Getting Started with Beam

Program Administrator

2025

beam
Formerly edquity

Beam Training Guide
2025

OVERVIEW

Beam has partnered with San Mateo County Express Lanes Joint Powers Authority to help distribute transportation benefits through the Go Card Program more quickly and efficiently. Beam's end-to-end technology platform simplifies applications and aids in decisioning and processing, while streamlining compliance, reporting, and case management into a single system.

SECTIONS

ADDITIONAL RESOURCES

Beam Zendesk for Case Managers
https://beampartners.zendesk.com/hc/en-us

Beam Zendesk for Applicants
https://bybeam.zendesk.com/hc/en-us

CASE MANAGER DASHBOARD

Logging into a case manager account

Case managers and program administrators have a separate login page. They should use their organization's email to log into the Beam portal. They will receive a link via email to log in.

CASE MANAGER DASHBOARD

In this section, we'll review:
- Case Manager Dashboard Overview
  - Programs
- Application Table
  - Application portal descriptions
  - Adding a new application
- Applicant Case Page
  - How to review an application
  - How to approve & award an application
  - How to mark an application as denied

Dashboard Overview

This dashboard provides a snapshot overview of fund availability, application statuses, and application volume.
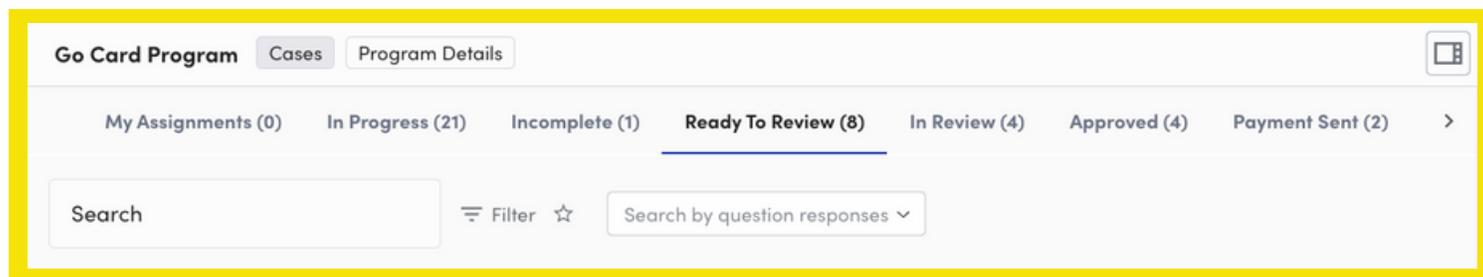
Click into the program name to drill down into applications and their different statuses.

Click directly into a CBO's applications from the sidebar menu

Case Status Descriptions

The following tabs indicate where in the application journey an individual application is.
You can select each tab to view applications with the associated label.

Status: My Assignments (admin-facing only)

This section indicates applications that have been assigned to you.

Status: In Progress

Application has been started but not yet submitted.

Status: Incomplete

Application has been previously submitted, but has been sent back to applicant because information needs to be updated or changed.

Status: Ready for Review

Application has yet to be reviewed by the Program Advocate. No messaging sent to applicant.

Status: In Review

Application has been marked by a case manager and is currently under review or being processed .

Status: Approved

Application has been approved and payment has been initiated, but the applicant has not yet selected a payment method to receive the funds.

Status: Payment Sent

The applicant has selected a payment method and the funds have been issued to them.

Status: Denied

The applicant was not approved to receive funding.

Adding a New Applicant

Case managers can add applications to the platform on behalf of constituents from the case management portal.

Create an account for a user by entering their full name and email address.

Adding a New Application

Fill out the application questions on behalf of the user and when finished, scroll back up and click "Save as a new Application."

Note: Click "EDIT" under each section to fill out the questions and click "UPDATE" after each section to save the responses.

Case C000368485 > A000368469

ⓘ You are now creating a new application   SAVE AS NEW APPLICATION   CANCEL

Pre-Screener Questions   EDIT

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, please compare your income against the "Income Table" at **https://101expresslanes.org/program/equity-program.**

● Yes

◯ No

How did you hear about this program?

How did you hear about this program? *
Samaritan House   ⌄

UPDATE   CANCEL

Once the application is saved and submitted, this successful message will appear:

··>   All changes saved!   DISMISS

Adding a New Application

Applications submitted by case managers will always go to the "In Progress" tab by default.

Click on the Case ID to open the case page and move it to the "Ready to Review" stage to begin processing the application.

Reviewing an Application

When an application is submitted and in "Read for Review," it can be reviewed and either processed for payment or denied.

Review the applicant's full set of responses.

Enter Payment details to approve application.

Case managers can click the application tab and scroll through the application responses to verify the individual is eligible for the program.

Checking for Duplicate Applications

By default, users are only able to submit one application under their account per year. However, some individuals may create multiple accounts using different emails to submit multiple applications. To ensure individuals don't receive funds more than once per year, there is a report available in the dashboard that flags any potential duplicate accounts created by one user.

Before approving an application, case managers should check the duplicate report to ensure that person has not yet been awarded funds within the year.

If a user is listed on the Duplicates Report, case managers can archive the applications under the duplicate account. To do this search for the duplicate account under "Applicants" and move any of the applications under that account to "Archive" case status. More details about how to do this can be found in the *Analytics Dashboard* training video.

Approving an Application for Payment

If an applicant is eligible, navigate the "Payments" tab and enter $200 as the Approved Amount and click "Save payment."

Once the Approved Amount is entered and saved, the "Initiate Payment" button will be enabled. Click "Initiate Payment" to approve the application for payment.

Approving an Application for Payment

A pop-up screen will appear to review the payment details. Review the information and if everything looks correct, click "INITIATE PAYMENT."

Once the payment is initiated, the applicant will receive a notification that their application was approved and can log back into their account to select their preferred payment option.

The application will be in the "Approved" status until the applicant select a payment method. Then it will move to "Payment Sent."

Payment Methods

The Beam platform provides five different payment methods. The payment methods available within your platform may not include each listed below because they need to be enabled by your institution during the implementation of the program.
FAQ Page

Physical Prepaid Card

Physical Prepaid Card payments require applicants to provide their name and a valid mailing address to receive payment. Prepaid cards are generated and mailed to funding recipients and can take 7-10 business days to arrive, depending on the recipient's location.
Physical Prepaid Card FAQ

Virtual Prepaid Card

Virtual Prepaid Card payments require applicants to create an account on our prepaid card provider Usio's website. A Virtual Prepaid can then be generated to provide funding immediately.
Virtual Prepaid Card FAQ

How would you like to receive your funds?

Please select one option:

○ **Virtual Prepaid Card**
Receive your funds within minutes after creating an Akimbo Now prepaid card account.

○ **Physical Prepaid Card**
Receive a physical prepaid card in the mail within 7 business days.

SAVE AND CONTINUE

Denying an Application

If an applicant is not eligible for the program, their application can be denied. Click "Deny" and a pop-up will appear allowing the case manager to enter a specific reason why their application is being denied.

Applicants will receive a notification with the reason for why their application was denied.

Sending 1-Year Recertification

After one year, applicants are eligible to re-certify and receive another year of transportation benefits. There will be a report available for all applicants eligible to reapply. Review the report and search for each applicant under the "Applicants" section. Click on their name to be taken to their applicant profile.

From the applicant portal, navigate to the "Programs" section and click "SEND REFERRAL" under the Go Card Program- 1 Year Recertification program. The applicant will receive an email notifying them they are eligible to reapply.