

CalSAWS | Welcome CalWIN!  
BenefitsCal Training Q&A



May 18, 2023

# Agenda

- ① Introductions (2 mins)
- ② Training Materials (3 mins)
- ③ Demo: Create CBO Account (15 mins)
  - FAQs
- ④ Review: CBO Referral Campaign (5 mins)
- ⑤ Demo: Create Customer Account (5 min)
  - FAQ
- ⑥ Demo: Apply for Benefits (20 mins)
  - Review: Student App
  - FAQs
- ⑦ Demo: Customer Account (20 min)
  - Case Linking
  - Renewing Benefits
  - Support Requests
  - FAQs
- ⑧ Demo: Release of Information (ROI)
- ⑨ Open Q&A (35 mins)
- ⑩ Pulse Check: Survey (5 mins)

# Introductions

## **Joel Acevedo**

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BenefitsCal Project Manager  
CalSAWS

## **Marsale Eramya**

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BenefitsCal BA  
CalSAWS

## **Carrie White**

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BenefitsCal BA  
CalSAWS

## **Carlos Zepeda**

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BenefitsCal BA  
CalSAWS

## **Jerry Hernandez**

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BenefitsCal BA  
CalSAWS

## **Ramya Raghunathan**

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CalWIN Project  
Lead - BenefitsCal

## **Brook Sinclair**

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User Centered  
Design (UCD) Lead

## **Natosha Arrington**

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BenefitsCal – M&O

## **Bhargavi Lingamaneni**

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BenefitsCal - Tester

# Future Training Sessions

A few more are planned

1. 05/18/23 – Training for San Mateo and San Diego
2. 05/23/23 – Training for Santa Cruz and Solama
3. 05/25/23 – Awareness Training for CBOs

BenefitsCal UAT environment:

<https://uat2-app.uat.benefitscaldev.com/>

1. Access Key: ZEnomlqa]QWB67S031Fjq36MHgo
2. Please note: UAT access key gets refreshed every 2 months.

# BenefitsCal Training Materials

The following materials are available

- BenefitsCal\_QuickRef\_Guides: [BenefitsCal – CalSAWS](#)
- BenefitsCal\_Videos: [Videos](#)
  - ROI Recording: [Web Portal > Trainings > Videos > ROI](#)
- BenefitsCal FAQs: [BenefitsCal\\_FAQs.xlsx](#)
- BenefitsCal FACT sheets: [Fact Sheets](#)

**22**

**Quick Guides**

**11**

**Micro Videos**

**7**

**FACT Sheets**

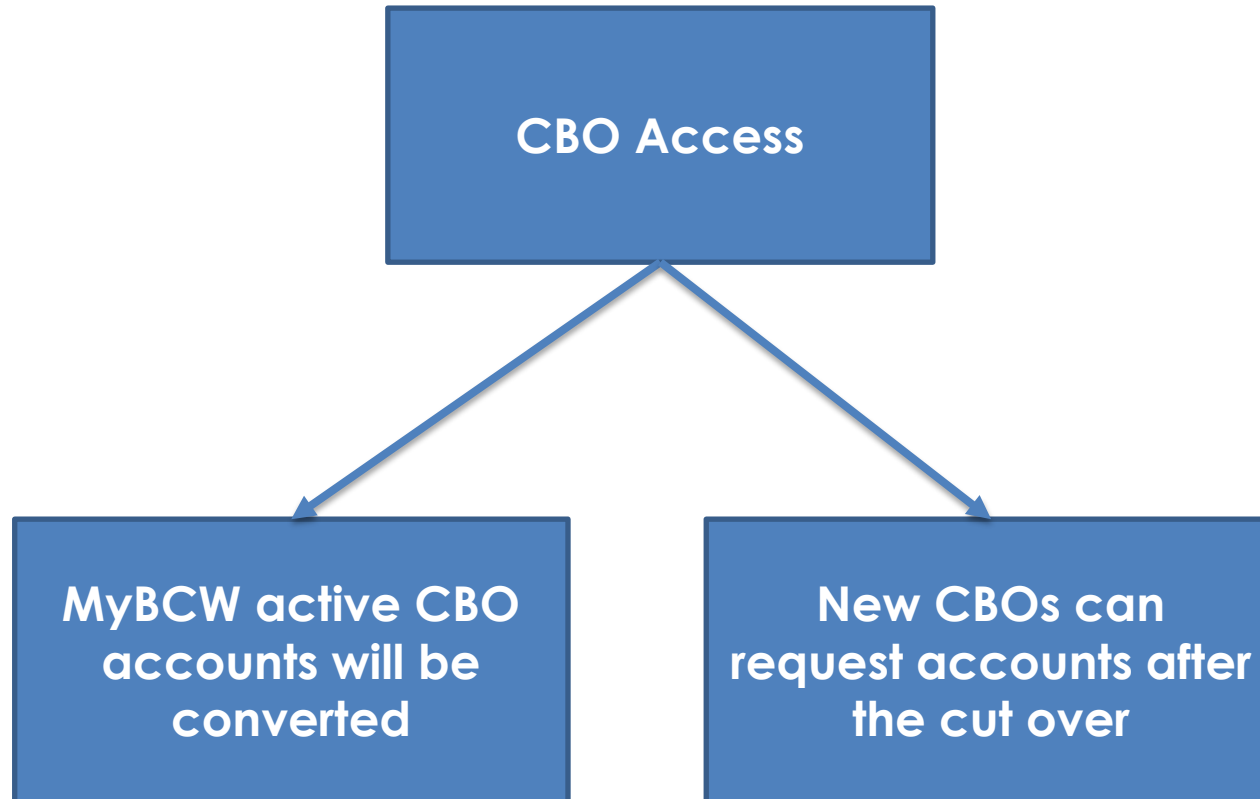


# Converted CBO Account

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# BenefitsCal

## CBO Accounts



# CBO Account Conversion

List of organizations where at least one CBO account will be converted

1. Fair Oaks Community Center
2. Single Stop JobTrain
3. Daly City Youth Health Center
4. Puente de la Costa Sur
5. Coastside Hope
6. Health Benefits Resource Center
7. Skyline College
8. North East Medical Services
9. Pacifica Resource Center a Proj of the Tides CTR
10. Service Connect
11. SparkPoint at Canada College
12. Code for America
13. Ctr for Independence of Individuals w Disabilities
14. San Mateo County Health
15. Housing Choices
16. San Mateo County Outreach
17. Life Moves
18. Catholic Charities Center for Immigration Legal
19. Jericho Project
20. Nuestra Casa



# CBO Account Conversion

## List of organizations where at least one CBO account will be converted

1. San Diego Hunger Coalition
2. Neighborhood Health Care
3. San Diego Food Bank
4. SAY San Diego
5. MAAC Project
6. Home Start Inc.
7. Mountain Health and Community Services
8. San Diego Freedom Ranch
9. La Maestra Community Health Centers
10. Community Resource Center
11. Vista Community Clinic
12. TrueCare
13. Interfaith Community Services
14. Indian Health Council Inc.
15. Scripps Health
16. Feeding San Diego
17. United Healthcare Community and State
18. Family Health Centers of San Diego
19. UCSD Medical Center
20. San Diego Family Care
21. 211 San Diego
22. BAME Renaissance Community Development Corporation
23. Alliance for African Assistance
24. San Diego Housing Commission
25. San Diegans for Healthcare Coverage
26. Code for America - SD
27. SDG CBO Test Account
28. Heartland House
29. Alvarado Hospital LLC
30. San Diego Regional Center
31. SBCS
32. Saint Paul Pace
33. Home Start - CalFresh Grant
34. Southern Indian Health Council Inc
35. Neighborhood Health Insurance Center

1. Associated Students San Diego State University
2. Village Square Healthcare Center
3. Clinica International Buena Salud
4. San Diego Unified School District
5. Chaldean Middle Eastern Social Services
6. San Ysidro Health Center.
7. UC San Diego: The Hub Basic Needs Center
8. McAlister Institute NC Women
9. Bonita Family Resource Center
10. SSA Assisted - No Interview Required
11. Union of Pan Asian Community
12. Adventure Point Early Learning Center
13. VSD Victim Assistance Program (VAP)
14. Access to Independence of San Diego Inc
15. Sharp Health
16. Chula Vista Community Collaborative
17. Tri City Medical Center
18. Palomar Health
19. International Rescue Committee Inc
20. Borrego Health
21. Paradise Valley Health
22. Casa Familiar
23. Community Wellbeing San Diego
24. Somali Bantu Association of America
25. Community Research Foundation
26. Gary and Mary West PACE
27. Community Research Foundation - Senior Impact
28. Southwestern College
29. Monarch School Project
30. TERI Inc
31. Refuge for Women SoCal Inc
32. Rady Childrens Hospital
33. Avocado Post Acute
34. Julian Pathways Inc
35. Foundation for Senior Care
36. Third Avenue Charitable Organization

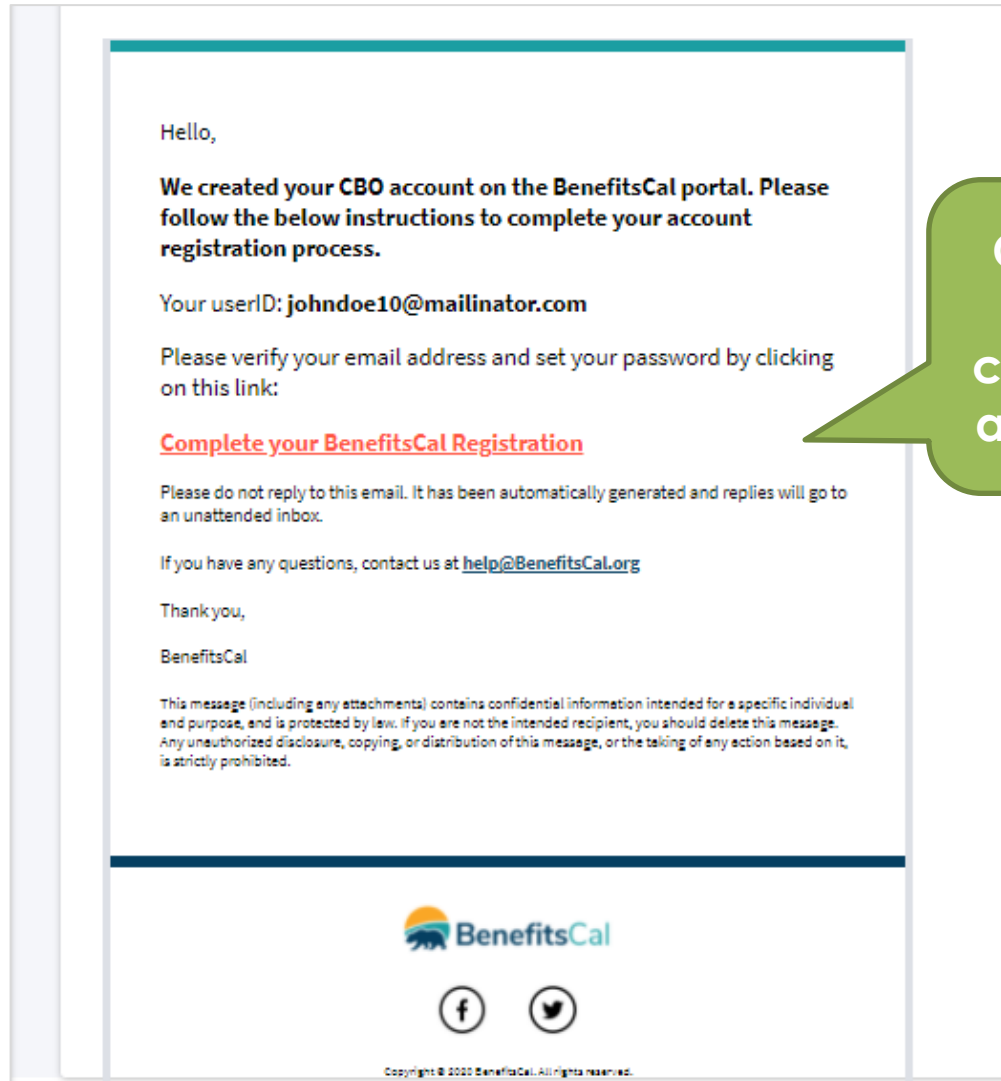


# Demo: Request a CBO Account

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# Converted CBO accounts

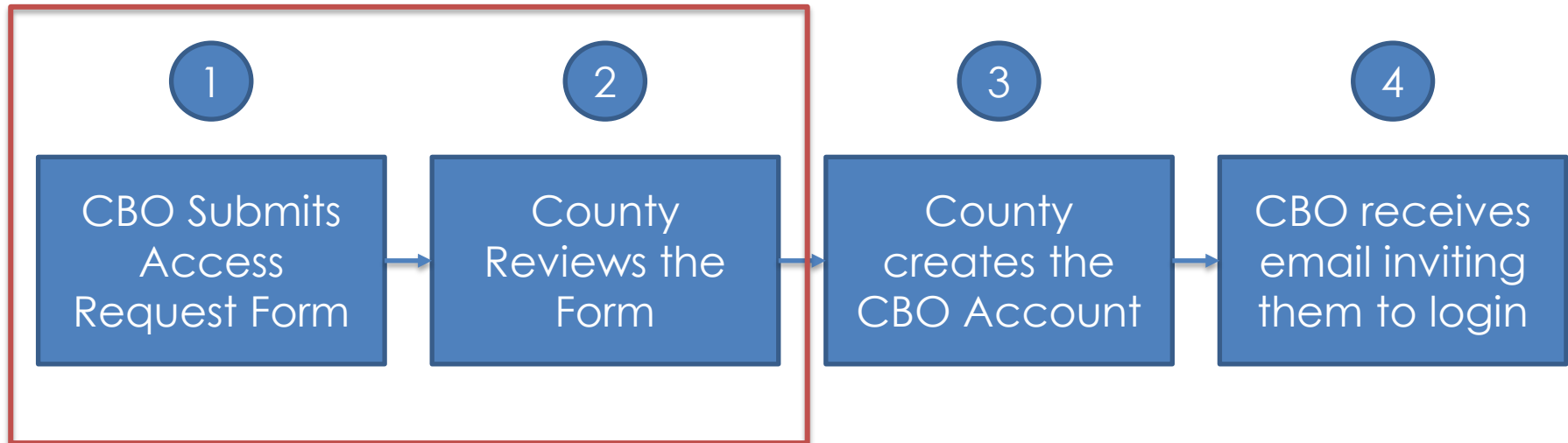
If your account is converted, you'll receive an email inviting you to login to BenefitsCal, like this below:



Click this link  
to login and  
complete your  
account setup

# Request a new CBO Account

## Process



# BenefitsCal: CBO Access

## Manager & Staff roles

Feature	Manager	Staff
Login	X	X
Apply for Benefits	X	X
Upload Documents	X	X
View Reports with my applications	X	X
View Reports that include all apps for the organization	X	
Export reports to Excel	X	X
View all applications for the organization	X	
Resume an application on behalf of another	X	
Add/Remove Staff within their organization	X	

# Request a CBO Account

## Key Updates

Good to know...

### Here are some key updates:

- CBOs will request access through an online form, that is routed to the County for review and setup within ForgeRock
- CBOs must request access (online form)
- Two roles: CBO Manager and CBO Staff
- CBO Managers can add additional staff at their organization (no need to request from the County)
- Active MyBCW CBOs of wave4 counties will be converted to CBO accounts on BenefitsCal

# Request a CBO Account

## FAQs

### **Q: Who should use a CBO account?**

A: Only community-based organizations that assist customers to apply for benefits. County staff are invited to use the UAT environment to understand how BenefitsCal works and support customers.

### **Q: Will CBOs be able to view applications submitted in MyBCW?**

A: No, the CBO dashboard will display applications submitted from BenefitsCal, not MyBCW.

### **Q: Will CBOs be able to upload SAR7 documents for clients?**

A: Yes, if CBOs assisted the customer with their application, they could assist them with a SAR7.

### **Q: Who will CBOs contact if they need help using the system?**

A: They will contact their local offices for support, or AskCalSAWS.

### **Q: What if a CBO did not get their account set up email?**

A: CBO should check their spam or junk folders. They could also try to reset their password on BenefitsCal.com by clicking on forgot password.



Review: CBO Referral URL



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# CBO Referral URL

## FAQs

**Q: What information can the CBO see when an application was submitted via referral URL?**

A: Only aggregate counts for submitted applications by county and programs.

**Q: Is there a limit on the number of CBO referrals URLs that a CBO can create?**

A: No.

**Q: Can the whole organization see the referral URLs?**

A: Yes, the referral URLs and the associated data is connected to the whole organization.

**Q: Do CBO Managers and Assister have the same functionality?**

A: No. CBO Managers can create or archive a referral URL, view campaign data, and generate reports. CBO Assisters can see the active referral URLs and view campaign data.



# Demo: Create a Customer Account



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# Create a Customer Account

## Key Updates + FAQs

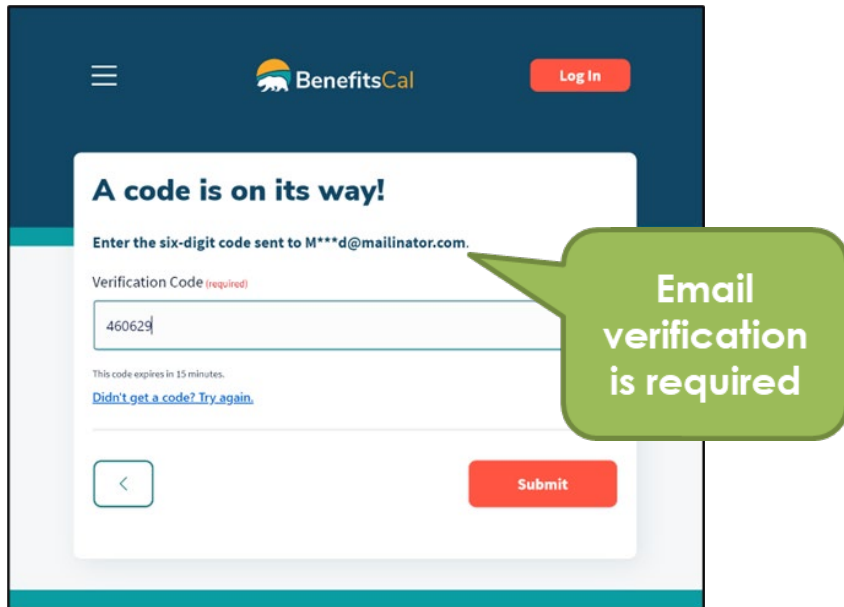
Good to know...

### Here are some key updates:

- An email address is required to create an account – recommended that a customer use their own email instead of a temporary email address
- Users must enter their username (email address) and password to login – they will not be able to login with demographic info (EBT, DOB, SSN, etc.)
- Users must enter security Q&A
- Accounts will lock after 3 incorrect password attempts, for 30 minutes (then they can try again)
- Customers can link an active case to their account; however, they cannot link a pending application to an account
- Customers can link multiple cases to one account as long as they are the primary applicant on the program
- Existing MyBCW customer accounts will not be migrated to BenefitsCal. Customers will need to create a new account in BenefitsCal to access case information
- Customers will not be able to login using their existing MyBCW login credentials on BenefitsCal after the cutover
- After the cut over, existing and/or brand-new MyBCW customers will be redirected to BenefitsCal from MyBCW site

# Customer Account Creation

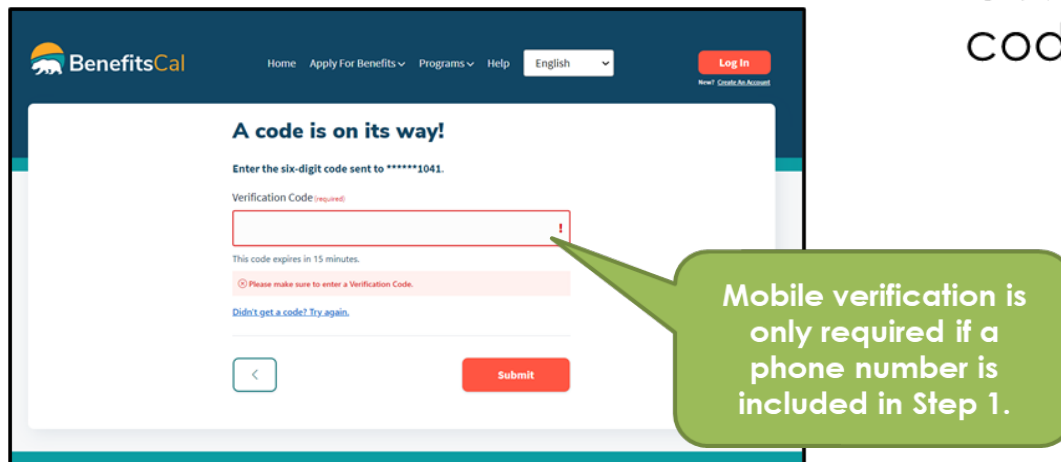
## Challenges customers have faced during account creation



The screenshot shows the BenefitsCal website's verification code entry screen. The header includes the BenefitsCal logo and a 'Log In' button. The main heading is 'A code is on its way!' followed by the instruction 'Enter the six-digit code sent to M\*\*\*d@mailinator.com.'. Below this is a 'Verification Code (required)' input field containing the number '460629'. A note states 'This code expires in 15 minutes.' with a link 'Didn't get a code? Try again.'. At the bottom, there is a back arrow and a 'Submit' button. A green callout bubble points to the input field with the text 'Email verification is required'.

### Challenges customers have with verification codes:

- Email and text codes go to spam folder
- There's a delay with Customer ISP message delivery
- Customers swap the email and text codes
- Customers use expired codes



The screenshot shows the BenefitsCal website's verification code entry screen. The header includes the BenefitsCal logo, navigation links (Home, Apply For Benefits, Programs, Help), a language dropdown set to 'English', and a 'Log In' button. The main heading is 'A code is on its way!' followed by the instruction 'Enter the six-digit code sent to \*\*\*\*\*1041.'. Below this is a 'Verification Code (required)' input field which is empty and has a red border and an exclamation mark icon, indicating an error. A note states 'This code expires in 15 minutes.' with a link 'Didn't get a code? Try again.'. At the bottom, there is a back arrow and a 'Submit' button. A green callout bubble points to the input field with the text 'Mobile verification is only required if a phone number is included in Step 1.'.

**BenefitsCal verification code guide:** [BenefitsCal FactSheet Verification Codes.pdf](#)

# Create a Customer Account

## Feature Highlights and Usability Testing Insights

Here are some quotes from usability testing:

“Well actually **if you provide an email address if you forget your password**, it will send a reset password in our email, so it is **not a bad idea.**” – Customer

“**Sometimes we forget what [security] question we put...** If we select from the dropdown list, then we don't have to remember... it is good to have the dropdown list.” - Customer

“If you click on the 'eye' it will show a star, if you want to see the password and you click it again you can see the password... **It is good to have it there because sometimes one person may type it several times, but they can't log in.** If they can see what they typed, they can see where they made the mistake. **It is good to have there.**” – Customer



# Demo: Apply for Benefits

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# Applying for Benefits

## Key Updates

Good to know...

### Here are some key updates:

- Customers can still apply in anonymous-mode (without an account)
- Available in 20 languages:
  - Spanish, Armenian, Khmer (Cambodian), Chinese, Hmong, Korean, Lao, Portuguese, Russian, Tagalog, Vietnamese, Arabic, Farsi, Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian, English
- No pin required to electronically sign
- New application summary with all content from the application (in printer-friendly mode)
- Nudges for info (e.g. SSN, Income), Sentiment Checks
- Uploaded Documents are sent to CalSAWS near-real-time

# Applying for Benefits

## FAQs

**Q: Will other members of the household be able to see program information (beyond the primary applicant) if they have set up an account in BenefitsCal?**

A: No, if they are not a primary applicant on a program, of a case then they cannot see the case information.

**Q: Is there a new mobile app to use?**

A: BenefitsCal is a mobile-responsive website, there is no app to download from an app store. The current MyBCW mobile app for wave 4 counties will longer be available starting 07/03/23.

**Q: When will documents in BenefitsCal be available to download?**

A: Near-real time, very fast.





# Review: Student-Based Application



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# Student-Based Application

## The follow is new functionality on BenefitsCal

- Adds two new screens to the Apply for Benefits flow
  - Are you a college student?
  - CalFresh student exemption questions
- The question “Are you a college student?” will “turn on” the student-based application
  - Collects the same information on the SAW2+
  - On-screen text is tailored to the student experience
- CalFresh student exemption questions are included on the app summary PDF

# Apply for Benefits

## Feature Highlights and Usability Testing Insights

Here are some quotes from usability testing:

“Oh, I like these icons [on the sentiment check]... I like it. **It's my favorite so far.** It's checking in right away to say how are you feeling about this... like **no matter what I pick we're going to be fine we're going to do it together.**” – Customer

“I liked that there aren't all different places that I might click. For the most part **seems pretty clear on where I'm supposed to go.**” – Customer

“I like that there **aren't a lot of questions on each screen.**” – Customer



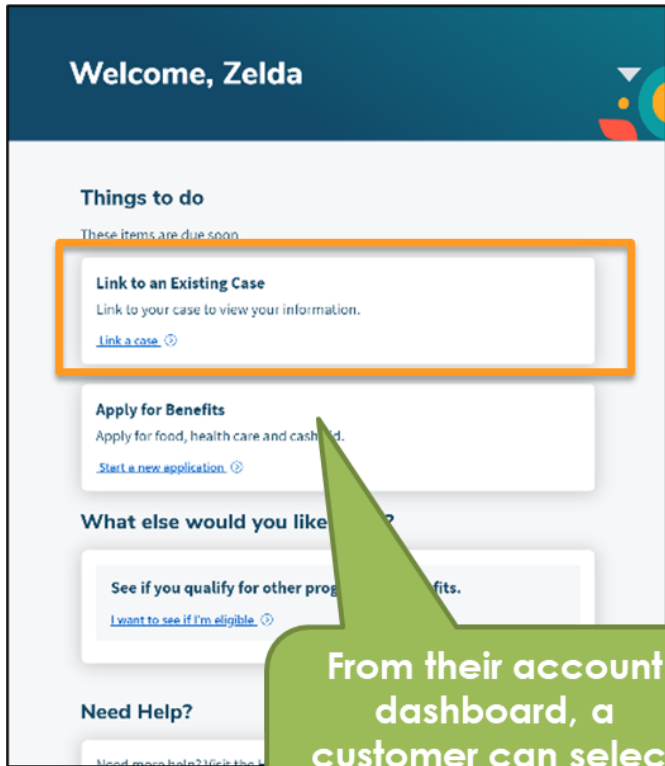
# Demo: Renewal/Recertification



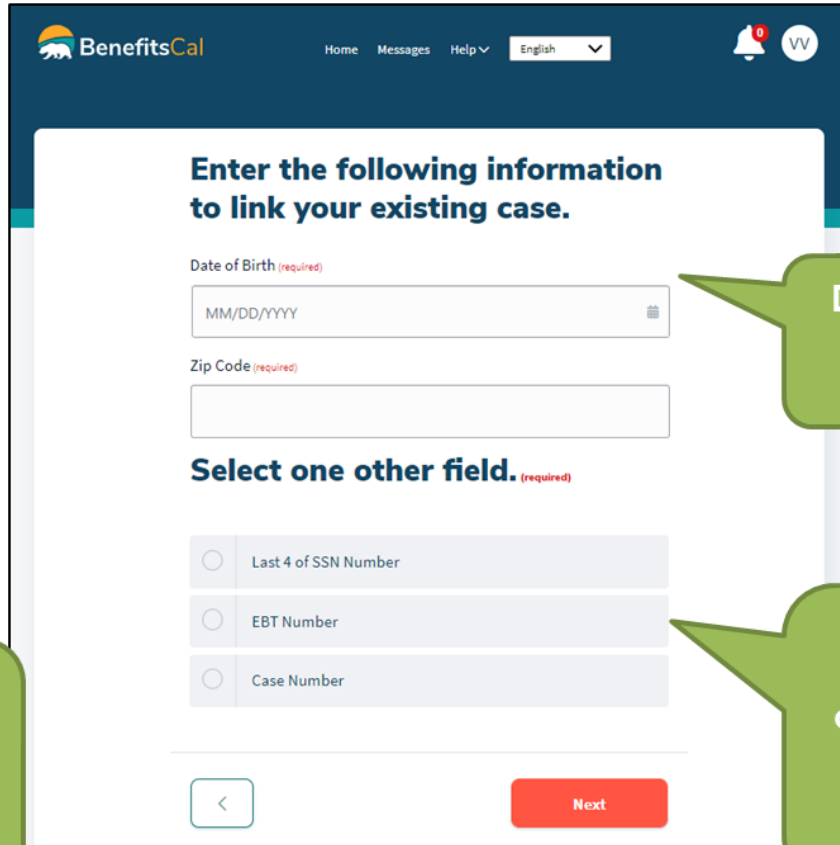
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# Customer Account

## Link a Case



From their account dashboard, a customer can select "Link to an Existing Case"



DOB and Zip code are required

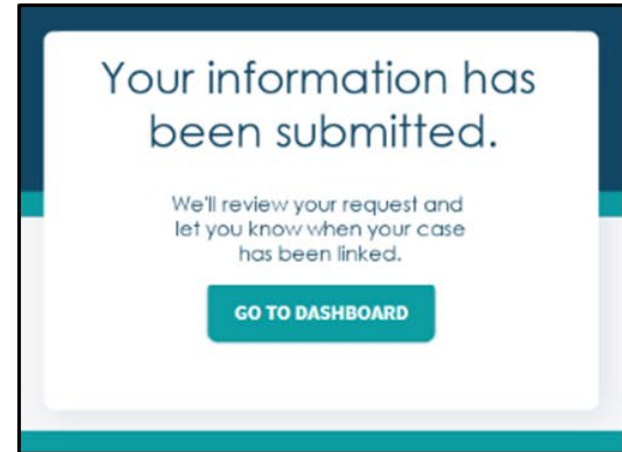
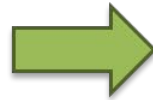
One of the following is also required:  
-Last 4 of SSN  
-EBT Number  
-Case Number

# Customer Account – Link a Case

The following describe why a customer may not see their case details after entering accurate case information.

- Case information won't be immediately available if...

- It's marked private
- CalSAWS automated process cannot determine the unique person to link to (e.g. duplicate records)



- Case can't be linked if the customer is...

- out of the home
- not on the case
- not the primary applicant on any program on the case

- **BenefitsCal Case Link guide:** [BenefitsCal FactSheet Case Linking.pdf](#)

# Renewal/Recertification

## Key Updates + FAQs

Good to know...

### Here are some key updates:

- Data is prepopulated for Medi-Cal renewals.
- Customers with a linked case will be nudged to complete their Renewal/Recertifications before it's due.
- Usability changes enhancements include help text, explanation of deadlines, nudges for important information, etc.

# Renewal/Recertification

## Feature Highlights and Usability Testing Insights

Here are some quotes from usability testing:

“It’s **pretty easy and straight forward**. It pretty much told us exactly what to do.”  
– Customer

“It is convenient.  
**I took a photo, uploaded it, and it successfully uploaded.** I didn’t have to change the file size! Perfect!”  
– Customer

“**I would feel good knowing I did it right.** Whenever, I left the other website I was always thinking in the back of my mind, ‘Did I do it right?’”  
– Customer





# Review: Support Request



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# Support Request

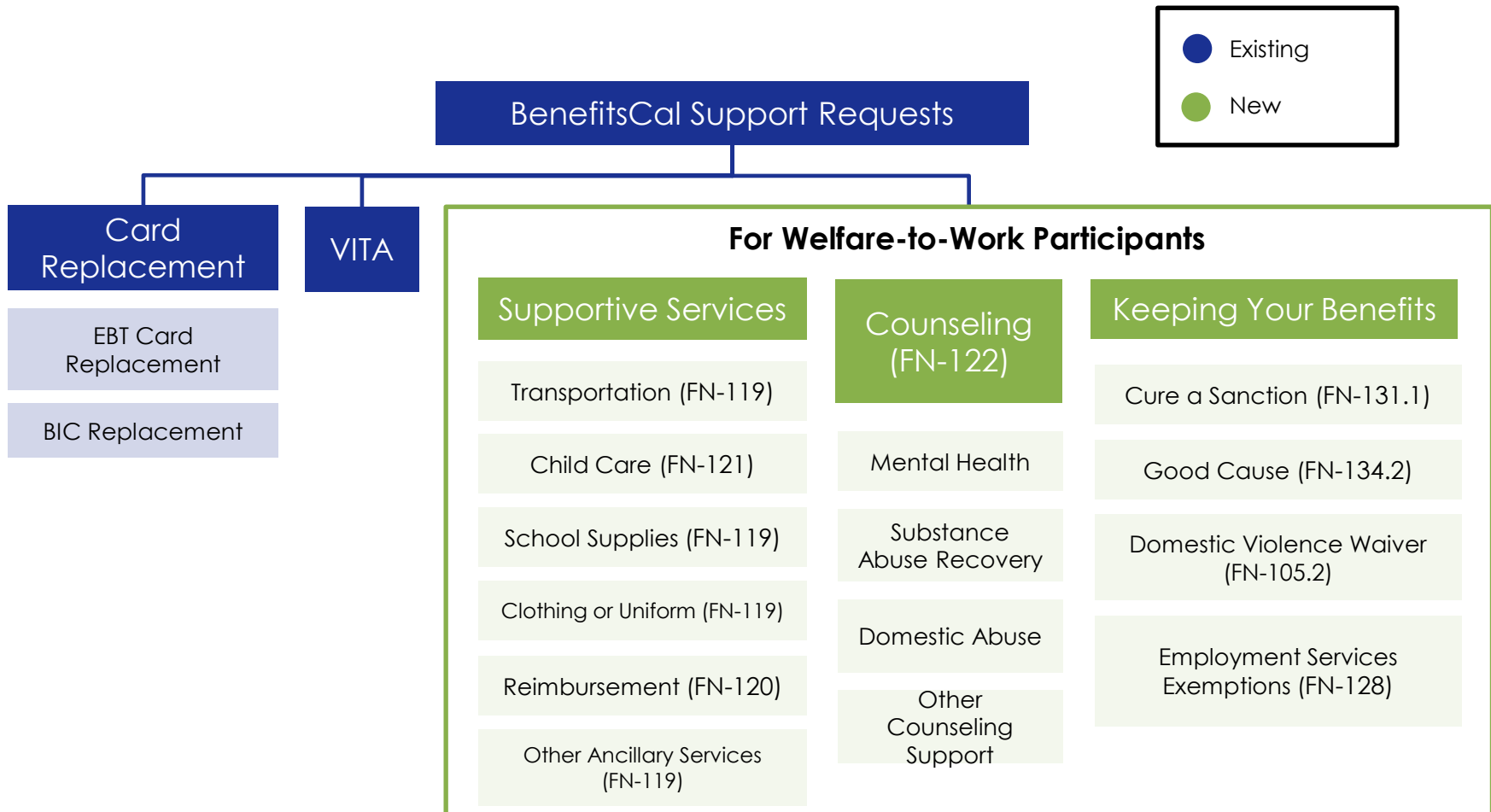
## Key Updates

Good to know...

### Here are some key updates:

- Card replacement requests are opt in/out but only display if the case has the relevant programs (e.g. Medi-Cal for BIC replacement)
- VITA is opt in/out functionality. If a county opts in, VITA only displays during tax season.
- WtW support requests only display if the case includes WtW.
- WtW support requests all fields are mandatory.

# Support Requests Overview



# Support Requests Business Process

## Wireframes

**Support Requests**

[View Support Request History >](#)

What do you need support with?

- Benefits Card Replacement** >  
I need help replacing a my EBT card or BIC card.
- State and Federal Tax Returns** >  
I need help filling your Federal and State tax returns with the Volunteer Income Tax Assistance Program (VITA).
- Supportive Services** >  
I need help to pay for child care, transportation, books or school supplies, work equipment.
- Counseling** >  
I need help with mental or physical well-being, substance abuse or domestic violence.
- Keeping Your Benefits** >  
I need help to keep getting my benefits, like curing a sanction or requesting exemptions if I cannot meet program requirements.




## Design

- Only customers who are required/volunteer to participate in the Welfare-to-Work program will see the 3 new categories in their dashboard.

# Support Requests Tasks in CalSAWS

## CalSAWS Support Request Tasks

- Support Requests will generate Tasks in CalSAWS

<input type="checkbox"/>		<a href="#">12/21/2022</a>	<a href="#">K200E08</a>	Francesca Alred	WT	Self Service Portal Communications	Supportive Service Request	Assigned	36LS28XI00	<a href="#">Complete</a>	<a href="#">Edit</a>
<input type="checkbox"/>		<a href="#">12/21/2022</a>	<a href="#">K200E08</a>	Francesca Alred	WT						
<input type="checkbox"/>		<a href="#">12/21/2022</a>	<a href="#">K200E08</a>	Francesca Alred	WT						

### Task Detail

Result 10 of 1 - 10

[Help](#)

[Start Watching](#)
[Edit](#)
[Print](#)
[Close](#)

*\* - Indicates required fields*

<b>Case Number:</b> <a href="#">K200E08</a>	<b>Case Name:</b> Francesca Alred	<b>Program(s): *</b> Welfare to Work - Tucker Alred	<b>Status:</b> Assigned	<b>Reference Number:</b> *
<b>Category: *</b> Self Service Portal Communications	<b>Type: *</b> Retention of Benefits Support Request	<b>Sub-Type:</b>	<b>Priority:</b> Medium	<b>Expedited:</b> No
<b>Due Date: *</b> 12/21/2022	<b>Date Created:</b> 12/16/2022	<b>Worker Assigned Date:</b> 12/16/2022	<b>Start Date:</b>	
<b>Assign to Program Worker:</b> Yes	<b>Worker ID:</b> 36LS28XI00	<b>Bank ID:</b>	<b>Automated Action:</b> <a href="#">Yes</a>	

**Long Description:**

A request for Retention of Benefits has been received through the Self Service Portal Support Request Type: ES  
 Phone: 8529637412  
 Message me in my BenefitsCal account: No  
 About the situation: Keeping your benefits.

# Support Requests Tasks in CalSAWS

## Wireframes

**1**

BenefitsCal 12

< Back to Help Center

### Forms

Find, download, and print forms for your case.

What can we help you find?

**Student Financial Aid Statement Welfare-To-Work Supportive Services (WTW 8)**

Welfare-to-Work

[Download](#)

**Permanent Housing Search Document (CW 74)**

CalWORKs, Homeless Assistance

[Download](#)

**Request For Good Cause Determination (WTW 27)**

CalWORKs, Welfare-to-Work

[Download](#)

**2**

BenefitsCal 12

### Upload Document

Upload file(s) for one case/application, person, and document type at a time. This helps us to track the files you upload.

First, enter the details about the file(s) you are uploading. Then, choose your file(s).

Case or Application Number (required)

- Select One -

Person (required)

- Select One -

Document Type (required)

- Select One -

- WTW8 - Student Financial Aid Statement Welfare-To-Work Supportive Services
- CW74 - Permanent Housing Search Document
- WTW 27 - Request For Good Cause Determination
- Job Search Form

CHOOSE A FILE

Each file cannot be more than 8MB.

How to get a good photo?

UPLOAD

## Design

- 1** Customer will be able to download form in the **Help Center** (WTW 8, CW 74, WTW 27)
- 2** Customer will be able to upload completed forms/documents with 4 new document types to select:
  - WTW 8 - Student Financial Aid Statement Welfare-To-Work Supportive Services
  - CW 74 - Permanent Housing Search Document
  - WTW 27 - Request For Good Cause Determination
  - Job Search Form



Demo: ROI

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# Open Q&A



# Survey

Closing our time together today...