CalSAWS |

Welcome to BenefitsCal:
Training for Community Based Organizations

May 25, 2023

Agenda

① Introductions (5 mins)
② Support materials (5 mins)
③ CBO Account Access (20 mins)
  - Converted accounts
  - New account request
  - Staff account creation
④ Demo: CBO Apply (15 mins)
⑤ Demo: CBO Dashboard (20 mins)
  - CBO Referral Campaign
  - Document upload
  - Reports
⑥ Release of Information (15 mins)
⑦ Help Features (5 min)
⑧ Open Q&A (20 mins)
⑨ Pulse Check

Introductions

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BenefitsCal – M&O

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BenefitsCal - Tester

CBO Awareness Training
Opportunities to learn about BenefitsCal

Today's Objective

- Set expectations for account conversion
- Demonstrate BenefitsCal functionality for CBOs
- Share reference materials

BenefitsCal test environment:

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

1. Access Key: ZEnomIqa])QWB67S031Fjq36MHgo
2. Please note: UAT access key gets refreshed every 2 months.
3. Do not use real data, if you need a fake email address, use mailinator.com

CBO Awareness Training
Opportunities to learn about BenefitsCal

BenefitsCal Test Data

- cbomanager_01@mailinator.com
  Password#1

- cbomanager_02@mailinator.com
  Password#1

- cbomanager_03@mailinator.com
  Password#1

Please note: These are dummy accounts and are not exclusive to a CBO organization. Data will be reflective of all users' activity performed using this account.

BenefitsCal
Training Material

- **BenefitsCal_Videos:** https://www.youtube.com/channel/UCCdgEsuQPysaAShiE-msz7Q
- **BenefitsCal_QuickRef_Guides:** Community Based Organizations (CBOs) Dashboard (calsaws.org)
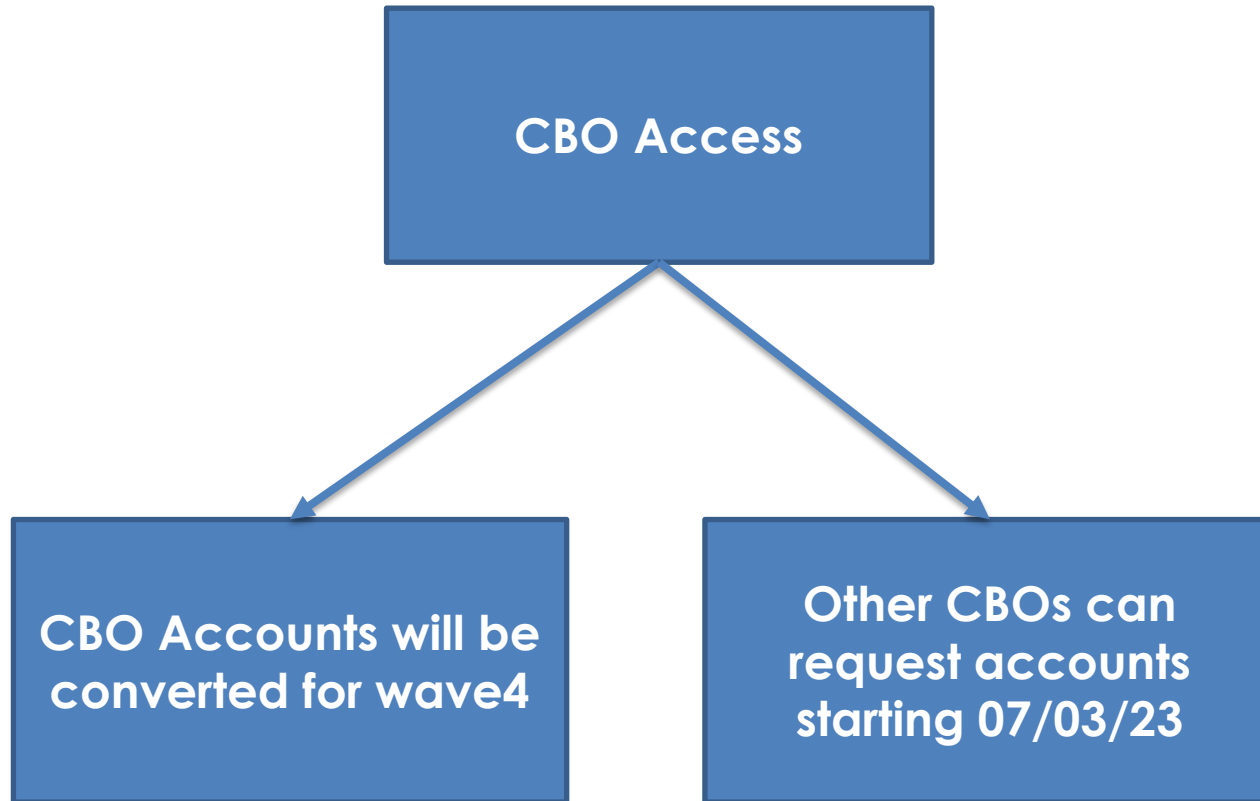
Available in YouTube today

8

Micro Videos

Available on CalSAWS.org

22

Quick Reference Guides

BenefitsCal
CBO Accounts

CBO Access

CBO Accounts will be converted for wave4

Other CBOs can request accounts starting 07/03/23

CBO Account Conversion – San Mateo

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 – Santa Cruz

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

1. Second Harvest Food Bank Santa Cruz County
2. Health Services Agency
3. Community Bridges
4. Catholic Charities Diocese of Monterey
5. First Five Santa Cruz County
6. Salud Para La Gente
7. PVUSD Healthy Start Program
8. Santa Cruz Community Health Centers
9. Friends Outside
10. Code for America
11. Katz Cancer Resource Center
12. Downtown Streets Team
13. SSA Assisted-No Interview Required
14. Central Coast Center for Independent Living
15. Housing Matters
16. UC Santa Cruz
17. Housing for Health
18. Santa Cruz County Public Defender

CBO Account Conversion – San Diego
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
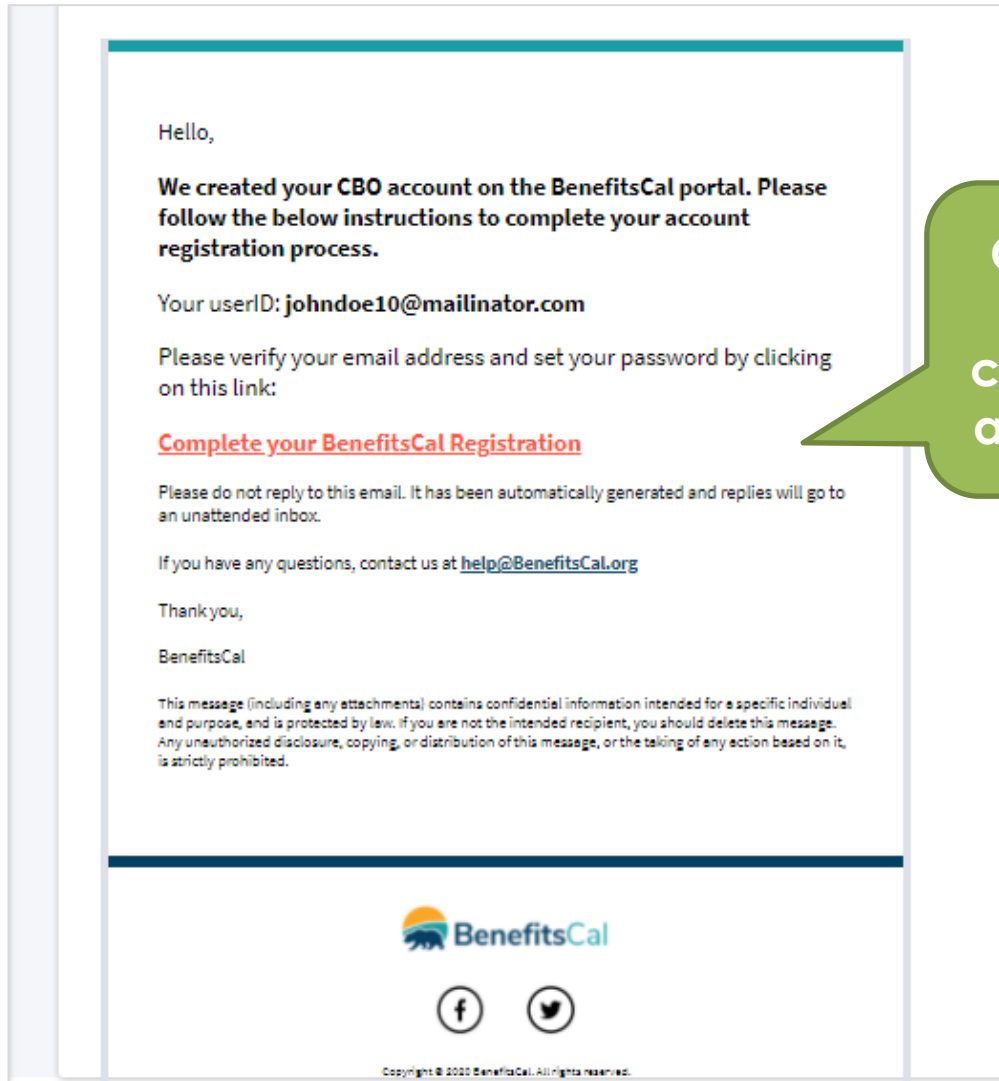
CBO Account Conversion – Solano

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

1. North Bay Healthcare Systems
2. Shamia Recovery Center
3. California Tribal TANF Partnership
4. Fairfield Housing Authority
5. Dream Catchers Empowerment Network
6. Solano County Office of Education
7. Vacaville FRC
8. Dixon Family Services
9. Fighting Back Partnership FRC
10. Christian Help Center
11. Solano Coalition for Better Health
12. Healthy Start FRC
13. Catholic Charities of Yolo-Solano
14. Benicia Family Resource Center
15. Genesis House
16. Its About My Baby
17. Unity Hall Recovery Community
18. A Place 2 Live Inc
19. Baby First Solano
20. Youth Family Services
21. Food Bank of Contra Costa and Solano
22. La Clinica de La Raza
23. Global Center for Success
24. Rio Vista CARE
25. Independent Living Resource 01
26. Solano County Outstation Unit

1. CalFresh Outreach Event
2. Code for America
3. Benicia Community Action Council
4. SF Dept of Public Health Transition and Placement
5. Community Medical Centers Inc
6. OLE Health
7. CommuniCare Health Centers
8. California Human Development
9. Solano County Behavioral Health
10. Napa Valley College
11. Planned Parenthood
12. SSA Assisted-No Interview Required
13. Area Agency on Aging Napa/Solano
14. North Bay Regional Center
15. Natividad Medical Center
16. Hamilton Families
17. Solano County WIC Program

BenefitsCal

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

Hello,

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

Your userID: johndoe10@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 us at help@BenefitsCal.org

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.

BenefitsCal

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Click this link to login and complete your account setup

BenefitsCal: Converted CBO Account

CBOs will be invited to complete their account setup

Enter new password

Enter security challenge Q&A

All set – login!

Demo: Create an Account

If your account is not converted, here's how you'll request an account on or after 07/03/23:

BenefitsCal
CBO Access Request Process

1	2	3	4
CBO Submits Access Request Form	County Reviews the Form	County creates the CBO Account	CBO receives email inviting them to login
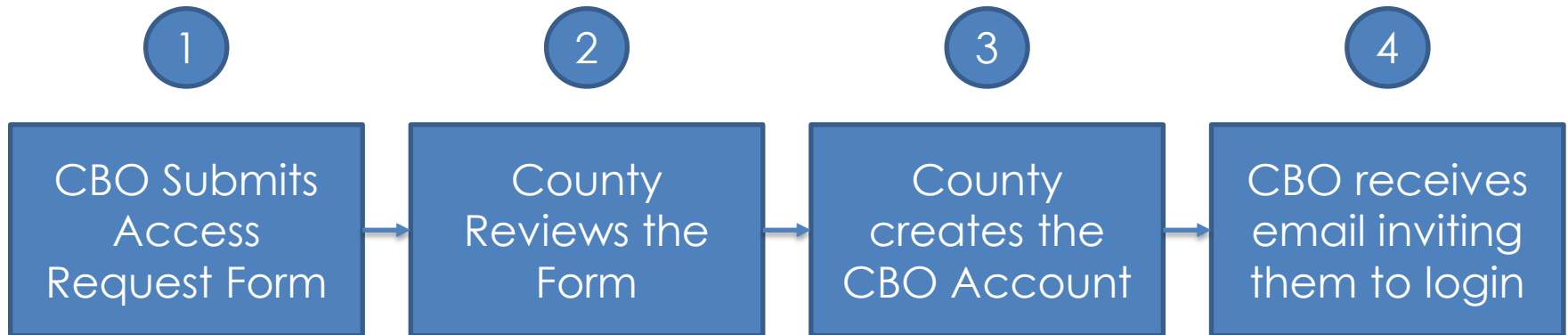
Considerations before you request a CBO Manager Account:

➢ A CBO Assister account can be created in real-time by a CBO Manager account.

➢ BenefitsCal CBO users who already have an account for use in another county, do not need a new account.

➢ BenefitsCal CBO accounts can submit applications for any county that has adopted BenefitsCal.

BenefitsCal: CBO Access
Manager v 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	
View Reports that include all applications for their staff	X	
Resume an application on behalf of their staff	X	
Add/Remove staff within their organization	X	
Create a referral campaigns	X	
View and track referral campaigns	X	X

BenefitsCal

If your account is not converted, you can request a CBO account to gain access to BenefitsCal, on this screen below:

Click Login

Select to Register Your CBO Account

BenefitsCal

Fill out the requested information to complete the access request

BenefitsCal

Once approved by the county, you'll receive an email inviting you to login to BenefitsCal, like this below:

Hello,

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

Your userID: **johndoe10@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 us at help@BenefitsCal.org

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.

BenefitsCal

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Request a CBO Account
Key Updates

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

As a CBO Manager you can add your own staff accounts (you do not need to request an account).

CBO Access

Managers can grant access to their staff

CBO Access

Managers can grant access to their staff

Fill out basic information on the Staff Member

Let's create an assister account.

First Name (required)

Last Name (required)

Email (required)

Mobile Phone

(###) ###-####

Address Line 1

Address Line 2

City

State

California

County

-Select One-

Zip Code

CREATE ASSISTER ACCOUNT

Click "create" and the Staff Member will get an email to login

Frequently Asked Questions (FAQs)
CBO Account Access

Q: Will my account be converted?

A: MyBCW active CBO accounts for wave-4 counties will be converted. Any new account (currently not existing in MyBCW) that is added to the conversion list by the county will also be converted

Q: Do I use my password for MyBCW to login?

A: No – the invitation email will help you to complete your account setup, which includes setting a new password.

Q: Do I need to request access in every County?

A: No, you only need to request access once. If you already have an account in BenefitsCal, you can continue to use the same account credentials across the counties.

Q: How long will it take to get access?

A: Access requests are processed by each County staff.

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.

Questions

Demo: Apply for Benefits

BenefitsCal: CBO
Begin a New Application

Start a New Application

Video

Apply for Benefits

BenefitsCal: How to **Resume an Application**

Select "In Progress" applications to finish and submit.

Click "In Progress" to review Draft Applications

Click "Continue" to resume the application

BenefitsCal: How to **Upload Documents after applying**

Select "Submitted" applications to finish and subm[it]

Click "Submitted" to upload more documents

Click "Upload" [to] upload m[ore] documen[ts]

Applications

1 In Progress — View

2 Submitted — View

0 Received — View

0 Processed — View

0 Not Accepted — View

Documents Needed

2 Applications Need Documents — View

New Application

View My Applications

< Back to Dashboard

Applications

Let's review your applications.

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

Filter

IN PROGRESS

Results (4)

Click "View Details"

Application Number
108471 — **View Details**

Last Name: **King**
First Name: **Pumpkin**

Application Status: Submitted
Action Items: 2 Documents Needed

Application Number
108988 — **View Details**

Last Name: **Anna**
First Name: **Apple**

Application Status: Submitted
Action Items: 2 Documents Needed

Application Details
112532

Application Details

First Name: **Derek**
Last Name: **Jones**
Date of Birth: ****/**/2001**
Application Date: 09/07/2021
Application Status: **Submitted**
Case Number: Not Assigned

Verification Details

Upload Needed
Application Date — 0 Days Ago

(i) **Photo ID/Social Security Card**
Derek Jones (20)

Upload

(i) **Citizenship Verification/Birth Certificate**
Derek Jones (20)

Upload

Upload History

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

You don't have any upload receipts at this time.

UPLOAD DOCUMENT

Frequently Asked Questions (FAQs)
Applications

Q: Can I track the status of the application after it's submitted?

A: Yes, right from the CBO dashboard – select to view the application for a status or export a report to excel. Please note: the application status will display; the ineligibility reason code will not display as it requires a Release of Information (ROI) form.

Q: Can I upload more documents after submitting the application?

A: Yes, access the previously submitted application and select to "upload documents" to upload more. CBO users can only upload for apps in "In Progress" or "Submitted" statuses.

Q: What if someone goes on vacation – who can help the client to complete their application?

A: CBO Managers can view all applications (including in progress) for all staff within their organization and can resume and complete an application for a resident.

Q: Can CBO users see the application summary for a customer?

A: A PDF application summary is only available to download on the confirmation screen, immediately after the application is submitted.

Q: Can CBO users see case numbers?

A: A CBO user can see the case number for CalFresh applications, submitted through their account, when the application is converted to case, which occurs around the time a county worker begins to process the application.

Questions

Demo: CBO Dashboard

CBO Dashboard: Manager

View Reports that include all apps for the organization

View all applications for the organization

Add/Remove Staff within their organization

Look at all you've accomplished!

You are on a roll!

0 You submitted 0 applications this month.

📋 **Staff Applications**

Manage your staff's applications.

View Staff Applications

📄 **Applications**   ⊕ **New Application**

0 In Progress   **View**

0 Submitted   **View**

0 Received   **View**

0 Processed   **View**

0 Not Accepted   **View**

Documents Needed

0 Applications Need Documents   **View**

View My Applications

📊 **My Reports**

View key metrics about application you've created and submitted.

0   0

Applications Submitted This Week   Applications Processed This Month

View Reports

👥 **Staff Management**

Manage your staff's information and BenefitsCal accounts.

Manage Staff

⊙ **Help & Resources**

📋   📞

Program Details   Contact County

View Help Center

CBO Dashboard: Staff

After logging in, this dashboard displays for CBO Staff users.

Navigation Menu

Applications

Reports

Help Resources

Frequently Asked Questions (FAQs)
CBO Account Access

Q: Will I be able to view applications submitted in MyBCW?

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

Q: Will I be able to upload SAR7 documents for clients?

A: Yes, if you have the customer's case number, you can upload a SAR7 form through document upload.

Q: When can we view more information about the application including the reason for denial (if applicable)?

A: A Release of Information (ROI) form is required to provide access to this information. This new functionality that will be available after May 2023.

Q: Who should we contact if we need help using the system?

A: Direct your questions to Ask CalSAWS.

Q: What data is included in CBO reports?

A: The export includes application number, programs, county, submission date, application status, and staff name (for CBO Managers only).

Questions

Review: CBO Referral URL

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.

Review: Release of Information

Demo: Help Features

BenefitsCal
Help Center

BenefitsCal
How-to Videos

Everything we covered today is included in this 15-minute video!

BenefitsCal
Quick Reference Guides

CalSAWS

News   Meetings ⌄   System Updates   **BenefitsCal**

Quick Reference Guides

Please see below for the BenefitsCal Quick Reference Guides for Community Based Organizations (CBOs) who do not have access to the Learning Management Solution (LMS). The CalSAWS Project is working to add a new screen to BenefitsCal to host CBO materials.

Quick Guide: Apply for Benefits
Quick Guide: CBO Referral Campaign
Quick Guide: Community Based Organization Request Access
Quick Guide: Create an Account for New Users
Quick Guide: Customer Dashboard
Quick Guide: Disaster CalFresh Benefits
Quick Guide: Electronic Benefits Transfer (EBT)
Quick Guide: Find Your Caseworker
Quick Guide: Link to Case
Quick Guide: Messages and Actions
Quick Guide: Opt into Electronic Notices
Quick Guide: Periodic Reporting
Quick Guide: Renewal
Quick Guide: Report a Change
Quick Guide: Request an Appointment
Quick Guide: Reset Password
Quick Guide: Student App
Quick Guide: Two-Step Verification
Quick Guide: Upload Documents
Quick Guide: Upload Documents within an Application
Reference Guide: Community Based Organizations (CBOs) Dashboard

Everything we covered today is included in this Reference Guide

Closing Q&A

Pulse Check

Appendix

Pre-go live Communications to Customers

BenefitsCal Pre-go-live Communication Plan

Communication	Description	Recipient	Distribution Date
Email 1	Information on upcoming transition.	Current active customers in MyBCW	05/25/2023
Email 2	Information on upcoming transition.	Current active customers in MyBCW	06/12/2023
Email 3	Email nudge to act on the unsubmitted applications in MyBCW.	Active customers who have filled in an app but not submitted an app with a look back period of 6 months	06/19/2023
SMS 1 (iOS and Android)	Information on upcoming transition.	Current active customers in MyBCW	06/13/2023
SMS 2 (iOS and Android)	Information on upcoming transition.	Current active customers in MyBCW	06/20/2023

- Email will be sent in English. Marketing site will be updated in 20 threshold languages
- SMS will be sent in English and Spanish.

MyBCW Pre-go-live Communication Plan

Communication	Description	Recipient	Distribution Date
Portal Announcement (Consortium Level)	Announcement (Indicating which counties are migrating) added as Yellow banner information provided in "Help/Read Me" section	All	June 2023
Portal Announcement (County Level)	Announcement (County Specific) added as Yellow banner information provided in "Help/Read Me" section	Migrating Counties	June 2023

Last day to use MyBCW for Wave 4 counties
Plan to submit applications early

**Submit applications in MyBCW
by Thursday, June 29th.**

**Start using BenefitsCal Monday,
July 03rd.**

First Day after cutover on MyBCW
Transitioned counties will be redirected to BenefitsCal

- Message indicating the county is no longer supported in MyBCW

- BenefitsCal redirect upon click of "Next"
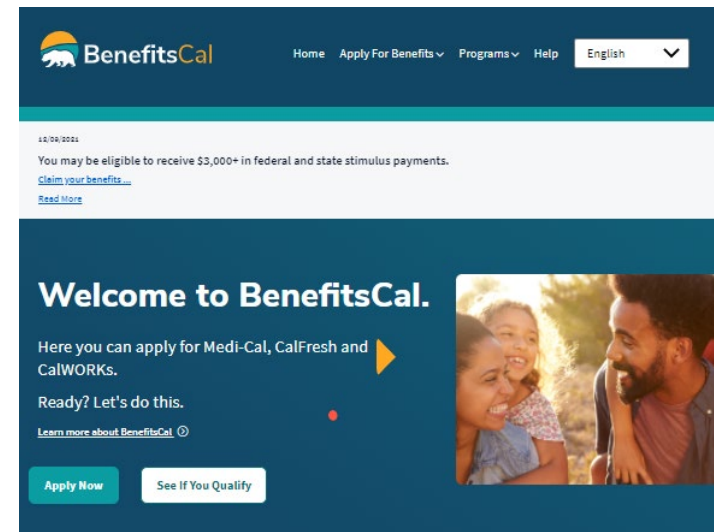
Go-live Communication

BenefitsCal post-go-live communication plan.

- Email and BenefitsCal Marketing site changes post go-live.

Channel	Communication Title	Description	Recipient	Distribution Date
Email	Go Live Announcement	Welcome email with list of resources available	Current active customers in MyBCW	07/03/2023