Partner Agencies Guide

Updated: July 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

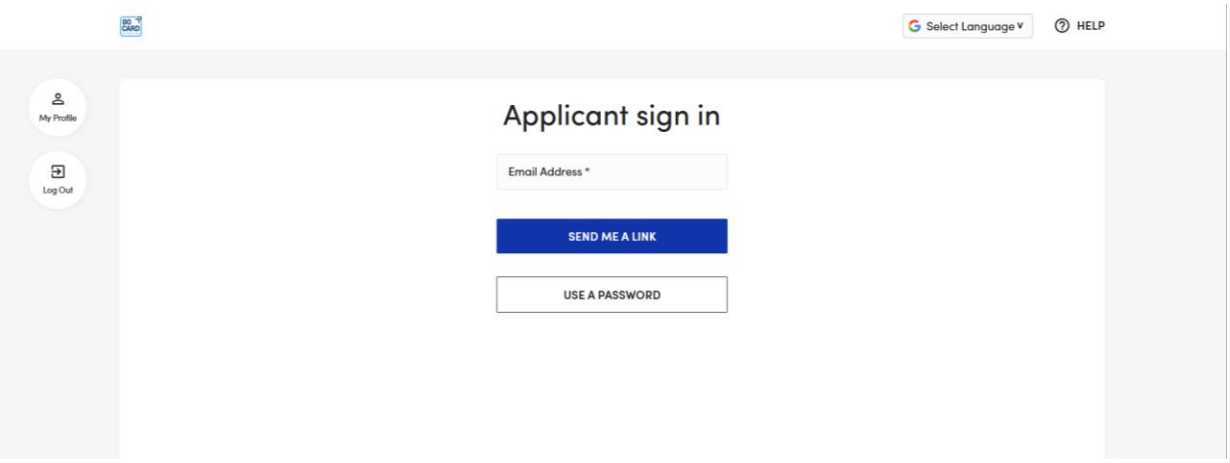
Beam, the Program Management Platform, can be used to add applicants directly if they are requesting in-person assistance, and to review and verify the eligibility of all applicants who heard about the program through your organization.

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).
- 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
- Via Assist
- 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 Customer Service Headquarters, 166 N. Rollins Road Millbrae, CA 94030
    - 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. Applicants choose the card type in the application
3. Approve the application in the platform (assuming eligibility requirements are met)
4. Applicants wait for their card to arrive:
    - 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. Applicants may also use the Samtrans Customer Service Headquarters: 166 N. Rollins Road Millbrae, CA 94030.
    - Virtual - received immediately upon Go Card Staff initiating payment via email

If applicants are having trouble with accessing their card or application, contact support@bybeam.co.

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 participants 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

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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 Fiscal Year 2027

Due Date	Invoice Cycle
October 9, 2026	July 1 – September 30, 2026
January 9, 2027	October 1 – December 31, 2026
April 9, 2027	January 1 – March 30, 2027
TBD	April 1 – June 30, 2027

Monthly Invoice Schedule 2026

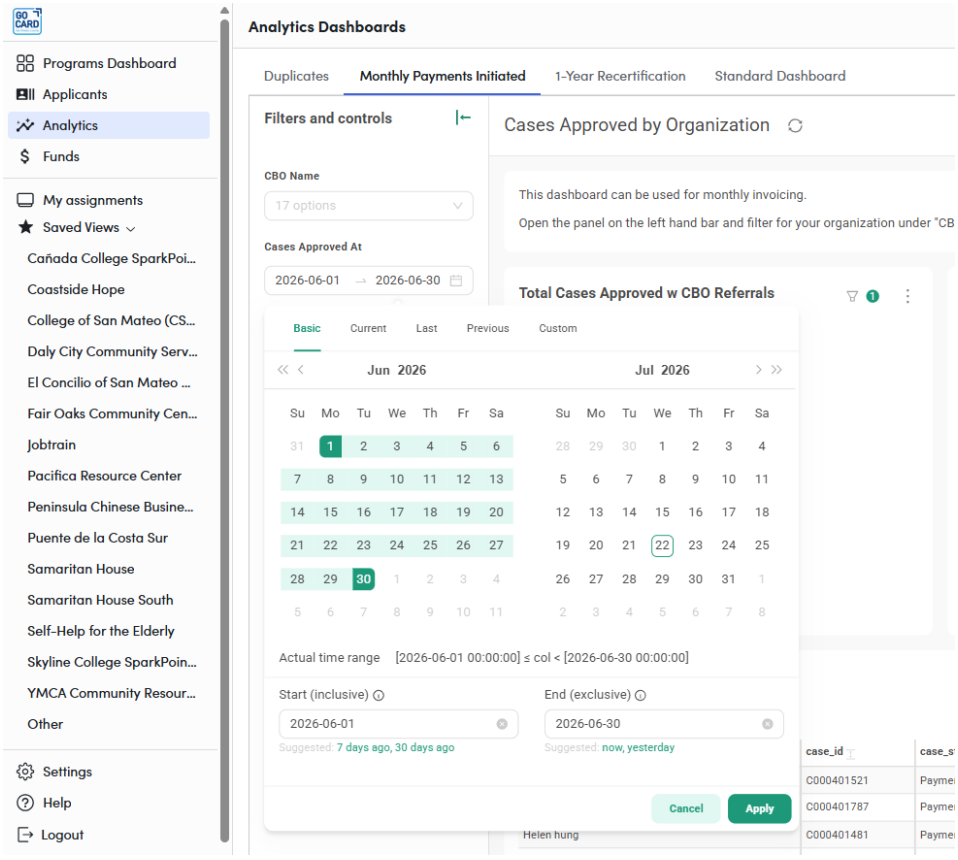
Due Date	Invoice Cycle
August 9, 2026	July 1 – July 31, 2026
September 9, 2026	August 1 – August 31, 2026
October 9, 2026	September 1 – September 30, 2026
November 9, 2026	October 1 – October 31, 2026
December 9, 2026	November 1 – November 30, 2026
January 9, 2027	November 1 – December 31, 2026
February 9, 2027	January 1 – January 31, 2027
March 9, 2027	February 1 – February 28, 2027
April 9, 2027	March 1 – March 31, 2027
May 9, 2027	April 1 – April 30, 2027
June 9, 2027	May 1 – May 31, 2027
TBD	June 1 – June 30, 202

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 below 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. Acceptable documents include pay stubs, tax forms, a letter from your employer, or a benefits letter such as Medi-Cal or CalFresh. If none of the income verification document options are available to you, you may sign a self-declaration statement confirming your income directly on the application. If you have any questions, please contact us at [CBO contact info]. Thank you."
    a. **Note: Do NOT send a message directly to the applicant. They will not be able to upload any documents or make changes to their application.**

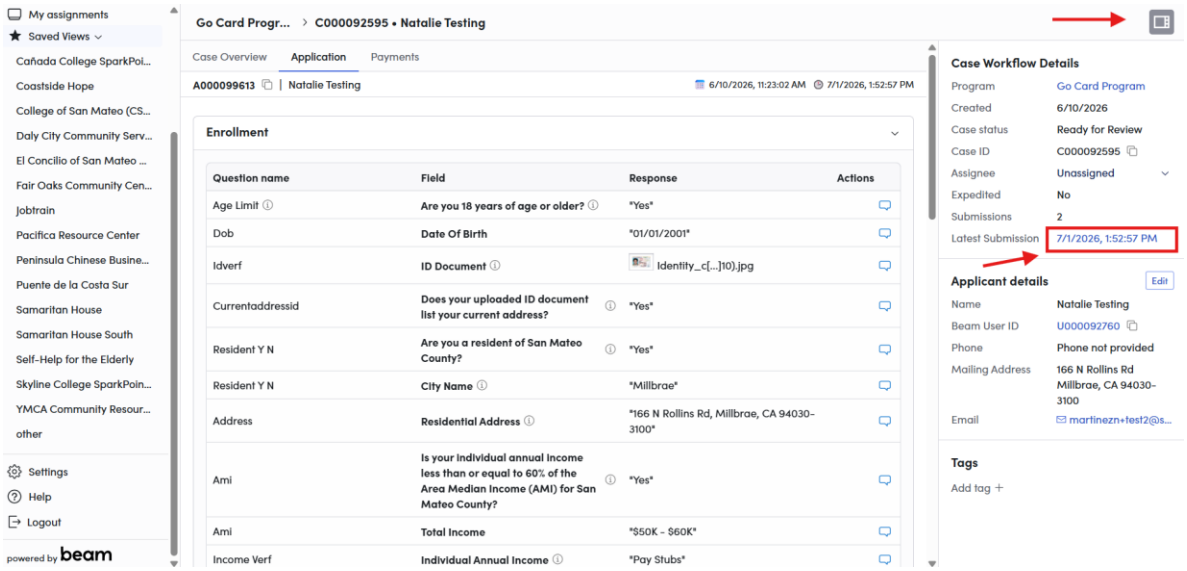
8. Click “Mark as Incomplete.”
    a. Video demonstration located **here**.

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

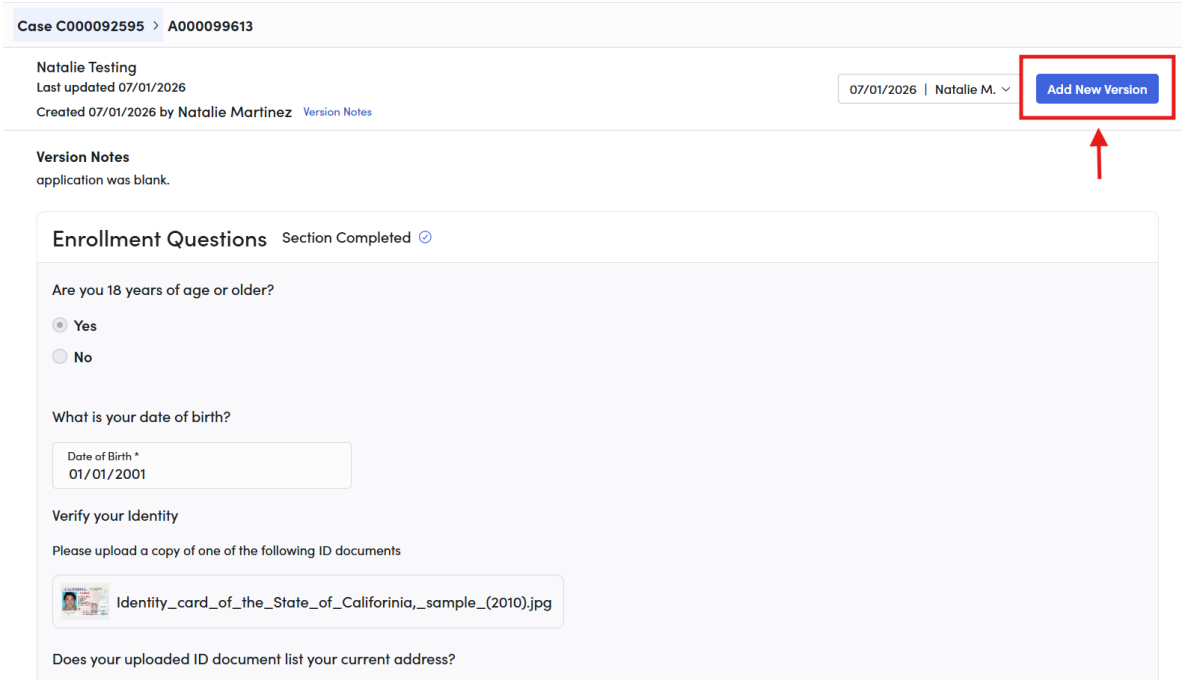
Reassign CBO in Application

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

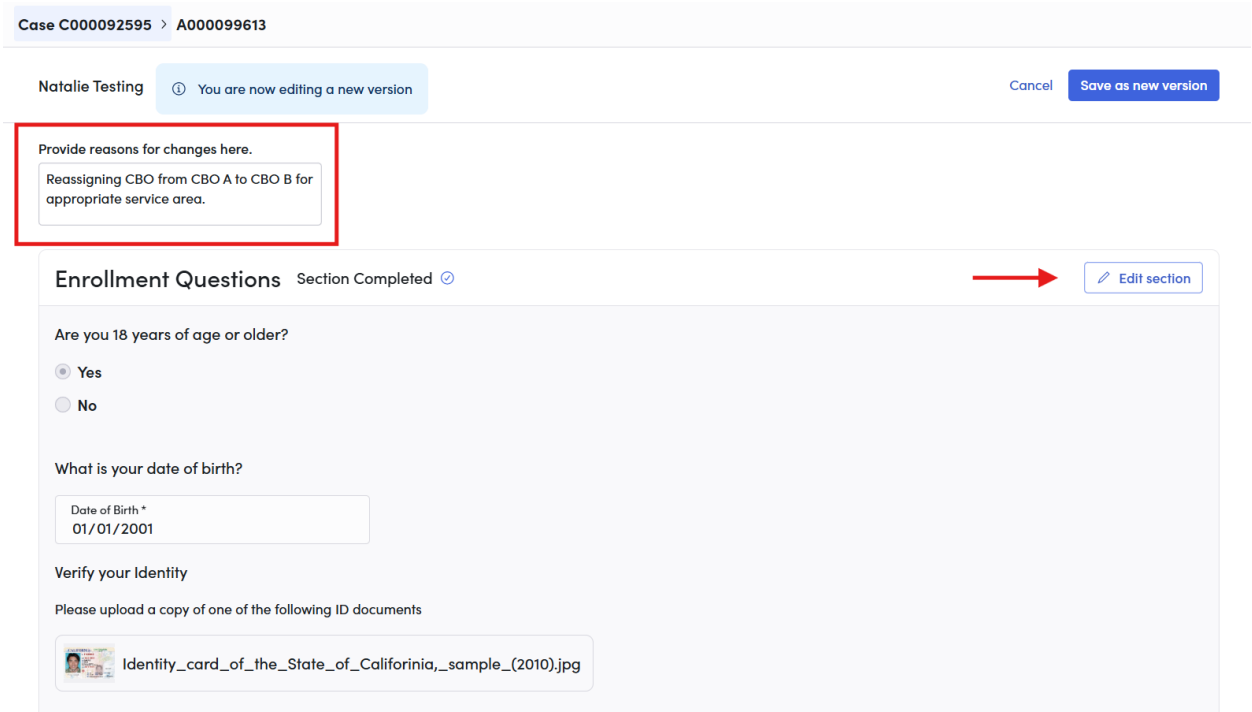
1. Make sure the Sidebar is open. It should say “Case Workflow” on the top.
    a. If not, go to “Toggle Sidebar” in the righthand corner and click.
2. Find “Latest Submission” and click on the date and time. A new tab will open.



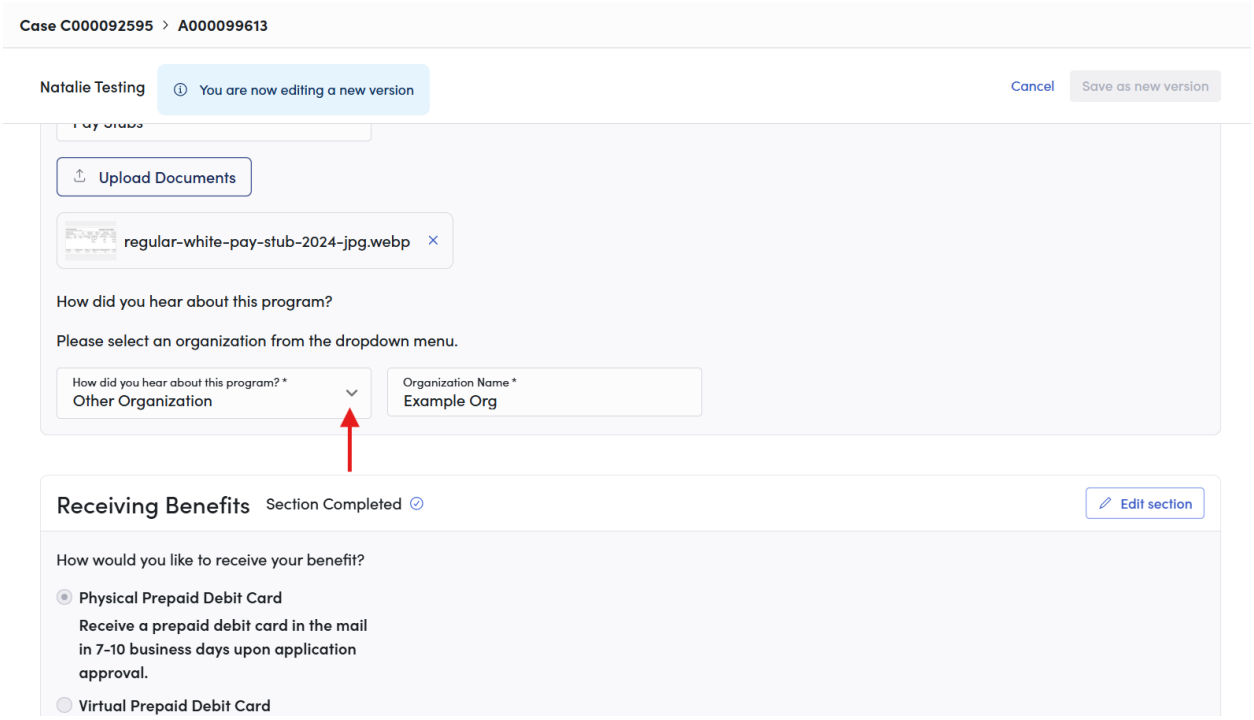
3. Click “Add New Version”



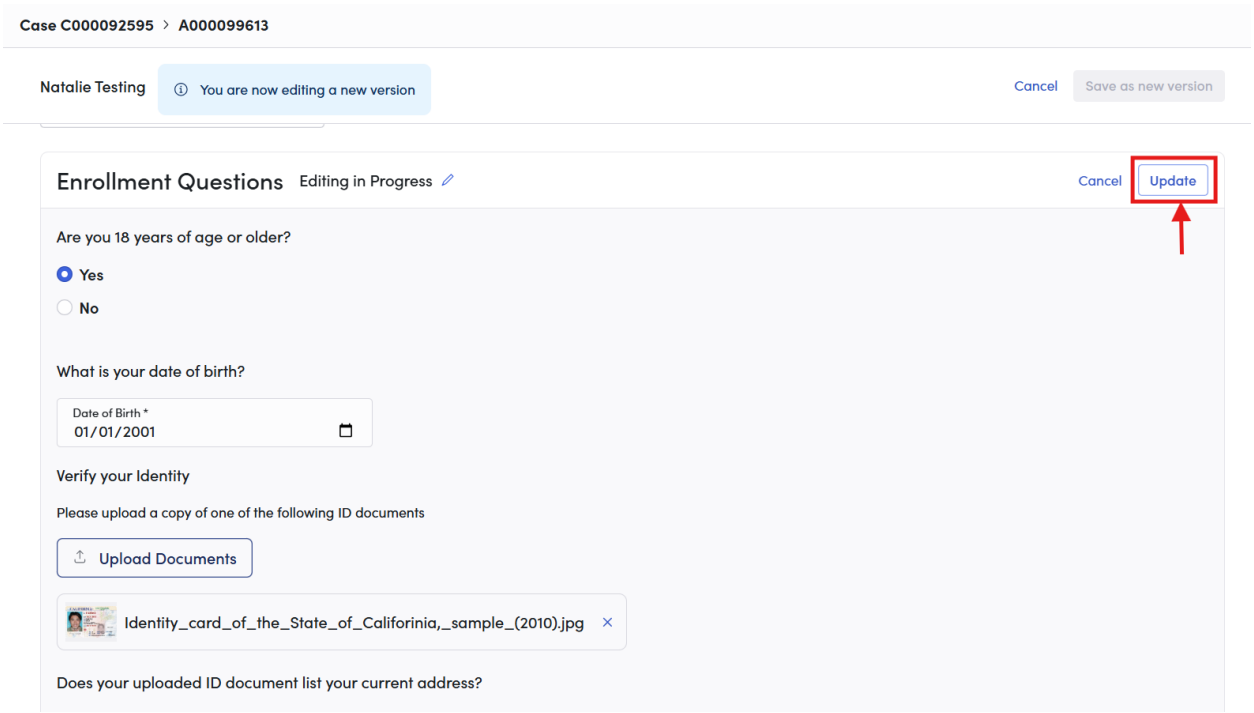
4. Type why you are making the edit in the box under "Provide reasons for your changes here."
    a. Example: "Reassigning CBO from Coastside Hope to YMCA."
5. Click "Edit Section" on the "Pre-Screener Questions" section.



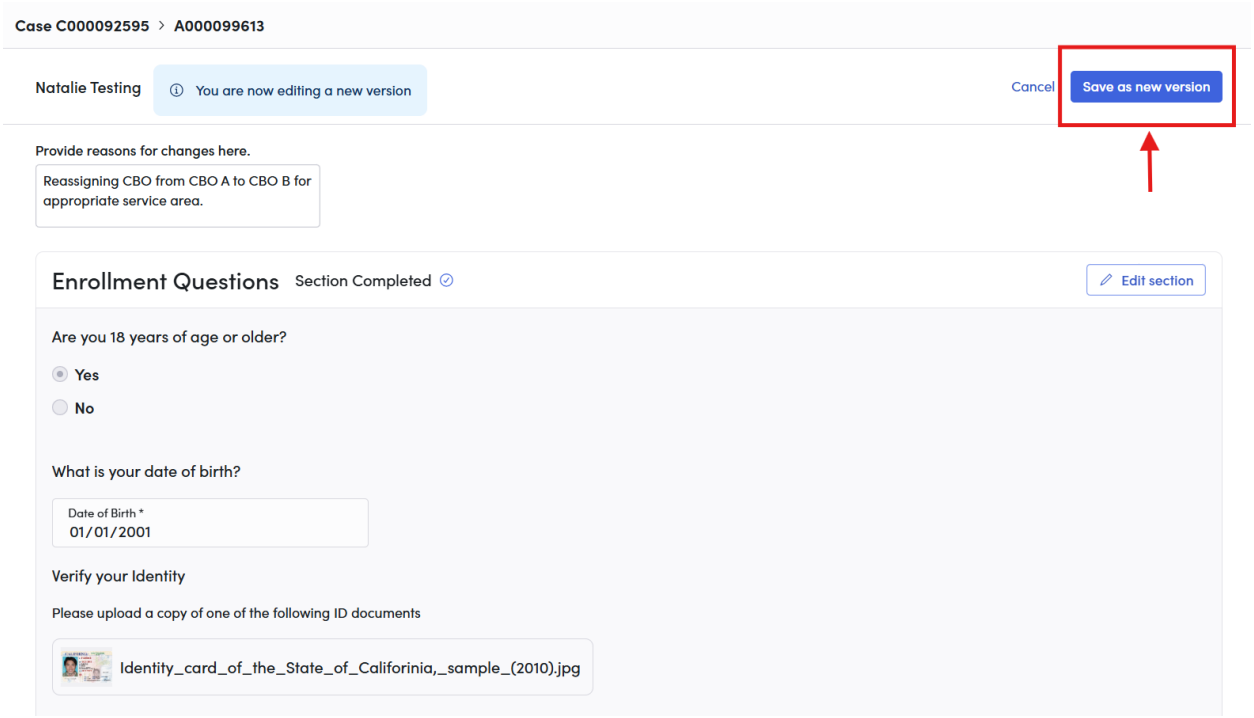
6. Under “Please select an organization from the dropdown menu,” choose the desired organization.



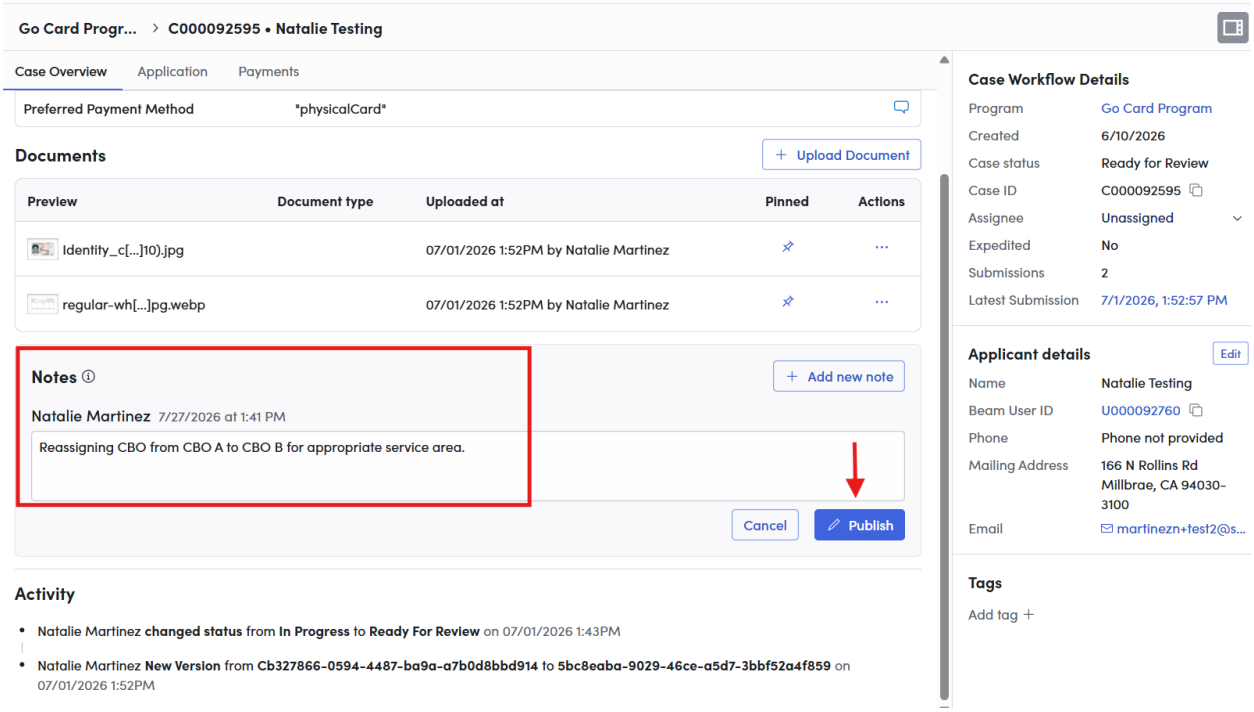
7. Scroll up and click “Update.”



8. Click “Save as New Version.”



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."



11. The application will now appear under the new organization's "Ready to Review" section.
12. The case manager does not have to send a message to the applicant that the application is re-assigned. If you decide to send a message, please explain that they are not in the service area, their application will be reviewed by the other CBO, and to contact that CBO with any questions.

Duplicates

Please read through the Finding Duplicates in Beam PDF. It provides a step by step on how to find duplicates.

MOUs / Program Functions

Partner agencies have the following responsibilities:

1. Support program applicants and participants.
2. Verify applicant eligibility through application platform .
3. Promotion and outreach of the Go Card Program .
4. General coordination and administrative activities such as attending regular meetings, invoicing, and budget monitoring .

The adopted FY27 budget for the San Mateo County Express Lanes JPA (SMCEL-JPA), ending June 30, 2027, 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.

Other General Questions

1. **What is the income eligibility? Can someone who makes more than $88,260 be eligible if they have dependents?** The current eligible income for the program is at or below 60% of the County's 2026 AMI, which is $88,260. If they make more than this amount, household size can be taken into consideration. Applicants must provide proof of household size, such as a Tax Statement.

60% AMI San Mateo County Income Limits							
Income Limits by Family Size ($)							
1	2	3	4	5	6	7	8
$88,260	$100,860	$113,460	$126,060	$ 136,200	$ 146,280	$ 156,360	$ 166,440

2. **When can participants reapply?**
   Participants can reapply one full calendar year after they submitted. Example- initial application submitted March 12, 2026. The participant would be eligible to reapply on March 12, 2027.
3. **What should participants do with their physical Go Card once the funds are finished?**
   Participants should keep their physical Go card. If the participant reapplies and is approved, the existing Go Card could have additional funds loaded directly onto the existing prepaid card.
4. **If a participant 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.

5. **Proof of Address for unhoused participants - 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.

6. **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.