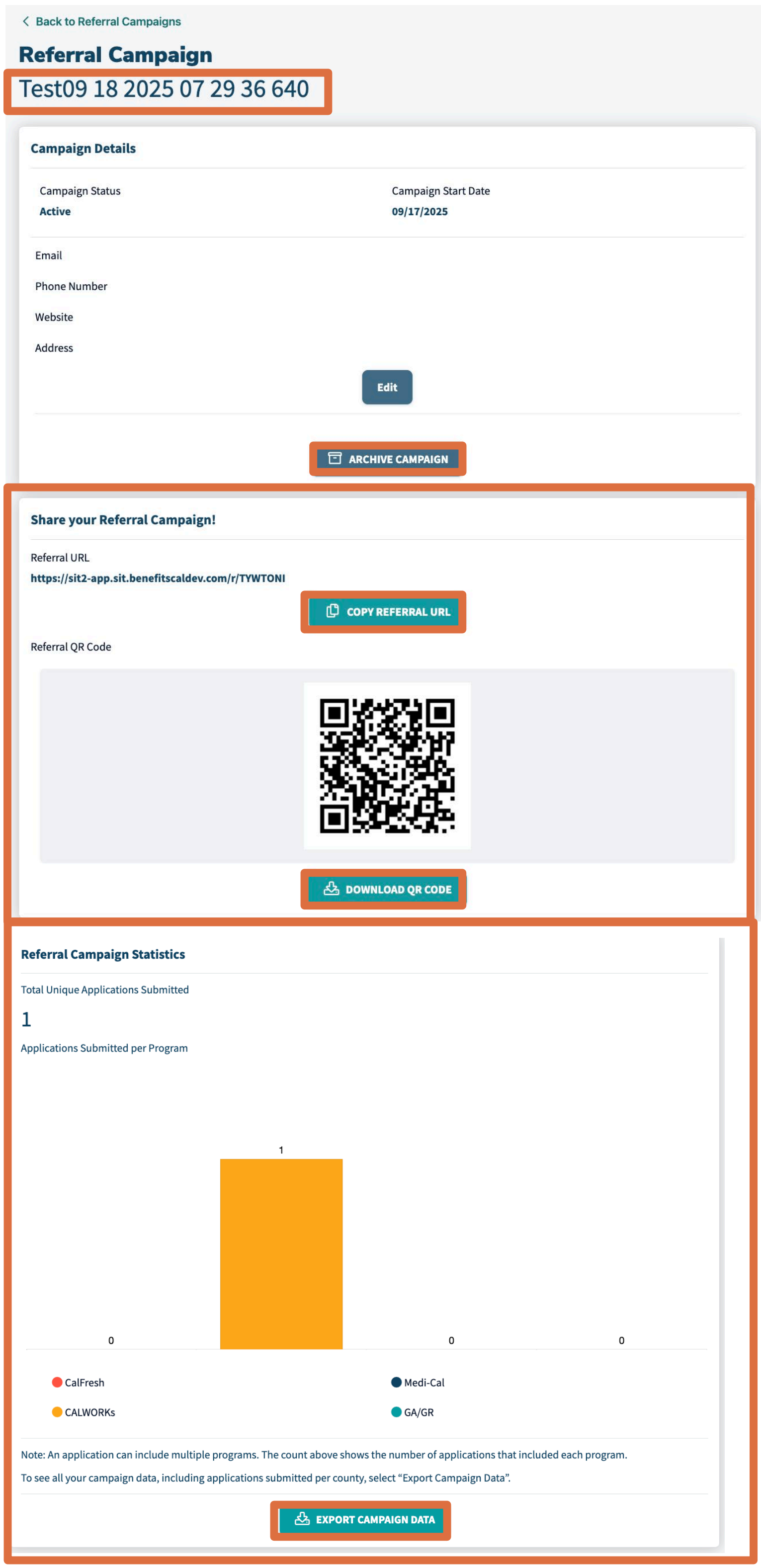
Active: When checked, the active campaigns will be displayed below. If the user also selects the "Archived" checkbox along with the "Active" checkbox, the search will respond with the same result set i.e. All the referrals.

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



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

Campaign Name: Displays the Campaign Name.

Campaign Details tile 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 tile where they can update the CBO contact information and CBO address.

Share your Referral Campaign: Only displayed for active campaigns

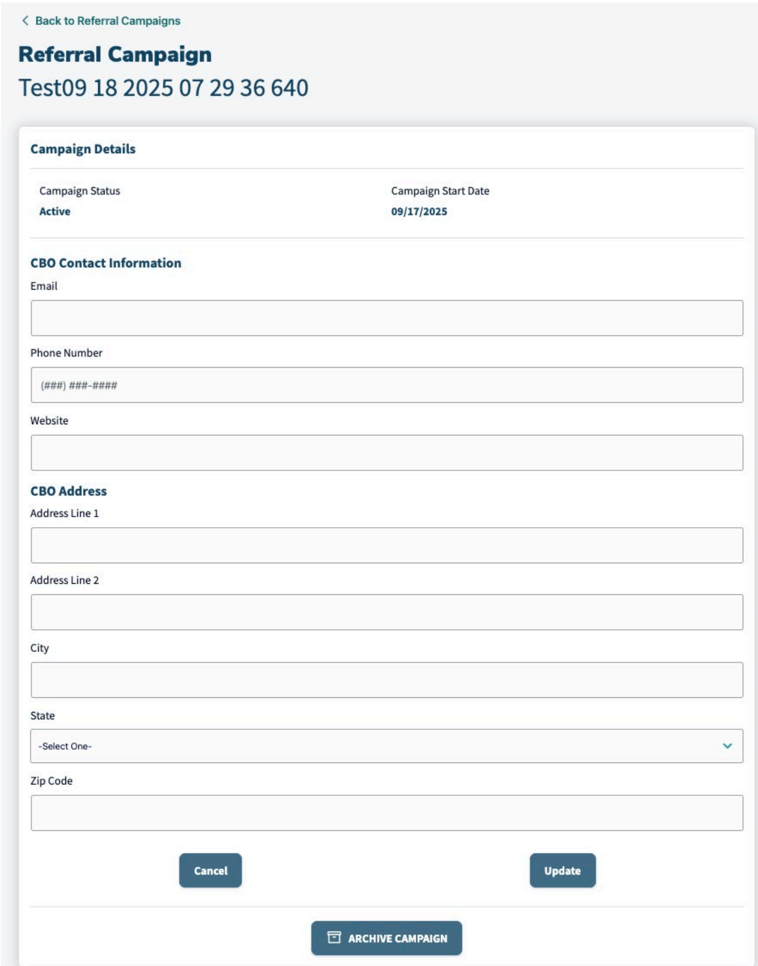
Referral URL: Displays the referral URL pulled from the database for the campaign

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.



Upon clicking “EDIT” button on “Campaign Details page, the new tile 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

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

Campaign Name: Displays the Campaign Name.

Campaign Details tile displays the following:

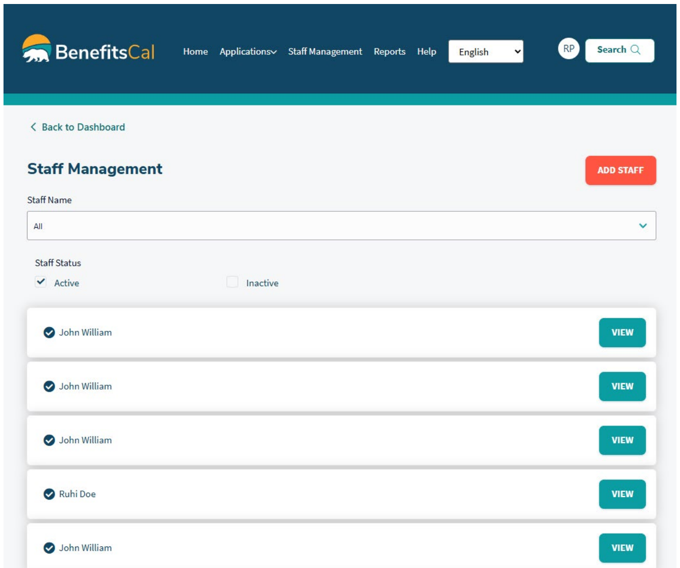
- Campaign Status
- Campaign Start Date
- Email
- Phone Number
- Website
- Address

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

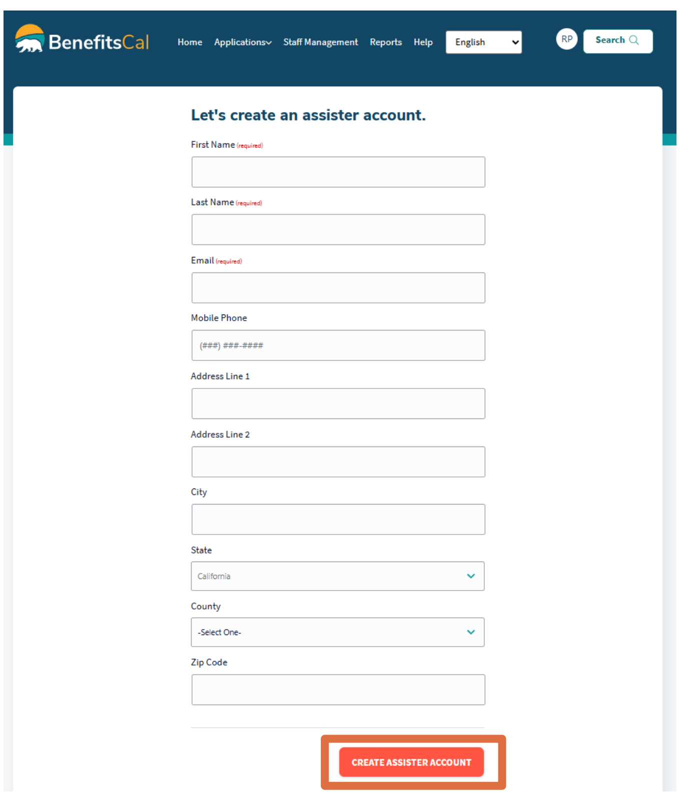
EXPORT CAMPAIGN DATA:
Upon click, the indicated report will export the data. Sample in "Referral Campaign Data Export". A new file will be downloaded in the user's browser.

Step 28 – Manager Dashboard > Staff Management

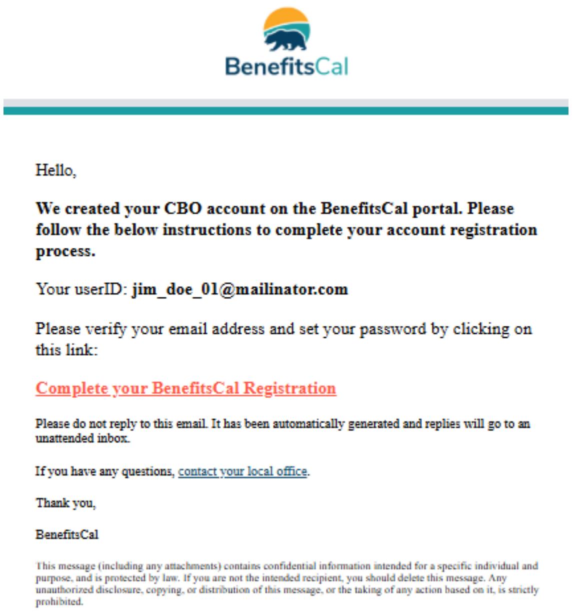


Managers can add Assisters and view staff information and mark a staff member as inactive.

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.



BenefitsCal

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.

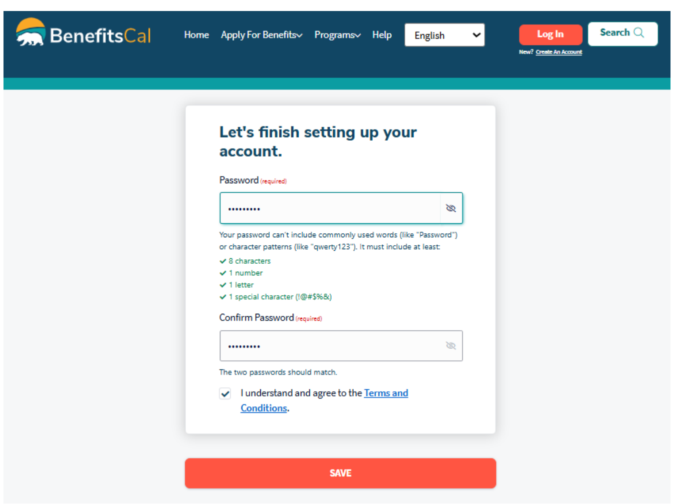
If you have any questions, contact your local office.

Thank you,

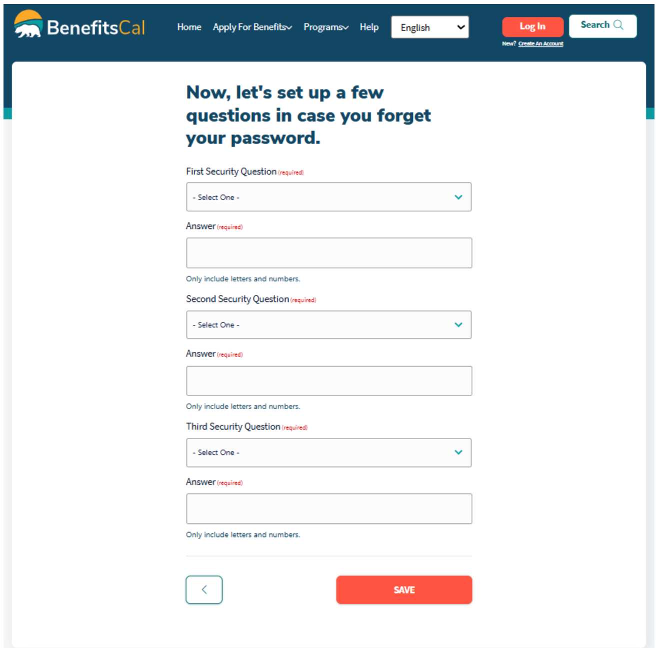
BenefitsCal

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.

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



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.



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 a 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.