

CalSAWS |

Welcome to BenefitsCal:  
Training for Community Based Organizations



May 25, 2023

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# 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

## Bhargavi Lingamaneni

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: ZEnomlqaJ)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

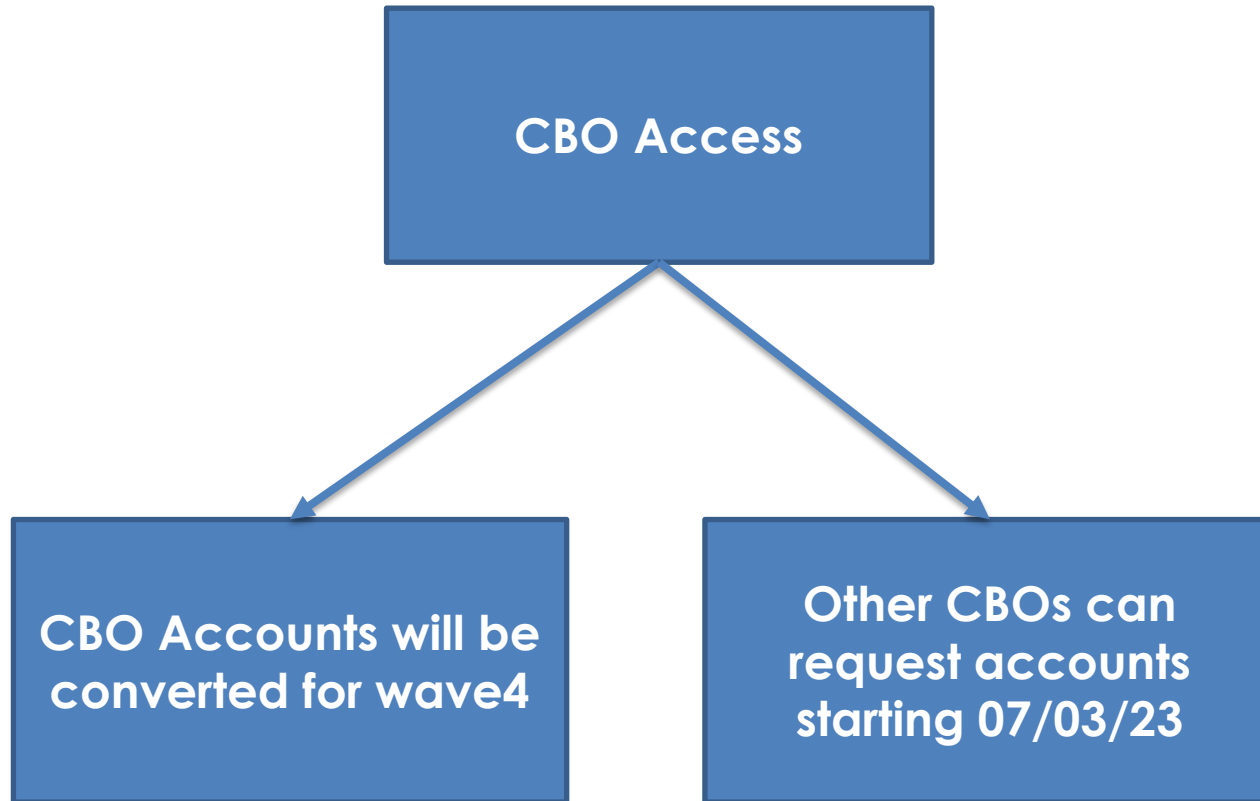
22

Quick Reference  
Guides

Available on  
[CalSAWS.org](#)

# BenefitsCal

## CBO Accounts



# 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

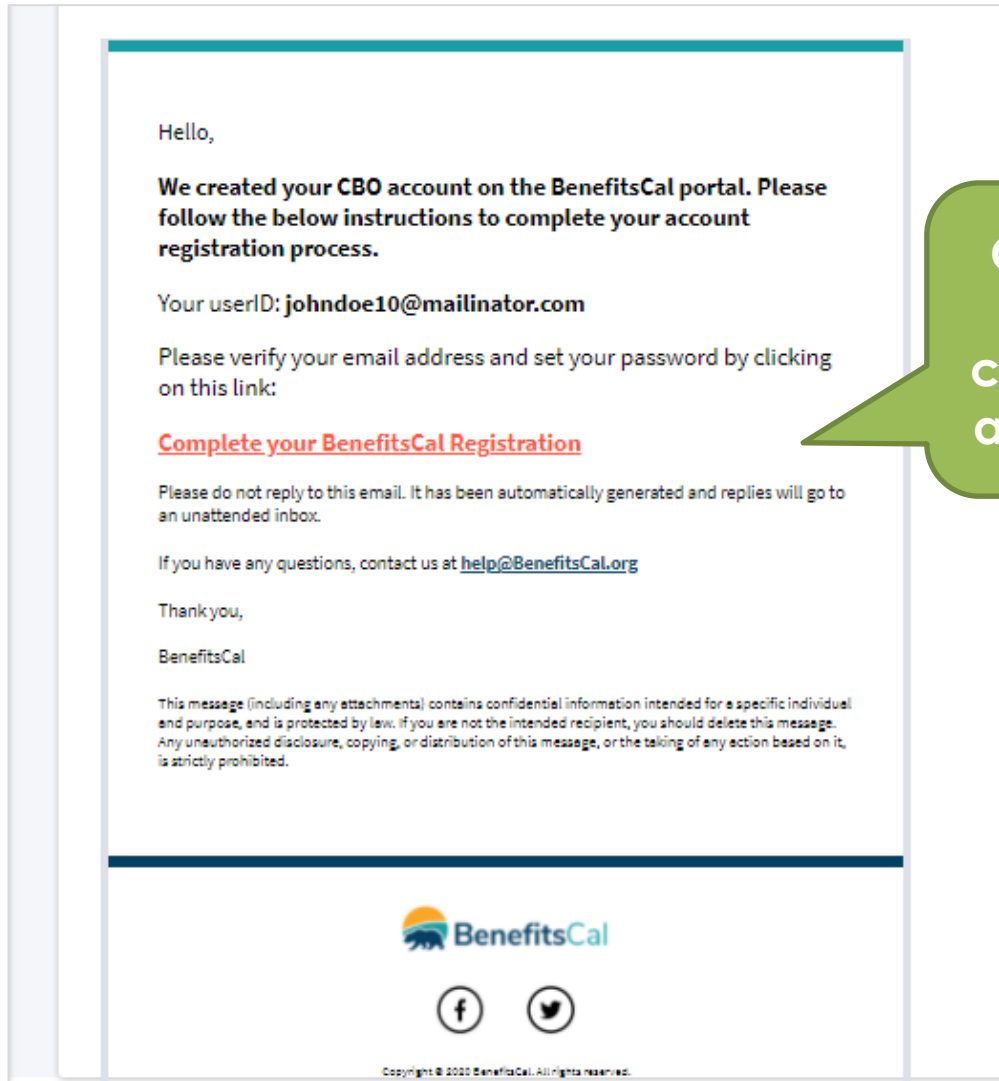
List of organizations where at least one CBO account will be converted

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:



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

Let's finish setting up your account.

New Password (required)

.....

It must include at least:

- ✓ 8 characters
- ✓ 1 number
- ✓ 1 letter
- 1 special character (!@#%&)

Re-Enter New Password (required)

.....

The two passwords should match.

< Save

Enter security challenge Q&A

BenefitsCal Log In

Now, let's set up a few questions in case you forget your password.

First Security Question (required)

What is your favorite color? ▾

Answer (required)

blue

Only include letters and numbers.

Second Security Question (required)

What is your favorite food? ▾

All set – login!

BenefitsCal Log In

Great!  
Your account is created!

LOG IN

Contact Us



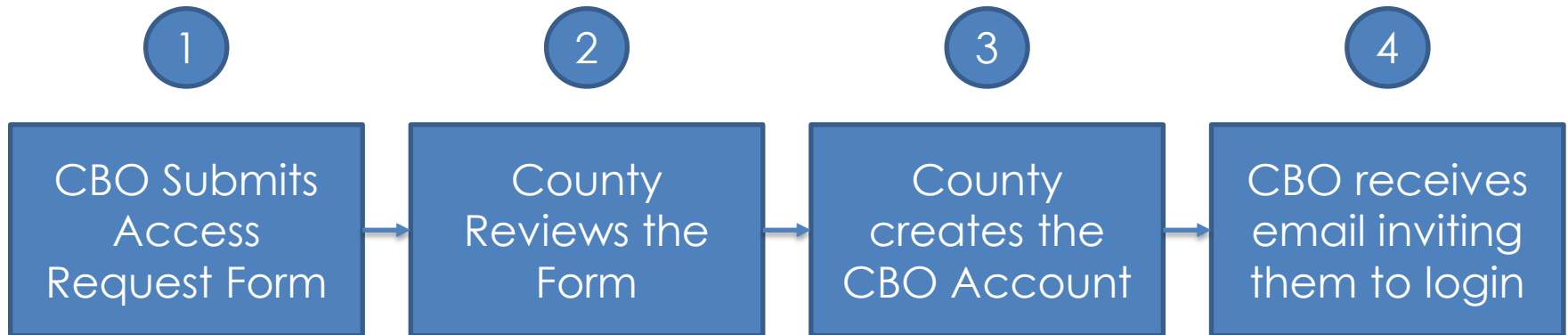
# Demo: Create an Account

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**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



### **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:

BenefitsCal

Apply For Benefits ▾ Programs ▾ Help & Resources English ▾ Log In

Use C4Yourself Login

**Log In**

Email (required)

Password (required)

[Forgot Your Password?](#)

Log In

**Create New Account**

An account let's you see your application status and easily renew your benefits.

Create Account

**Community Based Organizations (CBO)**

Help people apply for benefits and check their application status.

Register Your CBO Account

Click Login

Select to Register Your CBO Account

# BenefitsCal

Fill out the requested information to complete the access request

Fill out the requested information

**Register your Community Based Organization.**

Organization Name (required)

Primary Contact First Name (required)

Primary Contact Last Name (required)

Address Line 1 (required)

Address Line 2

City (required)

State

California

County (required)

-Select One-

Zip Code (required)

Mobile Phone (required)

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

Email (required)

I understand and agree to the [Terms and Conditions](#).

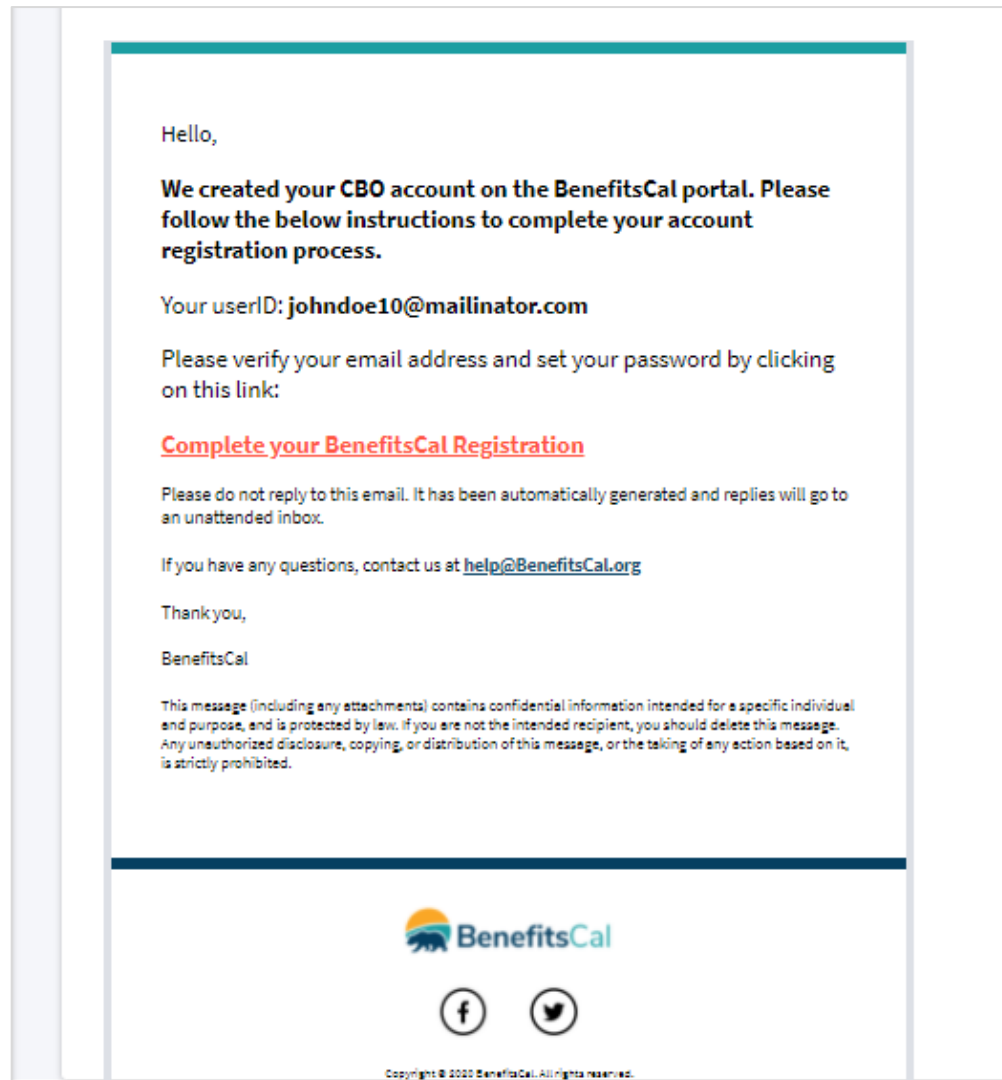
Register

Click the drop list and select the county you assist the most often

Click "register" to submit the request

# BenefitsCal

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



# 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

**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

Look at all you've accomplished!

### You are on a roll!

**1** You submitted 1 applications this month.

### Submit Documents

Upload documents for an application or case to any county.

[UPLOAD A DOCUMENT](#)

### Staff Applications

Manage your staff's applications.

[View Staff Applications](#)

### My Reports

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

**0** Applications Submitted This Week | **0** Applications Processed This Month

[View Reports](#)

### Applications

[New Application](#)

**4** In Progress [View](#)

**3** Submitted [View](#)

**1** Received

**0** Processed

**0** Not Accepted

**6** Applications Need Documents [View](#)

[View My Applications](#)

### Staff Management

Manage your staff's information and BenefitsCal accounts.

[Manage Staff](#)

### Help & Resources

[Program Details](#) | [Contact County](#)

[View Help Center](#)

**CBO Managers can add staff accounts in real-time**

**Click "Add Staff"**

BenefitsCal Home Applications nM

[Back to Dashboard](#)

### Staff Management

[ADD STAFF](#)

Staff Name: All

Staff Status:  Active  Inactive

pratcbo2 pratcbofirst2	<a href="#">VIEW</a>
FName LName	<a href="#">VIEW</a>
assistorReturns assistorReturns	<a href="#">VIEW</a>

# 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

County

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

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# BenefitsCal: CBO

## Begin a New Application

Look at all you've accomplished!

You are on a roll!

**2** You submitted 2 applications this month.

**Applications** [New Application](#)

<b>1</b> In Progress	<a href="#">View</a>
<b>2</b> Submitted	<a href="#">View</a>
<b>0</b> Received	<a href="#">View</a>
<b>0</b> Processed	<a href="#">View</a>
<b>0</b> Not Accepted	<a href="#">View</a>

**Documents Needed**

<b>2</b> Applications Need Documents	<a href="#">View</a>
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[View My Applications](#)

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

Look at all you've accomplished!

You are on a roll!



You submitted 2 applications this month.

Applications

New Application

1 In Progress

View

2 Submitted

View

0 Received

View

0 Processed

View

0 Not Accepted

View

Documents Needed

2 Applications Need Documents

View

View My Applications

Applications.

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

Filter

IN PROGRESS

SUBMITTED

RECEIVED

PROCESSED

NOT ACCEPTED

DOCUMENTS NEEDED

Results (2)

Application Number

[112534](#)

Continue

Last Name

Jane

First Name

Mary

Application Status

In Progress

Start Date

09/07/2021

Remove Application

Application Number

[112536](#)

Continue

Last Name

Mays

First Name

Mandy

Application Status

In Progress

Start Date

09/07/2021

Remove Application

# BenefitsCal: How to Upload Documents after applying

Select "Submitted" applications to finish and submit

Click "Submitted" to upload more documents

The screenshot shows a dashboard with a 'New Application' button at the top right. Below it is a list of application statuses, each with a 'View' button:

- 1 In Progress
- 2 Submitted
- 0 Received
- 0 Processed
- 0 Not Accepted

At the bottom, there is a 'Documents Needed' section showing '2 Applications Need Documents' and a 'View My Applications' button.

Click "View Details"

The screenshot shows the 'View Details' page for an application. It includes a 'Back to Dashboard' link, the title 'Applications', and a filter input field. Below the filter, there are two application cards:

**Application 1:** Application Number 108471, Last Name King, First Name Pumpkin, Application Status Submitted, Action Items 2 Documents Needed.

**Application 2:** Application Number 108988, Last Name Anna, First Name Apple, Application Status Submitted, Action Items 2 Documents Needed.

Click "Upload" to upload more documents

The screenshot shows the 'Application Details' page for application 112532. It includes a 'Back to Dashboard' link, the title 'Application Details', and a filter input field. Below the filter, there are two application cards:

**Application 1:** Application Number 112532, First Name Derek, Last Name Jones, Date of Birth \*\*/\*\*/2001, Application Status Submitted, Application Date 09/07/2021, Case Number Not Assigned.

**Application 2:** Application Number 112532, First Name Anna, Last Name Apple, Date of Birth \*\*/\*\*/2001, Application Status Submitted, Application Date 09/07/2021, Case Number Not Assigned.

Below the application cards, there is a 'Verification Details' section with two 'Upload Needed' items:

- Photo ID/Social Security Card (Derek Jones (20))
- Citizenship Verification/Birth Certificate (Derek Jones (20))

At the bottom, there is an 'Upload History' section and a large 'UPLOAD DOCUMENT' button.

# 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

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# CBO Dashboard: Manager

View all applications for the 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 Applications Submitted This Week
- 0 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](#)

View Reports that include all apps for the organization

Add/Remove Staff within their organization

# CBO Dashboard: Staff

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

The screenshot shows the BenefitsCal dashboard for a staff user named Jane. The dashboard is divided into several sections:

- Navigation Menu:** Located at the top, it includes the BenefitsCal logo, navigation links for Applications, Reports, and Help & Resources, a language dropdown menu set to English, and a user profile icon labeled JD.
- Personalized Greeting:** A dark blue banner at the top right says "Hi, Jane".
- Accomplishments:** A section titled "Look at all you've accomplished!" features a "You are on a roll!" card with a gear icon and the text "You submitted 0 applications this month."
- Applications:** A central section titled "Applications" with a "New Application" button. It lists application statuses: In Progress, Submitted, Received, Processed, and Not Accepted, each with a "View" button. Below this is a "Documents Needed" section with "Applications Need Documents" and a "View" button. A "View My Applications" button is at the bottom.
- My Reports:** A section titled "My Reports" with the subtitle "View key metrics about application you've created and submitted." It shows two metrics: "Applications Submitted This Week" and "Applications Processed This Month," both with gear icons and the number 0. A "View Reports" button is below.
- Help & Resources:** A section titled "Help & Resources" with icons for "Program Details" and "Contact County." A "View Help Center" button is at the bottom.

Four green callout boxes highlight these sections: "Navigation Menu" (top left), "Applications" (middle left), "Reports" (middle right), and "Help Resources" (bottom right).

# 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

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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.



# Review: Release of Information

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# Demo: Help Features

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# BenefitsCal

## Help Center

The screenshot shows the BenefitsCal Help Center interface. At the top, there is a dark blue header with the BenefitsCal logo on the left, navigation links for 'Applications', 'Reports', and 'Help & Resources' in the center, a language dropdown menu set to 'English' on the right, and a user profile icon labeled 'ff' in the top right corner. Below the header is a teal horizontal bar. The main content area is titled 'Help Center' and features a list of six help topics, each in a white card with a light gray shadow. Each card includes an icon, a title, a brief description, and a right-pointing chevron arrow.

- Frequently Asked Questions (FAQs)**  
Get answers to common questions about applications, benefits, and more.
- How to Apply for Benefits**
- Program Rules**  
Know your rights and responsibilities when applying for benefits.
- Program Descriptions**  
Learn about each program including how to qualify and the papers you need.
- Acceptable Documents for Verification**  
Learn more about required papers you may need to upload for verification.
- Learning Tools**

# BenefitsCal

## How-to Videos

The screenshot shows the BenefitsCal YouTube channel page. At the top left is the BenefitsCal logo, which features a stylized bear silhouette. To the right of the logo is the channel name 'BenefitsCal' and a red 'SUBSCRIBE' button. Below the logo are navigation tabs for 'HOME', 'VIDEOS', 'PLAYLISTS', 'COMMUNITY', 'CHANNELS', and 'ABOUT'. A search icon is located to the right of these tabs. The main content area is titled 'Uploads' and includes a 'SORT BY' dropdown menu. A grid of video thumbnails is displayed. A green callout bubble with white text says 'Everything we covered today is included in this 15-minute video!'. The video 'BenefitsCal: Community Based Organizations' is highlighted with a red rectangular box. Below the grid, there are two more video thumbnails: 'How to Reset Your Password' and a video showing a woman and a man with text overlays: 'Submit Applications', 'View CBO Dashboards', and 'Create & Manage CBO Accounts'.

BenefitsCal

HOME VIDEOS PLAYLISTS COMMUNITY CHANNELS ABOUT

Uploads SORT BY

Periodic Reporting 4:26

BenefitsCal: Periodic Report (SAR7) 624 views • 3 months ago

Dis Co

BenefitsCal: D CalFresh 175 views • 3 months ago

di-Cal Renewals 6:17

BenefitsCal: How to submit a Cal renewal. 1.3K views • 3 months ago

BenefitsCal: How to Link an account to your case 1:36 398 views • 4 months ago

How to Create an Account 2:19

BenefitsCal: How to create an account 627 views • 4 months ago

Community Based Organizations 15:30

BenefitsCal: Community Based Organization (CBO)... 1.4K views • 5 months ago

How to Apply for Benefits 3:08

BenefitsCal: How to apply for benefits 3.1K views • 5 months ago

How to Report a Change 2:46

BenefitsCal: How to report a change 2.3K views • 5 months ago

How to Upload a Document 2:14

BenefitsCal: How to upload a document 5.9K views • 5 months ago

How to Link a Case 1:36

BenefitsCal: How to link a case 7.4K views • 5 months ago

Customer Dashboard Overview 3:57

BenefitsCal: Customer Dashboard Overview 954 views • 5 months ago

How to Reset Your Password

Submit Applications  
View CBO Dashboards  
Create & Manage CBO Accounts

### 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



The Road to CalSAWS



# Pre-go live Communications to Customers

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# 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 29<sup>th</sup>.**

The screenshot shows the MyBenefits CalWIN website. At the top left is the logo. A yellow banner contains an announcement: "All Transitional Nutrition Benefit (TNB) Recipients! Your TNB benefits will continue for 2 years beginning November 2021. [Sustained](#) This recertification for 24 months". Navigation links include "Sign In", "Help", "FAQs", "Contact", and "Language". The main content area features a large image of diverse children with the text: "Get medical, food and cash assistance now. MyBenefits CalWIN is the fast, easy way for California residents to get the help they need." A "Create An Account" button is visible. A "Welcome Back!" overlay with a "Sign In" button is also present. Below this, a section titled "I would like to..." offers four options: "See if I Am Eligible" (with a checkmark icon), "Apply for Benefits" (with a document icon), "Report Changes" (with a document icon), and "Renew Benefits" (with a calendar icon). Each option includes a brief description of the service. At the bottom, there is a section for "Check out our videos to learn more." with a partial image of a person's face.

The screenshot shows the BenefitsCal website. The top navigation bar includes the logo, "Home", "Apply For Benefits", "Programs", "Help", and a language dropdown set to "English". A date "06/09/2021" is displayed. A message states: "You may be eligible to receive \$3,000+ in federal and state stimulus payments. [Claim your benefits...](#) [Read More](#)". The main banner features the text "Welcome to BenefitsCal." and "Here you can apply for Medi-Cal, CalFresh and CalWORKs." A "Ready? Let's do this." prompt is followed by a "Learn more about BenefitsCal" link. Two buttons are present: "Apply Now" and "See If You Qualify". On the right side of the banner is a photograph of a smiling family.

**Start using BenefitsCal Monday,  
July 03<sup>rd</sup>.**

# First Day after cutover on MyBCW

Transitioned counties will be redirected to BenefitsCal



[Sign In](#) | [Help](#) | [FAQs](#) | [Contact](#) | [Language](#)

[Home](#) **MyBenefits CalWIN Account**

You have selected a County not served by MyBenefits CalWIN.

Visit BenefitsCal for more information.

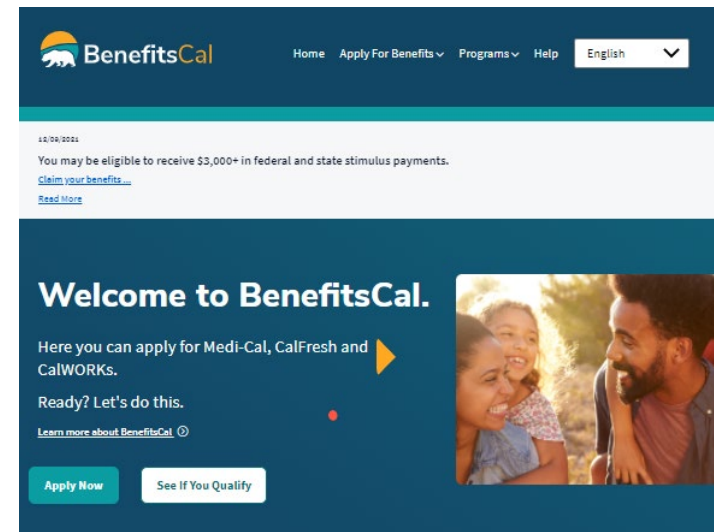
[Next](#)

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- 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