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

Drop-down menu with language options on the home page
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

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

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

FAQ Link: https://benefitscal.com/Help/faqs/HCFAQ
More BenefitsCal Questions?

Here are some resources:

1. BenefitsCal YouTube Channel: https://www.youtube.com/channel/UCCdgEsuQPysaASHiE-msz7Q/videos


3. SFHSA BenefitsCal Information https://www.sfhsa.org/benefitscal
Questions?
Thank you