



SAN FRANCISCO
HUMAN SERVICES AGENCY

BenefitsCal Client Accounts: For CBOs and Other Partner Agencies

SFHSA Community Engagement Team



Agenda



- BenefitsCal Basics
- Customer Accounts
 - Linking an account to a case provides the most features
- BenefitsCal FAQs
- Resources

BenefitsCal Basics



BenefitsCal is the secure, user friendly, self-service website for all Californians to apply for and manage benefits. It collects information from clients and Community Based Organizations (CBOs) on behalf of CalSAWS. Clients can track and manage their CalFresh, Medi-Cal, General Assistance/General Relief and CalWORKS benefits and services anytime they want, 24/7!

BenefitsCal eliminates the need for clients to travel to an office or wait on the phone for many services

Viewable in 20 Languages



BenefitsCal Inicio Solicitar beneficios Programas Ayuda

Inicio

¿Nuevo? [Crear una cuenta](#)

Buscar 🔍

01/23/2024

BenefitsCal System Maintenance
Thursday, January 25th, 2024 from 8:00pm to 9:30pm
[Leer más](#)

[Ver más anuncios y actualizaciones](#)

Le damos la bienvenida a BenefitsCal

Estamos aquí para apoyarlo con los beneficios de alimentos, ayuda en efectivo y cobertura de salud.

¿Qué quiere hacer hoy?

[Solicitar beneficios](#)

[Administrar mis beneficios](#)

Drop-down menu with language options on the home page

It's Easy to Create An Account



To create an account, the client will need to enter:

- County where they are living
- First and last name
- Email address
- Phone number (optional)

Then they will be prompted to:

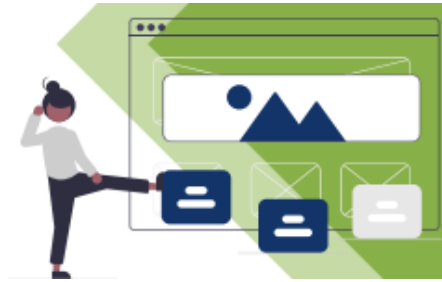
- Create and confirm a password
- Check two boxes related to text messaging and terms/conditions

Customer Dashboard

The Customer Dashboard is the first screen after signing into a BenefitsCal.com account

Sections of the Customer Dashboard:

- **Things to Do:** Displays what items are due soon (e.g., uploading a document)
- **What else would you like to do?** Common actions are listed for reference
- **Your Application and Cases:** Displays the status of an open application and/or open case
- **Need a Benefit Verification Letter?** Download one!



Why use BenefitsCal.com?

- Reduce county office trips
- Easy to use website
 - Check eligibility, get program information, download and print common state forms, and find help from nearby offices
- Easily apply for benefits
- Upload Documents
 - On user dashboard, click on ‘Upload a Document’
 - Enter document details
 - Click ‘Select File’
 - Review document details
 - Click ‘Select Files’ and choose a document
 - Click ‘Upload Document’
 - Save confirmation receipt



Need help? Don't worry!
Robin says,
“Visit **BenefitsCal.com!**”

Linking An Account



Linking their BenefitsCal account to their case is the best way for clients to get the most out of the BenefitsCal system.

The client can link their case once they log in to their BenefitsCal account. They will be prompted to enter:

- Date of Birth
- Zip Code
- Two of these: SSN, EBT Number or Case Number

When the case is successfully linked, the client's case info will appear on the right hand side of the client's BenefitsCal dashboard.

BenefitsCal Client Features



Things Clients Can Easily Do Within BenefitsCal	Without Account	With Account	Account + Linking
Apply for MC, CF, GA/GR, and/or CW and get a confirmation number	✓	✓	✓
Renew benefits for MC, CF, GA/GR and/or CW	X	X	✓
Track application & renewal status (linked account required for renewal status)	X	✓	✓
Get email or text reminders of upcoming deadlines	X	X	✓
Read notices that were also sent in the snail mail	X	X	✓
Upload case documents	✓	✓	✓
Report and send info about changes in household or circumstances	X	X	✓
View case info including CF, CAAP and CW balances and program status	X	X	✓
Replace lost or stolen BIC and EBT Cards	X	X	✓
Download Verification of Benefits	X	X	✓
Inform the County they would like to stop receiving benefits	X	X	✓
See FAQs and answers about a variety of public benefits topics	✓	✓	✓

BenefitsCal FAQs



BenefitsCal has several FAQ subsections. All 84 of the FAQs and their answers are viewable in the 20 supported languages!

A screenshot of the BenefitsCal website's FAQ menu, displayed in two columns. Each item consists of an icon, the text of the FAQ subsection, and a right-pointing chevron. The left column includes: General FAQs (wrench icon), Apply for Benefits FAQs (clipboard icon), Notifications & Messaging FAQs (bell icon), My Benefits FAQs (star icon), Document Upload FAQs (upload icon), and Renew Benefits FAQs (refresh icon). The right column includes: Report Changes FAQs (double arrows icon), EBT FAQs (ID card icon), Login/Create an Account FAQs (person icon), Other Resources FAQs (wrench icon), and Students FAQs (graduation cap icon).

- General FAQs
- Apply for Benefits FAQs
- Notifications & Messaging FAQs
- My Benefits FAQs
- Document Upload FAQs
- Renew Benefits FAQs
- Report Changes FAQs
- EBT FAQs
- Login/Create an Account FAQs
- Other Resources FAQs
- Students FAQs

FAQ Link: <https://benefitscal.com/Help/faqs/HCFQAQ>

More BenefitsCal Questions?



Here are some resources:

1. **BenefitsCal YouTube Channel:**
<https://www.youtube.com/channel/UCCdgEsuQPysaAShiE-msz7Q/videos>
2. **BenefitsCal Quick Reference Guides for CBO Users**
<https://www.calsaws.org/benefitscal-quick-reference-guides/>
3. **SFHSA BenefitsCal Information**
<https://www.sfhhsa.org/benefitscal>

Questions?



SAN FRANCISCO HUMAN SERVICES AGENCY

**Department of Benefits
and Family Support**

Thank you

www.sfhsa.org

