



Getting Started with Beam

Program Administrator

2025

beam
Formerly edquity⁷

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.

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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.

The screenshot shows a web form titled "Case Manager Sign In". At the top, there is a shield icon and a "GO CARD" logo. Below the title is an "Email" label and a text input field containing the word "Email". A yellow button labeled "Email a sign in link" is positioned below the input field. Underneath the button, a message reads: "We'll email you a link for a secure password-free sign in. Or you can **enter your password** instead." At the bottom of the form, there is a grey box with an information icon and the text: "Not a case manager? Go to the [Applicant Portal](#) to access your account."

The screenshot shows an email body with the "GO CARD" logo at the top left. The text reads: "Hi Melanie Butron, Click the button below to sign in!". Below this is a blue button with the text "SIGN IN". Underneath the button, it says: "Button not working? Click this link instead!". At the bottom, there is a contact instruction: "Please contact info@101expresslanes.org if you have any questions." followed by "- San Mateo County Express Lanes Joint Powers Authority".

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.

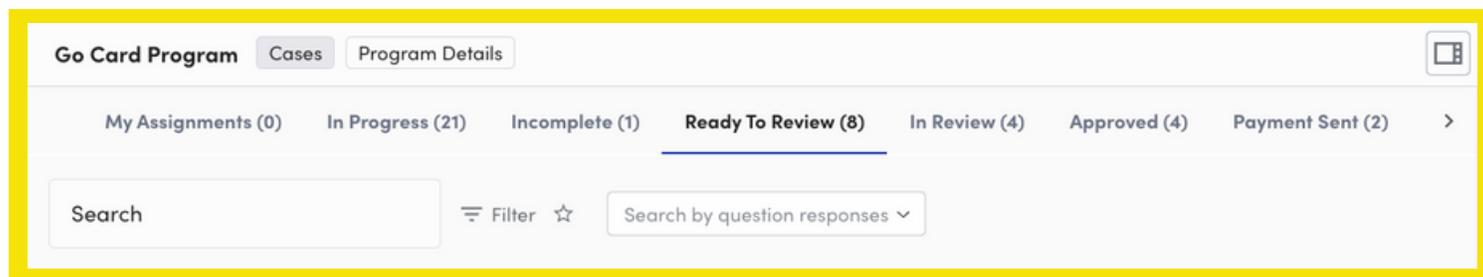
Click into the program name to drill down into applications and their different statuses.

The screenshot displays the Case Manager Dashboard for San Mateo County Express Lanes Joint Powers Authority. On the left is a sidebar menu with categories: Programs, Applicants, Analytics, My assignments, and Saved Views. Under 'Programs', several community service organizations are listed, including Coastside Hope, Daly City Community Servi..., Fair Oaks Community Cen..., Pacifica Resource Center, Puente de la Costa Sur, Samaritan House, Samaritan House South, YMCA Community Resour..., and Other. The main content area is titled 'San Mateo County Express Lanes Joint Powers Authority' and contains two sections: 'Programs' and 'All Cases'. The 'Programs' section shows two summary cards. The first card, 'Go Card Program', has 'VIEW DETAILS' and displays Available Funds (\$10), Obligated Funds (\$3), and Awarded Amount (\$2). The second card, 'Go Card Program- 1 Year Recertification', also has 'VIEW DETAILS' and displays Available Funds (\$10), Obligated Funds (\$3), and Awarded Amount (\$0). The 'All Cases' section features a search and filter bar above a table with columns: Name, Submission Date, Program Name, Case Status, Tags, and Assignee. Two cases are listed: 'Derek Test2' (C000367140) with status 'Incomplete' and tag 'in person', and 'Michaelphone Lodes' (C000367549) with status 'Payment Sent' and tag 'created on mobile'. Both cases are assigned to 'Pending'.

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.

The screenshot shows the 'Go Card Program' interface. The main area displays a table of applicants under the 'Ready To Review (8)' tab. The table has columns for Name, Submitted, Case Status, Payment Status, and Awarded Amount. A sidebar on the right shows 'Program Funding' for the 'Go Card Program- 2025 Fund' with Available Funds of \$10, Obligated Funds of \$3, and Awarded Amount of \$2. Below this, it shows 'Last 7 Days' statistics: Applications Started (11), Applications Submitted (8), In Review (0), Payments Sent (1), Approved (2), and Denied (0). A '+ Add New Applicant' button is highlighted in the bottom right of the sidebar.

Name	Submitted	Case Status	Payment Status	Awarded Amount
Erica Paschke C000367568	07/25/2025	Ready for Review	N/A	N/A
S Palacio C000367569	07/25/2025	Ready for Review	N/A	N/A
Y Suh C000367570	07/25/2025	Ready for Review	N/A	N/A
Michael Lodes6 C000367666	07/29/2025	Ready for Review	N/A	N/A
Michael Lodes7	07/29/2025	Ready for Review	N/A	N/A

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

Create Account for User

* An asterisk indicates a required response

By checking this box you agree to our [Terms of Service](#) and [Privacy Policy](#). *

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.

Go Card Program Cases Program Details

My Assignments (0) **In Progress (22)** Incomplete (1) Ready To Review (8) In Review (4) Approved (4) Payment S >

Search Filter Search by question responses

Name	Last Edited ↓	Case Status	Payment Status	Awarded Amount	Tags	Assignee
<input type="checkbox"/> Beam Test C000368485	08/17/2025	In Progress	N/A	N/A		Pending

Go Card Program > Beam Test

Case Overview Application Payments

Beam Test

Documents + Upload Doc

Case Workflow Details

Created 8/17/2025

Case status In Progress

CHANGE STATUS OR ASSIGNEE

VIEW APPLICANT PROFILE

SEND NEW MESSAGE

Change Status or Assignee

Select a status*:

Incomplete

Ready for Review

In Review

Denied

Withdrawn

Archive

Assignee Unassigned

UPDATE CANCEL

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.

Go Card Program > Beam Test

Case Overview | **Application** | Payments

Beam Test Deny ⋮

Documents + Upload Document

Preview	Document type	Uploaded at	Pinned	Actions
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Notes + Add new note

Activity

- Melanie Butron New Version from 5abf1e6e-843b-4031-94d0-0203622dc578 to 5abf1e6e-843b-4031-94d0-0203622dc578 on 08/17/2025 10:40AM
- Melanie Butron changed status from In Progress to Ready For Review on 08/17/2025 11:05AM

Case Workflow Details

Created: 8/17/2025
Case status: Ready for Review
Case ID: C000368485
Assignee: None
Expedited: No
Submissions: 1
Latest Submission: 8/17/2025, 10:34:38 AM

Applicant details Edit

Name: Beam Test
Beam User ID: U000263433
Phone: Phone not provided
Mailing Address: Not provided
Email: melanie.butron+te...

Tags
Add tag +

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

Go Card Program > Beam Test

Case Overview | **Application** | Payments

A000368469 🔖 🕒 8/17/2025, 10:34:38 AM 🕒 8/17/2025, 11:05:10 AM

Pre Screener

Question name	Field	Response	Actions
Age Limit	Are you 18 years of age or older?	"Yes"	🗨️
Resident Y N	Are you a resident of San Mateo County?	"Yes"	🗨️
Ami	Is your individual annual income less than or equal to 60% of the Area Median Income (AMI) for San Mateo County?	"Yes"	🗨️
Cbo	How did you hear about this program?	"Samaritan House"	🗨️
Cbo	Other CBO	Not answered	🗨️

Enrollment

Question name	Field	Response	Actions
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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.

The screenshot displays the 'Analytics Dashboards' interface. On the left sidebar, the 'Analytics' menu item is highlighted. The main dashboard area is titled 'Analytics Dashboards' and includes a 'Download CSV' button. Under the 'Standard' tab, the 'Duplicates' report is selected. The report shows 'Total Potential Duplicate Users' as 'N/A'. A 'Purpose' section explains that the report surfaces information about possible duplicate applicants and is run daily. Below this is a 'Duplicates Report' table with the following data:

Participating Partner	Record Type	Full Name	User Created At	User ID	Total Apps on Account	Latest Case Status
San Mateo 101 Express Lanes Go Card Program	NO DUPLICATES FOUND	N/A	N/A	N/A	N/A	N/A

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.”

Go Card Program > Beam Test

Case Overview Application **Payments**

Payment Details

After saving the required information below, select the Initiate Payment button at the top of the page.

Available Funds	-	Approved Amount	=	Remaining Funds
\$394.99		\$0.00		\$394.99

Payment

Fund *
Go Card Program-

Approved Amount *
\$

Save payment

Case Workflow Details

Created	8/17/2025
Case status	Ready for Review
Case ID	C000368485
Assignee	None
Expedited	No
Submissions	1
Latest Submission	8/17/2025, 10:34:38 AM

Applicant details [Edit](#)

Name	Beam Test
Beam User ID	U000263433
Phone	Phone not provided
Mailing Address	Not provided
Email	melanie.butron+te...

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

Go Card Program > Beam Test

Case Overview Application **Payments**

Payment Details

After saving the required information below, select the Initiate Payment button at the top of the page.

Available Funds	-	Approved Amount	=	Remaining Funds
\$394.99		\$200.00		\$194.99

Payment

Fund *
Go Card Program-

Approved Amount *
\$ 200.00

Initiate Payment

Case Workflow Details

Created	8/17/2025
Case status	Ready for Review
Case ID	C000368485
Assignee	None
Expedited	No
Submissions	1
Latest Submission	8/17/2025, 10:34:38 AM

Applicant details [Edit](#)

Name	Beam Test
Beam User ID	U000263433
Phone	Phone not provided
Mailing Address	Not provided
Email	melanie.butron+te...

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.”

Initiate Payment

Beam Test

Application ID: A000368469 Payment Submission Date: 08/17/25

Approved Amount: \$200.00

If the above information looks correct, select “Initiate Payment” below to confirm.

WARNING: This action cannot be undone

INITIATE PAYMENT CANCEL

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.”

Go Card Program		Cases	Program Details				
My Assignments (0)		In Progress (21)	Incomplete (1)	Ready To Review (8)	In Review (4)	Approved (5)	Payment Sent (2)
Search		Filter	☆	Search by question responses			
Name	Submitted ↓	Case Status	Payment Status	Awarded Amount	Tags	Assignee	
<input type="checkbox"/> Beam Test C000368485	08/17/2025	Approved	Unclaimed	\$200		Pending	

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.

The screenshot shows the 'Beam Test' application page. The 'Deny' button is highlighted with a yellow box. The page includes sections for Case Overview, Documents, Notes, Activity, Case Workflow Details, Applicant details, and Tags.

Preview	Document type	Uploaded at	Pinned	Actions

Case Workflow Details	
Created	8/17/2025
Case status	Ready for Review
Case ID	C000368485
Assignee	None
Expedited	No
Submissions	1
Latest Submission	8/17/2025, 10:34:38 AM

Applicant details	
Name	Beam Test
Beam User ID	U000263433
Phone	Phone not provided
Mailing Address	Not provided
Email	melanie.butron+te...

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

The 'Reason for Denied' pop-up form contains a text input field with the text 'You are not eligible for this program.' and a character count of 38/600. Below the input field is an information icon and a message: 'Applicants will be notified of the status change and the reason you provide.' At the bottom, there are two buttons: 'MARK AS DENIED' (highlighted with a yellow box) and 'CANCEL'. A mouse cursor is pointing at the 'MARK AS DENIED' button.

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.

Name ↑	Applicant ID	Mailing Address	Email
Beam Test	U000263433	-	melanie.butron+test22@bybeam.co

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.

Applicant Overview

Name	User ID	Phone	Email
Beam Test	U000263433	-	melanie.butron+test...
Mailing Address	Tax ID/SSN	Date Of Birth	
-	-	-	

Programs Applications Payments

Program Name ↑	Program Status	Case Status	Remaining Funds	Referral
Go Card Program	Open	Approved	\$9	-
Go Card Program- 1 Year Recertification	ReferralOnly	Not Applied	\$9	SEND REFERRAL

Items per page: 5 | 1-2 of 2 items | 1 of 1 pages