

GO CARD PROGRAM

Guide for Partner Agencies

Updated: February 3, 2026

Please note: this document will continue to be updated as new questions, workarounds, or issues arise.



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Accessing the Beam Platform

Access the Beam Program Management facing platform using your email:

<https://app.bybeam.co/partner/sm101-gocard/auth/signin>

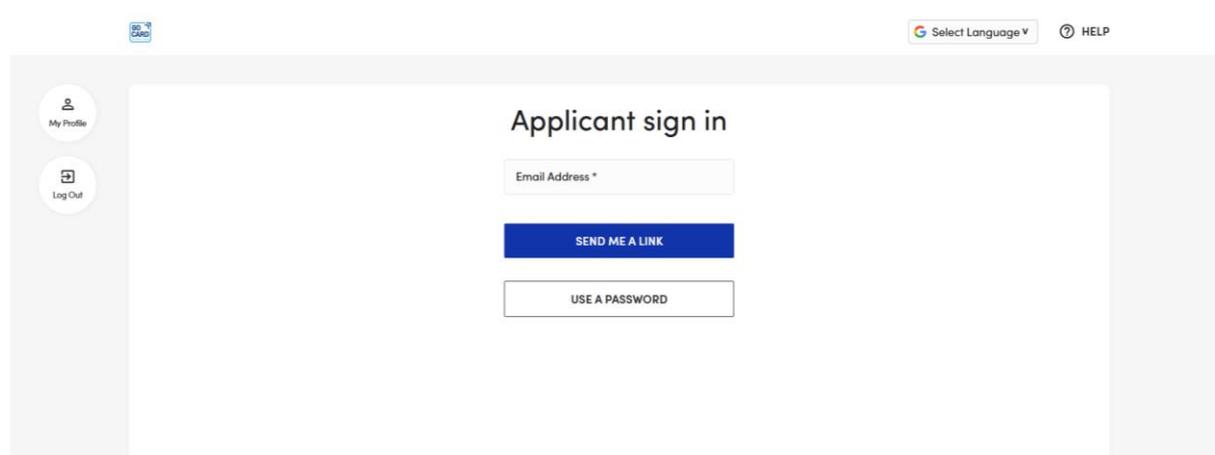
Beam, the Program Management Platform, can be used to add applicants directly if they are requesting in-person assistance, and to review and verify the eligibility of all applicants who heard about the program through your organization.

When completing the application on behalf of the applicant, please make sure to fill out all fields. If there are any technical issues or questions, please contact Beam’s support email: support@bybeam.co

Access the public facing portal: <https://app.bybeam.co/sm101-gocard>

You can provide the application portal link to interested community members who would like to apply at on their own. Please be sure to let them know that they should select your organization from the dropdown menu when they are asked how they heard about the program in the pre-screener questions.

This is what the public facing portal looks like:





Using the Beam Platform

Please see the full library of Beam's training materials [HERE](#).

Specific links that could be helpful:

- [Case Manager Platform Training Guide](#) - A good overview document for case managers that covers using the platform to add, review, and approve applications.
- [Case Management Portal Overview](#) - Video demo walking through the case management platform and how to review and approve applications.
- [Application Resubmission Process](#) – Video demo for requesting applicants to resubmit proof(s) and how applicants can update proof(s).
- [Applicant Portal Support Guide](#) - Document walking through the application process (from the public-facing application portal).
- [Claiming Funds](#) - Document walking through the process of claiming a Go Card.

If you run into any technical issues, email Beam Support: support@bybeam.co

Where the Go Card can be Used

Below are the transportation services that the Go Card can be used on:

- Amtrak
- BART
- BikeLink
- Caltrain
- Clipper
- FasTrak®
- SamTrans Redi-Wheels Paratransit
- SamTrans Ride Plus
- SamTrans
- BayWheels
- San Francisco Bay Ferry

Note: The Go Card does not have the feature to tap on the bus or trains directly to pay for trips. The Go Card can only be used as a form of payment when adding money to your FasTrak account, Clipper Card account, or for the other transportation services.

To purchase/reload funds on a Clipper Card, the Go Card is used as a form of payment online, over the phone, or in-person at self-service transit machines or staffed locations. Walgreens or other retailers do not accept the Go Card as form of payment to reload/purchase Clipper Cards.



- Clipper Card toll free number: (877-878-8883)
- Clipper Card Locations: <https://www.clippercard.com/locations>
- Staff Location in San Mateo County:
 - SamTrans, 1250 San Carlos Avenue, San Carlos, CA 94070
 - Open Monday - Friday, 8:30am - 5:30pm

Technical Assistance for Applicants

For applicants with limited internet or comfort with technology, the recommended approach is to complete the application process in one sitting. This means a case manager would:

1. Add the applicant to the program management platform and upload their documents
2. Approve the application in the platform immediately (assuming eligibility requirements are met)
3. Support an applicant with claiming the Go Card
 - Physical - received via mail within 7-10 business days - Your organization may choose, at your discretion, to receive the card on behalf of unhoused applicants
 - Virtual - received immediately via email

What if a Go Card Program applicant does not have an email address?

We understand that requiring an email address can present challenges. There is limited email communication involved in this program, and applicants will not need to monitor it regularly. Therefore, we recommend two possible solutions for participation in the Go Card Program.

A. Create an Email

Our first recommendation is to work with clients to create their own email whenever possible. Potential sites for creating emails include [Outlook](#) or [Atomic Mail](#). They do not require a phone number for the account and allow users to create an email within a minute.

For Atomic Email:

1. Add applicant's name and create an email address
2. Create password
3. Copy Seed Phrase.
 - a. The Seed Phrase will help you restore account access.

B. Use Case Manager Email

For applicants who do not feel comfortable creating and using their own email, Case Managers can use a variation of their case managers email address to receive email communications (e.g. claim instructions) on their behalf, by using the "+" workaround. This entails adding a "+" followed by additional text after your email but before the @ sign.

Here is an example using Natalie Lane as the case manager, Suzy Ford as the applicant and the company email as email.com. The email address with the applicant's name would appear as

Natalie.Lane+suzyford@email.com

For consistency in the naming format, please use the applicant's name *after* the plus sign. Using this workaround is effective because the system still considers it a unique email address, while the claim instructions will be sent to the case managers email inbox, allowing them to assist applicants.

With this workflow, applicants would not need to check an email inbox. The case manager would receive the claim instructions to their email address to assist applicant with selection of a virtual or physical card.

Things to Watch Out For:

- If the Go Card is not claimed within a certain timeframe, the applicant or the case manager will receive reminders on behalf of the applicant to claim it.
- If the case manager uses their own email address in an application without the workaround described above, it will cause issues and may cause the system to revoke the case managers platform access. If this happens, please email support@bybeam.co.
 - The system provides the option to select "The applicant does not have an email address." **We do not recommend doing this.** This will cause a placeholder Beam email address to be automatically generated in order to satisfy the system's requirement for a unique email address. However, no one will have access to this placeholder email, and it cannot be used to receive communications or claim a Go Card. We are unable to remove this in



the system. If an application already got approved with a Beam auto-generated email, it is still possible to manually change the email in the application to a variation of the case manager's email (e.g., the "+" workaround).

Quick troubleshooting:

If you are encountering errors with the platform, especially when logging in on behalf of an applicant, please try logging out. An error may occur if the system thinks you are logged in to multiple accounts at once, or logged into both the application portal and the case management platform.

Invoicing

Quarterly Invoice Schedule 2026

Due Date	Invoice Cycle
April 9, 2026	January 1 - March 31, 2026
July 9, 2026	April 1 – June 30, 2026
October 9, 2026	July 1 – September 30, 2026
January 9, 2026	October 1 – December 31, 2026

Monthly Invoice Schedule 2026

Due Date	Invoice Cycle
January 9, 2026	November 17 – December 31, 2025
February 9, 2026	January 1 – January 31, 2026
March 9, 2026	February 1 – February 28, 2026
April 9, 2026	March 1 – March 31, 2026
May 9, 2026	April 1 – April 30, 2026
June 9, 2026	May 1 – May 31, 2026
July 9, 2026	June 1 – June 30, 2026
August 9, 2026	July 1 – July 31, 2026
September 9, 2026	August 1 – August 31, 2026
October 9, 2026	September 1 – September 30, 2026
November 9, 2026	October 1 – October 31, 2026
December 9, 2026	November 1 – November 30, 2026

To calculate the total amount to invoice, you will need: 1) the number of Go Cards issued during the reporting period and 2) the number of community outreach events



attended/hosted during the reporting period. The invoice template with the community outreach event reimbursement form is saved [here](#).

1. **How to find the number of Go Cards Issued:** On the Beam Program Management Platform, follow these steps. First, click the "Analytics" tab located on the lefthand side menu. Once you are there, navigate to the "Monthly Payments Initiated" tab at the top. Then, open the filters tab (click the blue arrow symbol with three lines located on the lefthand side) and select your specific organization. Here is a 1-minute video that shows how to do this: [LINK](#).
 - a. The resulting '**Total Cases Paid**' is the correct number that should be used to calculate the invoice amount.
 - b. **Important Note:** By default, the filter covers only the previous month. To alter the timeframe please edit the filter to cover the relevant months and obtain the correct number to invoice. The screenshot here shows that once you open the date field and navigate to the "Basic" tab at the top of the pop-up, you can customize the date range.
 - c. **Export the Payments Initiated w CBO Referral Table** by clicking the three dots on the righthand side of the table, selecting "Download," and then selecting "Export to Excel."
2. **Community Outreach Events:** Community outreach events are reimbursed at a rate of \$350 each, with a cap of 4 reimbursable events per fiscal year. If you attend or host a community outreach event with a dedicated staff person promoting the Go Card Program that you would like to request compensation for, please be sure to fill out the form and include it as part of your invoice. Please share any photos from the event, if available. As a reminder, we kindly ask that you notify us in advance of future events in case JPA staff would like to attend.

Requests for Updated Documents/Proof of Income

1. When requesting that an applicant re-upload documentation, the application status must be set to '**Incomplete.**' This requires the case manager to open the application and update the status to 'Incomplete.' Doing so enables the applicant to upload new documentation or make changes to their application. Steps to update the application status are outlined below: Go into the application tab of the applicant.
2. Go to the line where the change needs to be made by the applicant and click the comment bubble.

3. Go to the “Review Status (required)” button and click “Requires Submission.”
 - a. Video demonstration located [here](#).
4. Go back to Case Overview, click the three dots next to the “Deny” button.
5. Click “Change Status or assignee.”
6. Change the status to “Incomplete.”
7. Write the reason why the application status has changed, e.g. “Please re-submit proof of income. Thank you.”
8. Click “Mark as Incomplete.”
 - a. Video demonstration located [here](#).

This will trigger an email to the applicant to update their application.

Reassign CBO in Application

To reassign a CBO in an application, you must do the following:

1. Make sure the Sidebar is open. It should say “Case Workflow” on the top.
 - a. If not, go to “Toggle Sidebar” in the righthand corner and click.
2. Find “Latest Submission” and click on the date and time. A new tab will open.

The screenshot shows the Go Card application interface for case C000383219 - Natalie Test. The main area displays a 'Review Fields' table with the following data:

Field	Response	Actions
Agelimit	*Yes*	[icon]
Resident Y N	*Yes*	[icon]
Ami	*Yes*	[icon]
Cbo Referral	*other*	[icon]
Other C B O	*Test*	[icon]
Date Of Birth	*12/31/2000*	[icon]
Address > Mailing Address	*1250 San Carlos Ave, San Carlos, CA 94070-2400*	[icon]
Id Verfpload	[icon] Go Card Logo.png	[icon]
Currentaddressid > Currentaddressid	*Yes*	[icon] 1
Income Document	*No Documentation*	[icon]
Income Certify	*Yes*	[icon]
Employees	*6000000*	[icon]
Maritalstatuselected	*Single*	[icon]

The right sidebar shows 'Case Workflow Details' with the following information:

- Program: Go Card Program
- Created: 12/17/2025
- Case status: Incomplete
- Case ID: C000383219
- Assignee: None
- Expedited: No
- Submissions: 3
- Latest Submission: 1/13/2026, 1:45:49 PM

The 'Applicant details' section shows:

- Name: Natalie Test
- Beam User ID: U000280229
- Phone: Phone not provided
- Mailing Address: 1250 San Carlos Ave, San Carlos, CA 94070-2400
- Email: natalie.gocardtest@...

3. Click “Add New Version”

Case C000383219 > A000383203

Natalie Test
Application A000383203 updated 01/13/2026 by Natalie Martinez [Version Notes](#) 01/13/2026 | Natalie M. [Add New Version](#)

Version Notes
status change to "Incomplete" requires new version: "Please resubmit proof of income."

Pre-Screener Questions Section Completed

Are you 18 years of age or older?

Yes
 No

Are you a resident of San Mateo County?

Yes
 No

Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?

If you are unsure whether you are under this income threshold, detailed income limits based on household size can be found at the San Mateo County website under the HUD-defined AMI limits: <https://101expresslanes.org/program/equity-program>.

Yes
 No

4. Type why you are making the edit in the box under “Provide reasons for your changes here.”
 - a. Example: “Reassigning CBO from Coastside Hope to YMCA.”
5. Click “Edit Section” on the “Pre-Screener Questions” section.

Case C000383219 > A000383203

Natalie Test You are now editing a new version Cancel [Save as new version](#)

Provide reasons for changes here.
Reassigning CBO from "Org A" to "Org B."

Pre-Screener Questions Section Completed [Edit section](#)

Are you 18 years of age or older?

Yes
 No

Are you a resident of San Mateo County?

Yes
 No

Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?

If you are unsure whether you are under this income threshold, detailed income limits based on household size can be found at the San Mateo County website under the HUD-defined AMI limits: <https://101expresslanes.org/program/equity-program>.

Yes
 No

6. Under “Please select an organization from the dropdown menu,” choose the desired organization.

Natalie Test ⓘ You are now editing a new version Cancel Save as new version

Pre-Screener Questions Editing in Progress ✎ Cancel Update

Are you 18 years of age or older?

Yes
 No

Are you a resident of San Mateo County?

Yes
 No

Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?

If you are unsure whether you are under this income threshold, detailed income limits based on household size can be found at the San Mateo County website under the HUD-defined AMI limits: <https://101expresslanes.org/program/equity-program>.

Yes
 No

How did you hear about this program?

Please select an organization from the dropdown menu.

How did you hear about this program? *	Organization Name *
Other Organization	Test

7. Click “Update.”

Pre-Screener Questions Editing in Progress ✎ Cancel Update

Are you 18 years of age or older?

Yes
 No

Are you a resident of San Mateo County?

Yes
 No

Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?

If you are unsure whether you are under this income threshold, detailed income limits based on household size can be found at the San Mateo County website under the HUD-defined AMI limits: <https://101expresslanes.org/program/equity-program>.

Yes
 No

How did you hear about this program?

Please select an organization from the dropdown menu.

8. Click “Save as New Version.”

Natalie Test ⓘ You are now editing a new version Cancel Save as new version

Provide reasons for changes here.

Reassigning CBO from *Org A* to *Org B*

Pre-Screener Questions Section Completed ⓘ Edit section

Are you 18 years of age or older?

Yes

No

Are you a resident of San Mateo County?

Yes

No

Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?

If you are unsure whether you are under this income threshold, detailed income limits based on household size can be found at the San Mateo County website under the HUD-defined AMI limits: <https://101expresslanes.org/program/equity-program>.

Yes

No

How did you hear about this program?

9. Go back to the Case Overview section and “New Note.”
10. Use the same wording as before and click “Publish.” Doing this will give context to the new CBO on the change.
 - a. Example: “Reassigning CBO from Coastside Hope to YMCA.”

Go Card Progr... > C000383219 • Natalie Test

Case Overview Application Payments

Race > Other	Not answered	
Language > Language	"English"	
Language > Other	Not answered	
Edu Level	"9 - 12 years"	
Affirmation	"true"	

Documents + Upload Document

Preview	Document type	Uploaded at	Pinned	Actions
Go Card Logo.png	Unclassified	12/31/2025 12:04PM by Natalie Martinez	✕	...

Notes + Add new note

Natalie Martinez 1/16/2026 at 3:03 PM

Reassigning CBO from Coastside Hope to YMCA.

Activity

- Natalie Martinez New Version from 64e34582-4f38-497c-85a5-2b30678b2fee to 5e292094-19af-4e2f-915a-a97dff8b83b1 on 12/31/2025 12:04PM
- Natalie Martinez reviewed Currentaddressid.currentaddressid with requires resubmission on 01/13/2026 1:44PM
- Natalie Martinez changed status from In Progress to Incomplete on 01/13/2026 1:45PM

Please resubmit proof of income.
- Natalie Martinez New Version from A2e27afi-8b86-4a14-983d-6cc734df4649 to 377838df-50bb-4b55-8e38-7bb6e4636d30 on 01/16/2026 3:01PM

11. The application will now appear under the new organization’s “Ready to Review” section.

MOUs / Program Functions

The adopted FY26 budget for the San Mateo County Express Lanes JPA (SMCEL-JPA), ending June 30, 2026, includes funding for a total of 7,500 Go Cards to be shared across all Partner Agencies that support program eligibility verification. This allocation is based on the dollar amount approved for the Go Card Program in the JPA’s FY26 budget.

The Memorandum of Understanding (MOU) between SMCEL-JPA and the Partner Agencies extends through the end of FY28. For future fiscal years, the MOU assumes an allocation of 7,500 Go Cards per year for FY27 and FY28; however, these amounts are subject to change based on the adopted program budget, as outlined at the end of Section 4.

A total of 7,500 Program benefits have been budgeted for distribution from Program launch through June 30, 2026, across all partnerships. Funding for the 2026-2027 and 2027-2028 Fiscal Years (FYs) has not yet been determined, but assumed to remain the same for the purposes of this MOU. Enrollment of new program participants is contingent on funding availability and may be paused in the event that benefit funds are exhausted.



Other General Questions

- 1. If a client has a mailing/resident address within San Mateo County but wants their physical card to be mailed outside of San Mateo County to another address is that allowed?** There is no current restriction that physical cards must be mailed within San Mateo County. Approved applicants are prompted to confirm their mailing address when they log back into the application portal to claim their Go Card, and this may be different than the address of residence they used in their application. This may be subject to change in the future, in which case all program partners will be notified.
- 2. Proof of Address for unhoused clients - if they don't have an ID with a San Mateo County address and/or no other document to support that they reside in this county, can we move forward with application?** The program will defer to each CBO in how they would like to handle this. If your organization is comfortable approving applicants that are not able to provide proof of address, this is completely at your discretion.
- 3. Can our staff that meet eligibility requirements apply for the card through our agency or is that a conflict of interest and must be referred to another agency?** Case managers can apply to receive the Go Card benefit, provided they meet the program's eligibility requirements. However, we recommend that a different case manager processes the application and that the case manager applies to the program using an email address that is different from their agency email (e.g. personal email). If the case manager applies using the same email address that they use to log in to the Program Management Platform, the system will revoke their access. Please contact support@bybeam.co if this happens.