CalFresh Outreach FAQ

GetCalFresh Dashboard
Community Based Organizations (CBO)

Setting Up Your Account

**Request an Account**

1. Navigate to GetCalFresh.org
2. Scroll down to the footer and select *Partner as a CBO.*
3. Select *Get an account.*
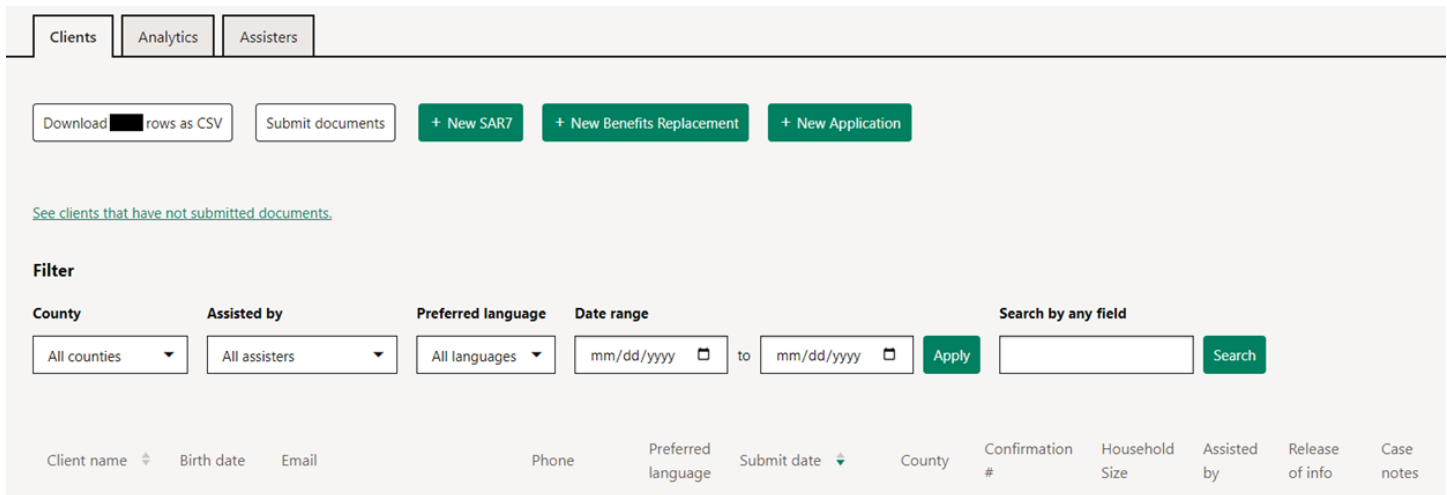4. Complete and submit the form.

Sign in to your Account

1. Navigate to GetCalFresh.org
2. Scroll down to the footer and select *Assister sign in.*
3. Sign in using the email address and password associated with your account.
4. The email address used to log in will be sent a 6-digit verification code that you need to complete the sign in process.

Using Your CBO Dashboard

The three tabs of your CBO Dashboard are Clients, Analytics, and Assisters.
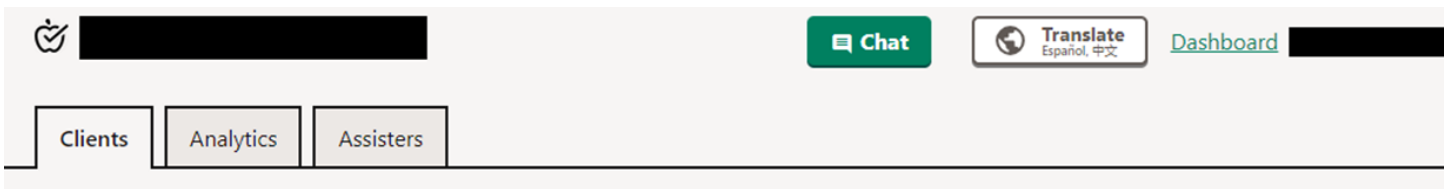
Clients Tab

Features of the Clients tab include:

1. Downloading the clients list as a CSV file

   a. This will download a CSV file with columns for client name, birth date, email, phone number, preferred language, submit date, county, confirmation number, household size, assisted by, and case notes.

   b. Data that is shown as *** means that the client did not allow for information to be shared with the CBO.

2. Submitting documents

   a. This includes verifications required for the CalFresh application

   i. Although this is an option on GetCalFresh.org, we recommend that you submit client verifications by making an account and submitting via BenefitsCal.org. For more information, download BenefitsCal How to Create Account Assister.

3. Starting a Semi-Annual Report (SAR-7)

4. Starting a Benefits Replacement application

5. Starting a new CalFresh application

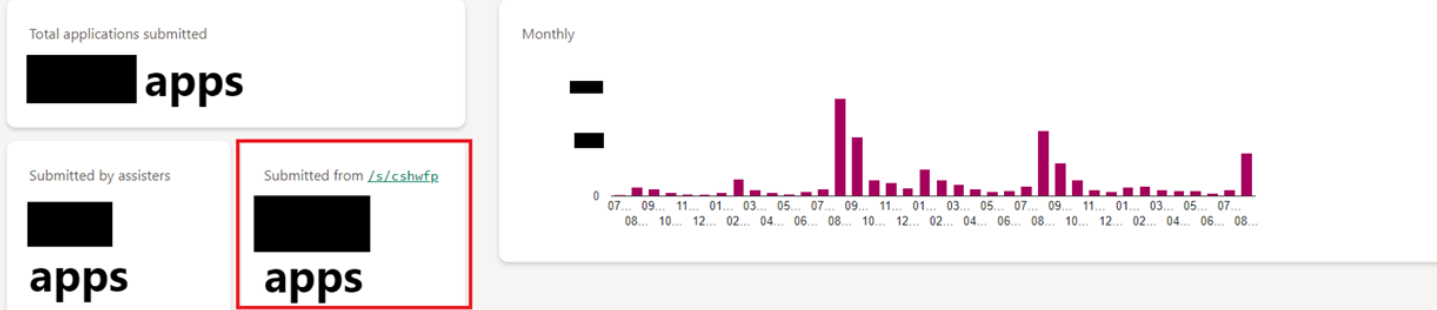## How to navigate the client database

There are drop down filters for county, assister, language, and date range of submitting app. Other fields can be filtered by typing in information such as name, birth date, phone number, or email. Per individual row, you can add, or view case notes related to that particular case.

Analytics Tab

Features of the Analytics tab include:

1. The analytics tab also allows you to submit documents and start a SAR-7, benefits replacement application, and a new CalFresh application.

2. Bar graph for applications submitted

    a. If you hover over the month of interest, the total number of applications submitted that month will show up

3. How to access your Referral URL

    a. The link in the red box (as shown above) is the Referral URL associated with your CBO account

Funded by California Department of Social Services, and USDA SNAP. USDA SNAP is known in California as CalFresh, an equal opportunity provider and employer. CalFresh is a California State University, Chico Partner.

Clients	Analytics	**Assisters**

+ New Assister

Assister Name	Email	Created at	Actions

Assister Tab

Features of the Assister tab include:

1. Assisters marked as ADMIN have the ability to add and remove other assisters.

   a. This shows a list of those who have access to the CBO account to be able to assist a client with a CalFresh application.

   b. We recommend that each individual assisting clients with completing CalFresh applications should be listed as an assister.

How to add an Assister

1. Click the green button + New Assister

2. Add the assister name, email and password.

3. For assister role, click assister.