BenefitsCal FAQ for CBOs
Answers will be updated as new information is received.

Update: January 2025

Acronyms

CBO - Community Based Organization
ROI - Release of Information
BC or BCal - BenefitsCal
UCD - User Centered Design
See also this "SAWS Glossary"

Resources

BenefitsCal resources

- BenefitsCal YouTube Channel
- BenefitsCal County Opt-in Features List *(last updated 04/25)*
- BenefitsCal Quick Guides **(***not updated regularly***)** *but include;*
  - CBO Referral Campaign
  - CBO Dashboard
- BC and CalSAWS Questions FactSheet **(***not updated regularly***)**
- BenefitsCal User Testing Environment
  - **Access Code**: TWqwdasv))POT98T232Has56uiLM
    - Contact Jenn if the code doesn't work as it is sometimes updated. She will try to get a current one.
  - How to Access the Demo Site Guide
- Desk Aids for CalSAWS, called County Information Transmittals, includes info about running reports and other information shared to counties
- CBO Technical Contact List by County

ROI resources

- BenefitsCal ROI FAQ
- ROI vs Authorized Representative Chart
- CDSS All County Letter on the ROI to CBOs in BenefitsCal
  - High-level summary of the ACL
- CDSS All County Letter to announce the release of the Applicant/Recipient's Authorization for Release of Information to Community-Based Organization in BenefitsCal (ABCDM 229)
- ABCDM 229 Form (English) (other threshold languages)

CalSAWS Advocates & Assisters Resources

- CalSAWS Advocates Newsletter Archives
- Tips for CBOs

- Request to be added to the CalSAWS Advocates group, User-Centered Design Meetings, and/or the CalSAWS Stakeholder Meeting List

CBO Account Functionality & Set Up

1. **Is there an Standard Operating Procedure for supporting a CBO to best set up a manager account?**
   No, we do not have this resource but here is a YouTube video that walks you through how to make a CBO account.
   Information to consider:
   - *A CBO can have multiple manager accounts, but they need to be differentiated in some way to the county (eg, Acme CBO - West location; or Acme CBO - Medi-Cal Team). Be sure to use a different name for your organization when requesting your manager account so the county can see it's not a duplicate request.*
   - *Assisters can only be assigned to one manager (per login email address)*
   - *Only the person who will be the manager of the CBO account should make a request. After the manager account is set up, they can add assisters. Assisters who will not be the account manager should not request an account.*

2. **How do I change my account to "Manager" if created as staff?**
   a. Contact your county's Delegated Admin (county tech support for CBOs) user to create a support ticket to add or adjust the type to CBO Manager.

3. **How long does CBO Account approval take place?**
   Counties are trying to process the requests within a few days, but sometimes it can take longer.

4. **When does the approval get sent to BenefitsCal for assister CBO accounts?**

The access request is reviewed by the county, which may take a few days. Once approved, the county will create your account and send an email with instructions to get started. (Youtube video on creating a CBO account)

5. **Does a CBO get a confirmation email when they submit their account request?**
   No.

6. **What happens if CBO does not complete the registration email?**
   Their CBO account will not be created.

7. **What is the role and permissions of the manager account?**
   Information about the manager accounts is available in the CBO quick guide here on pages 15-19

8. **How do I know if I have a manager or a staff account?**
   Manager accounts have access to more information:

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

9. **Does BenefitsCal have a locations option similar to MyBCW for CBOs with different physical sites?**

   No. Organizations need to decide how they want to set up their CBO account(s). There can only be one manager per account. See the questions below for options to consider.

10. **Best practice for an assister that moves between locations? One account under one manager?**

    Assister accounts are linked to individual email addresses. An assister moving between locations has two options

    a. Use a single account associated with their email address.
    b. Have two separate accounts with two separate email addresses defined by location and CBO manager in BenefitsCal.

11. **If an organization spans the state, can one site in one County apply as CBO manager, with assistor sites in different Counties?**

    Yes, however there can only be one manager of the account. Review responses to question 1 above to see considerations for setting up your CBO account.

12. **How many managers are allowed per CBO?**

    CBOs can have any number of manager accounts, but may need to explain to the county about why there is need for more than one (eg, multiple departments, locations, etc). However, the managers for each account can only see the assister accounts they create (see next question and response)

13. **How many managers are allowed per account?**

    One manager per account. Unlimited assisters can be added to that account. Managers can only see the assisters they create, and cannot see or manage assisters from other manager accounts in the same organization.

14. **If a CBO has multiple manager accounts can they be linked to show other manager accounts for that CBO?**

    No. There are only two "tiers" in the accounts: "manager" and "assisters" so there isn't a way for manager accounts to be linked or tied to a higher, third tier.

15. **Can one unique account offer access to multiple Counties (ie Higher Education)**

    Yes, however there can only be one manager of the account. Review responses to question 1 above for things to consider when setting up a CBO account.

16. **Can we apply to be CBO for all counties that we serve?**

    Yes. CBOs only need to apply *once* to *one* county *for each manager account* they want to have. Once the CBO manager account(s) are set up, they can add unduplicated assister accounts and begin submitting applications to any county that is using BenefitsCal. You do not need to apply for an account in more than one county because you only need one account to send applications to any county that is using BenefitsCal.

    For example, if a CBO applies for an account with Marin county, once they are approved they can help clients with applications in any other counties.

17. **Can an assister account exist without a manager account?**

    No, every assister account must be connected to a manager account. Manager accounts create the assister accounts.

18. **How do you remove an assister?**

    A manager can deactivate an assister account using the manager dashboard. See page 18 of the CBO Quick Guide or page 5 of our July 2024 CalSAWS Newsletter

19. **Can inactive assister account data still be downloaded?**

    Yes. Inactive account data is still available to the manager of the account.

20. **Can a CBO assister account be reassigned to a new CBO manager if a transfer happens?**

    a. CBO Assister accounts would need to have a data change at the project to move from one manager to another. In order to make this request, contact AskCalSAWS at CalSAWS.org.
    b. Right now, this transfer is not able to be done by the CBO. This would require processing time at the project and a technical team update.

21. How does a CBO manager reactivate their account?

Contact the Designated Administrator at the County level or contact AskCalSAWS at CalSAWS.org

22. How do we change CBO manager name?

Contact the Designated Administrator at the County level or contact AskCalSAWS at CalSAWS.org

23. How can we add a new manager and delete the prior manager?

Contact the Designated Administrator at the County level or contact AskCalSAWS at CalSAWS.org. This may require a new CBO account. Be prepared to download your data before making the request (or ask for it to be downloaded).

Technical Support (CBO and other)

24. If a client is experiencing a glitch or needs tech support who can they contact?

a. The client will need to contact the county and may be referred to the "tech help desk" through the county's contact center. If you are unsure if the client should contact the county or submit a CalSAWS for a specific issue, or look at the reference guide.

25. Do CBOs have access to technical support?

a. CBO Technical Contact List by County

System Features & Functionality

26. Will CBOs be notified for client's renewal?

The integrated ROI scheduled to be developed by the end of May 2023 was postponed, new launch is TBD. At that point, the client has an opportunity to submit a ROI, and decide data elements they would like to share with a CBO, including upcoming SAR 7 and renewal dates.

27. Will a CBO account allow me to do inter-county transfers (ICT)?

a. No, they can't directly request an intercounty transfer. However, a CBO can upload documents confirming a change of address, which should start the inter-county transfer process. Consumers can use their account to submit a change, including an address change, which should initiate the ICT process."

28. **Can CBOs submit a renewal (Medical and CalFresh) for a client on a CBO account?**
    a. CBOs can upload a Renewal for MediCal or CalFresh, however, CBOs are not able to submit an online renewal in place of the customer. Customers can complete the online renewal through their account.

29. **When submitting an annual redetermination, would that be in the “submit documents” section? Or applications?**

    When submitting an annual redetermination, you would go to the “submit documents” section.

30. **Is there an option to send an upload link to the customer? Or is the only option for assister to gather/scan the documents and upload here?**

    Currently, there is not an option for an upload link to be sent to the customer. But, anyone can upload a document on BenefitsCal without an account.

31. **Will there be CalSAWs Lite access for CBOs similar to CalWIN Lite/Read-Only access?**

    No. CBOs will not be able to access client information directly from CalSAWS. However, there is a requirement for BenefitsCal to develop an integrated ROI so that data can be populated into a CBO dashboard about their client’s cases and information.

What access may CBOs have once the integrated ROI is launched?

The integrated ROI, once launched (date TBD) should allow access to:

a. Notices of Action (NOAs)
b. · Verification Requests From Your County Worker
c. · Benefit Award
d. · Program Status - may include, but are not limited to active, denied, deferred, deregistered, discontinued, exempt, good cause, ineligible, non-compliance, pending, sanction, and waiting to transfer
e. · Termination Reason(s)
f. · Upcoming SAR 7 and Renewal Due Dates

32. **Will approval notices be noted on CBO account?**

    No. Currently there is no integrated Release of Information for client case details to be shared. The integrated ROI scheduled to be developed by May 2023 was postponed, new launch is TBD. You can get updates at the CalSAWS Stakeholder Meetings. Contact calsawsstakeholderengagement@dss.ca.gov to be added to their list for updates.

33. **Does BenefitsCal show the client's application status? Who can see the status of an application? Assisters or only managers?**
    a. Clients can see detailed status information about their applications using their own linked accounts.
    b. CBO assisters can only see general information at this time (until the integrated ROI is developed, see responses above regarding the ROI).
    c. Managers can see what their assisters can see.

34. **What do the status indications mean in the CBO dashboard for client applications?**

What CBOs see *<u>without</u>* a ROI in place for a client	**What CBOs can see *<u>with</u>* a ROI in place for a client (once launched)**
In Progress - application is started but not submitted	In Progress - application is started but not submitted
Submitted - application sent to the county	Submitted - application sent to the county
Received - the county has started processing the application	Received - the county has started processing the application
Processed - the case has been determined but denial/approval status is not provided.	Program Status – the most recent or current status and may include, but is not limited to ● Active ● Denied ● Discontinued ● Ineligible ● Pending, and ● Waiting to transfer;
Not accepted - Rare cases. Usually when an obviously “fake” application is submitted, such as one for “Mickey Mouse”	Not accepted - Rare cases. Usually when an obviously “fake” application is submitted, such as one for “Mickey Mouse”

35. **Will CBO accounts be able to see notices or applications for clients that do not have emails to set up their own accounts?**
    No. Currently the only way for clients to see notices and application information is to set up their own email address and use that to create a BenefitsCal Account.

After the integrated ROI is developed, CBOs may be able to access notices and case information on behalf of clients if they provide their permission. Access to the integrated ROI may be limited to the point of application.
CBOs can still email/fax/mail/upload signed ROI forms and contact the county directly to get case information for their clients. *All County Letter 23-37 on the Release of Information

36. Are assisters able to see when Clients' SAR7 and RRR are due?

Not at this time. When the integrated ROI is launched (date TBD) the client has an opportunity to submit a ROI, and decide data elements they would like to share with a CBO, including upcoming SAR 7 and renewal dates.
Clients can see this information themselves by creating an account with their own email address. More information is available at the quick guide: https://www.calsaws.org/wp-content/uploads/2022/10/BenefitsCal_QG_CreateAccount_NewUser.pdf

CBO Access vs Client Access in BenefitsCal

37. Is there a notice of action once an application has been processed? (Approve / Deny)

Consumers will continue to receive their Notices of Action about their case. CBOs will not have access to Notices of Action for clients until the integrated ROI process is developed.TBD when the integrated ROI will launch. See the BenefitsCal ROI FAQ for more information on the integrated ROI.

38. How long will application information remain on the dashboard?

a. Client dashboards will maintain application information for up to 365 days.
b. Once the integrated ROI is developed, access to information will be limited by client preference (up to 60 days of case history for Benefits Awarded, Program Status, Termination Reasons, and Upcoming SAR 7/Renewal date). If an ROI is revoked, CBOs will immediately lose access to the data they were given when the ROI was active. ROIs can be active for up to 365 days before having to be resubmitted.

Client Applications (Submitting, Processing, Tracking) & Client Data:

39. DO CBO's need to help clients complete new BenefitsCal accounts?

CBOs are not required to help clients set up their own BenefitsCal accounts. However, clients may benefit from being able to access information and manage their case on their own through the BenefitsCal portal, giving them greater autonomy. If CBOs have capacity to support clients in this way, we encourage that effort. See more information under "how to link a case to an account" and

other quick guides here:
https://www.calsaws.org/benefitscal-quick-reference-guides/

40. Can we continue to use the prescreen tool through BenefitsCal, but also submit applications through GetCalFresh?

Yes, you can use the prescreening tool that BenefitsCal provides, and then switch to GetCalFresh to complete the application.

41. **Can you select CalFresh and Medi-Cal at the beginning of the application to apply for both benefits using the same application? Can a client submit an application for multiple programs?**

Yes, applicants have the option to select multiple benefits programs for their application process.

42. Can a client or CBO skip questions if an answer is unknown? Will that affect the application process?

Yes, any question/screen can be skipped by clicking "next" unless there is a required question.
The only impact to the application process is that the information may need to be provided later to the worker.

43. Can an application be edited after an answer is selected? Is there a "back" button?

Yes, you can move back in the application process two ways:
Click the back arrow at the bottom left of the screen
At the end of each section and the end of the application, you can go back into various sections using the Application Summary Screen to review and edit information. See more information in the application quick guide:
https://www.calsaws.org/wp-content/uploads/2021/09/BenefitsCal_QG_ApplyForBenefits_v1.00.pdf

44. After an application is submitted, is the case number accessible?

Clients and CBOs will be able to see the case number for CalFresh, usually within a day or two of submission. Medi-Cal Case numbers are not available without an ROI.

45. Can a client sign into the website and finish their own account? Can a client finish an application started by a CBO?

a. If a client starts an application within their own account, they can sign in and finish it.
b. If the application was started without creating an account, and the person closes the website, the information will not be saved.

c. If the application was started by a CBO, only the CBO can complete that application. The client will either need to start over on their own or return to the CBO for support.

46. Can a CBO "delete" a draft application that they didn't submit?

a. Yes. You can go to "In Progress", find the application draft, and click "Remove application"

47. Can CBOs submit Qualified Medicare Beneficiary (QMB) cases and if so, how?

a. CBOs can submit a MediCal application which includes QMB cases through the regular application process.

48. Can a CBO upload documents for a client that they did not submit an initial application for?

a. Yes, you can upload documents with the anonymous document upload option on the main BenefitsCal homepage.

49. Do applicants receive a notification letting them know their SAR-7 or RRR is due soon?

Clients can create an account using an email address and sign up for text and email alerts (no quick guide on this however).
The BenefitsCal system will also alert them to their due dates when they log in to their account. You can find more information in the periodic reporting quick guide: https://www.calsaws.org/wp-content/uploads/2021/09/BenefitsCal_QG_PeriodicReport_v1.0.pdf

Miscellaneous / Other

50. Where do we find County contact information to help support Cal-Fresh expansion work in multi-county oversight areas? Or with higher education?

CBOs interested in expanding their public benefits outreach work should contact their county leadership directly or seek guidance from CDSS. CalSAWS Project does not cover this aspect of the work.

51. I have a specific non-technical question about parts of my application, who can I contact for support?

Contact the county directly as they are the primary contacts for eligibility questions. Depending on your county, you can do this by calling the contact center, calling a worker, emailing your county contacts (if you have one) or setting up a process with your county directly. CalSAWS and BenefitsCal are unable to help with case/benefits questions. CalFresh program rules are available here. https://calfresh.guide/