

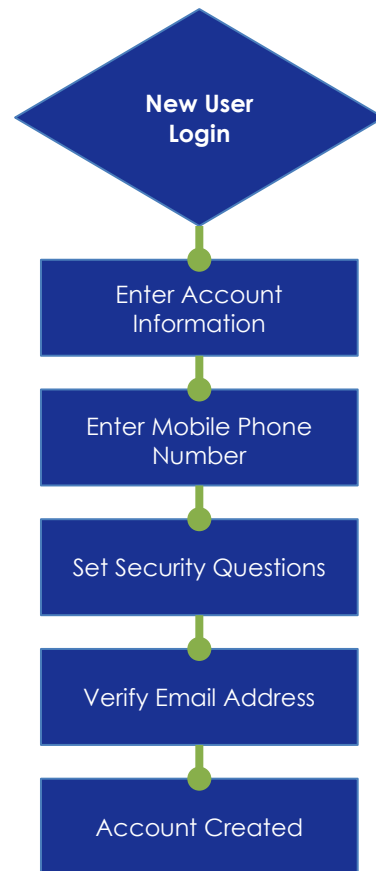
BenefitsCal | Quick Guide: Create an Account for New Users

Purpose

The purpose of this BenefitsCal Quick Guide is to provide instructions to assist users in creating a new account in BenefitsCal.

There are benefits to an account in BenefitsCal, such as having access to view case information and benefit balances, upload documents, opt in/out of email and text message notifications, and more.

High-Level Process Flow



FAQs

Q: Do customers have to create an account?

A: No, but it's recommended so you can see your case information.

Q: Is creating an account the same as applying?

A: No. Creating an account is not applying. After creating an account, log in and click the My Applications tab to apply.

Q: Can customers have more than one account?

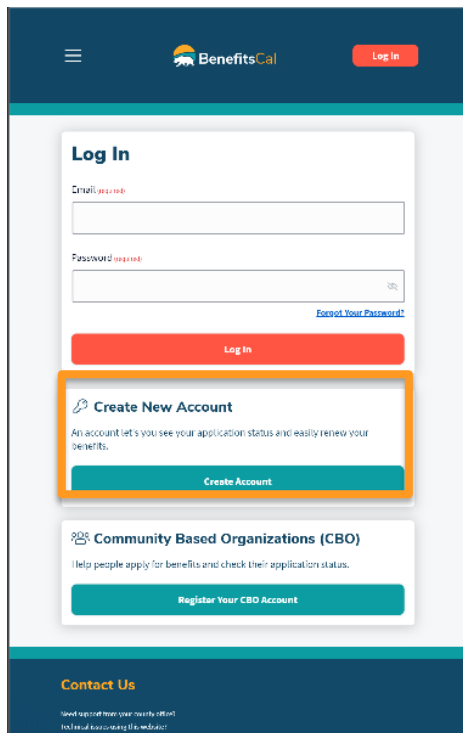
A: Customers can only have one account per email address AND only one email address/account can be linked to a given case.

Q: Why is the customer dashboard blank?

A: If you do not see specific case details, you may need to link the case to the account.

Create Account Process:

1



The screenshot shows the BenefitsCal website's login interface. At the top, there is a dark blue header with a menu icon, the BenefitsCal logo, and a 'Log In' button. Below the header, the main content area is white. It features a 'Log In' section with input fields for 'Email (required)' and 'Password (required)', a 'Log In' button, and a 'Forgot Your Password?' link. Below this, the 'Create New Account' section is highlighted with an orange border. It includes a heading 'Create New Account', a subheading 'An account lets you see your application status and easily renew your benefits.', and a 'Create Account' button. Further down, there is a 'Community Based Organizations (CBO)' section with a subheading 'Help people apply for benefits and check their application status.' and a 'Register Your CBO Account' button. At the bottom, there is a 'Contact Us' section with a subheading 'Need assistance with your benefits?' and a 'Contact Us' button.

New User Login

Click the **CREATE ACCOUNT** button.

2

Let's create your account.

First Name (required)

Last Name (required)

Email (required)

This is the email you'll use to login to your BenefitsCal account.

Password (required)

It must include at least:

- 6 characters
- 1 number
- 1 letter
- 1 special character (!@#\$%^&)

Confirm Password (required)

The two passwords should match.

Mobile Phone (optional, for password reset)

Make sure you have your phone with you. We'll ask you to verify it.

☐ By checking this box, I verify that this is my mobile number and consent to receive text messages to access my BenefitsCal account. Message and data rates may apply.

☐ I read, or had read to me, and I understand and agree to the [Terms and Conditions](#).

Next

Create Account Information

Complete the following fields:

- **First Name**
- **Last Name**
- **Email**
- **Password**

The password must be eight (8) or more characters long and must include at least one (1) of each of the following:

- ✓ Number
- ✓ Letter
- ✓ Special character (!#\$%&)



If the passwords entered do not match, the system will display an error message.

3

Let's create your account.

First Name (required)

Last Name (required)

Email (required)

This is the email you'll use to login to your BenefitsCal account.

Password (required)

It must include at least:

- 6 characters
- 1 number
- 1 letter
- 1 special character (!@#\$%^&)

Confirm Password (required)

The two passwords should match.

Mobile Phone (optional, for password reset)

☐ By checking this box, I verify that this is my mobile number and consent to receive text messages to access my BenefitsCal account. Message and data rates may apply.

☐ I read, or had read to me, and I understand and agree to the [Terms and Conditions](#).

Next

Enter Mobile Phone Number

Enter a **Mobile Phone** number. **This is an optional field.**



With a mobile phone number, you can receive text message notifications and codes to recover their account.

Click the checkbox to provide consent to receive text messages if a mobile number is entered.



Consent is required if a mobile phone is entered.

Click the second checkbox acknowledging the **Terms and Conditions**. Click the **NEXT** button.



If the check box is not selected, a message will display at the top stating **"Please select this checkbox"** Consent is required.

4

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

First Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

Second Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

Third Security Question (required)

- Select One -

Answer (required)

Only include letters and numbers.

< Create Account

Set Security Questions

Choose and answer three (3) **Security Questions** to set up the account.

Click **Create Account** button.



The answers to the security questions cannot be the same: each question needs a unique answer.



The answers to the security questions must include only letters and numbers, no special characters (%\$#).

5

A code is on its way!

Enter the six-digit code sent to M***d@mailinator.com.

Verification Code (required)

460629

This code expires in 15 minutes.

[Didn't get a code? Try again.](#)

< Submit

Verify Email Address

Next, the BenefitsCal system will send an email with a verification code to complete the new account setup.

Enter the code provided via email to confirm the email.

Click the **SUBMIT** button.



If the verification code is not correct, an error message displays – “**Please enter a valid code.**”

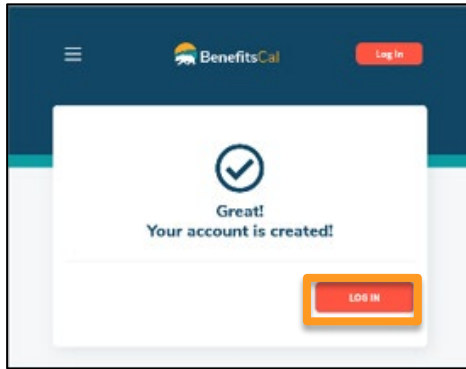
If the optional Mobile Phone number was included, the number must also be verified.

Enter the code provided via text message to confirm the mobile phone.



You may have a setting that means you cannot receive verification codes via text. If this is the case, you should remove the mobile number and proceed with account setup.

Click the **SUBMIT** button.



Account Created

Once the verification code(s) are entered correctly, the BenefitsCal account is created, and you are ready to log in.

Next, log in to BenefitsCal with your new credentials.