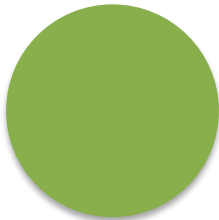# Cal**SAWS** | Welcome to BenefitsCal

Apply – Income and Expenses

DRAFT

Spring 2021

Apply – Income and Expenses
What we heard during our research

Insight

Customers have difficulties entering their income and expenses because they are **not clear about the all the different types of income and expenses** that should be included on the application.

"It's the [wording]… and **they don't know what necessarily counts as income**, so they won't bring the paperwork or provide the correct information." – Assister

"Most [customers] have some sort of sheltering expense, but the way the question is worded they put 'no' a lot of the time. **99% of the time they aren't entering their information about shelter expenses, but they do have them**." – Caseworker

Apply – Income and Expenses
Feature Highlights and Usability Testing Insights

New Design Highlights

- Self-Employment Questions – improved.
- No Income or Expenses – given a nudge based on their situation.
- Improved flow – first select income/expense type, then select individual receiving.
- Monthly Income and Expenses – automatically calculated on summary screens for easier review.
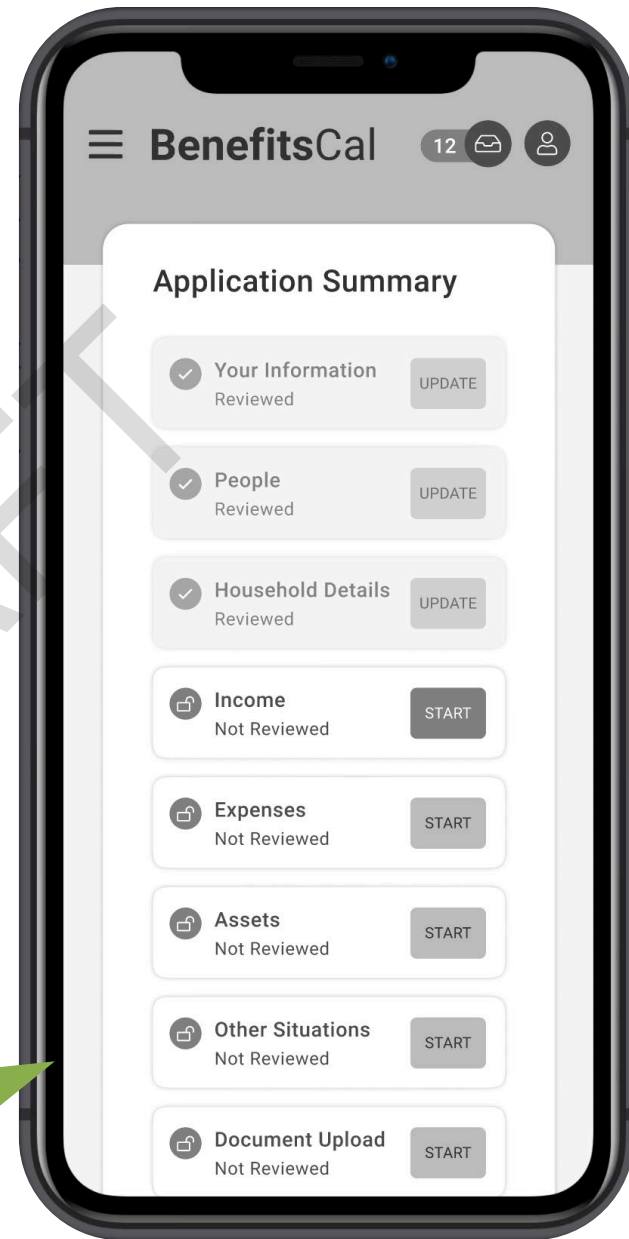- Income and Expenses – added help text.

Impact: Goals and Outcomes

- Summary Screens – help customers to review and confirm accuracy.
- Encourage – customers to enter more information with nudges.
- Improve Information Accuracy – with help text.

"I like how it has **all the extra options** [for income]. I think the **title and description explains everything well.** I think that will help out a lot of people." – Customer

"[The summary screen is] very clear, it's **going to make sure you know what you are doing.** Can't be mistaken." – Customer
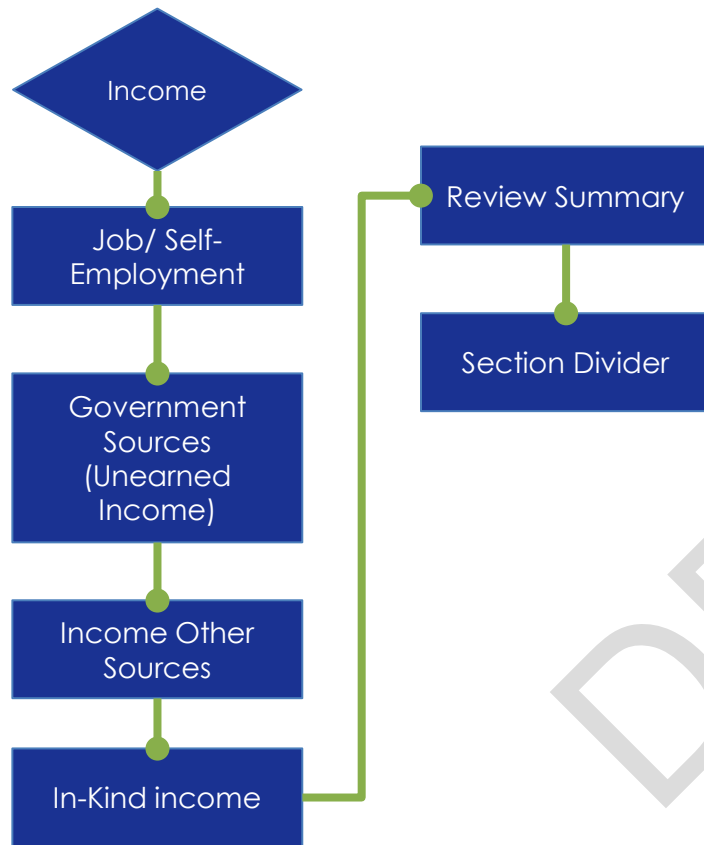
"I think it is **very self-explanatory and with the small descriptions** I think it helps with the deduction sections. I think it will be very easy for the customer to get through the verbiage is good." – County Worker
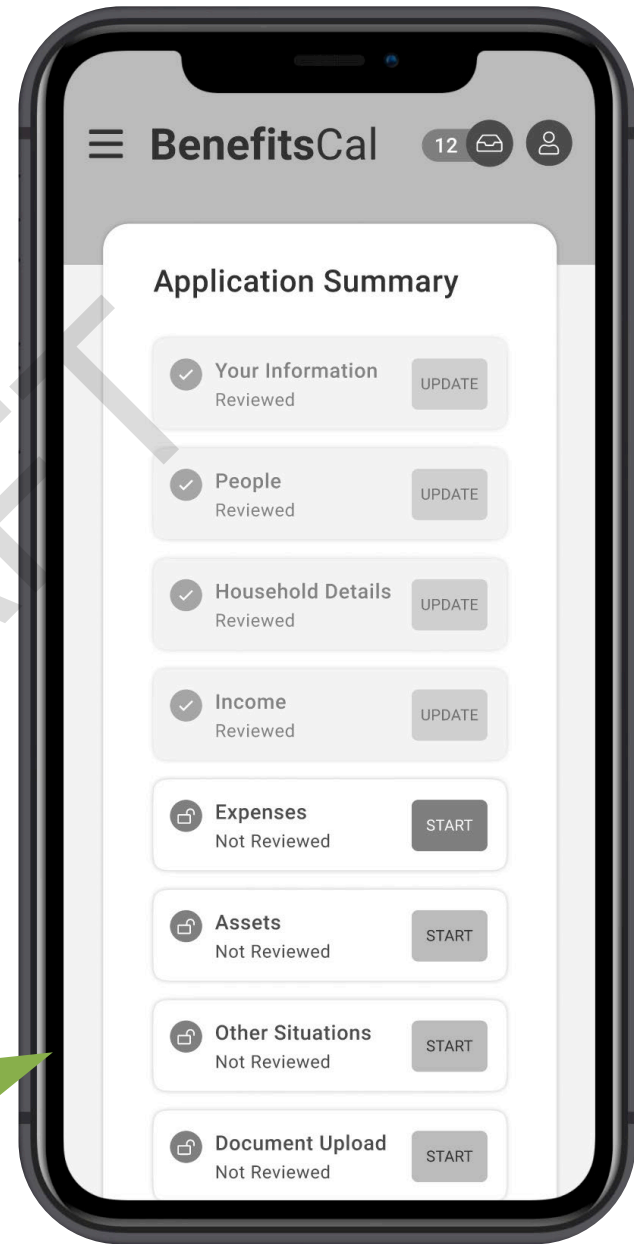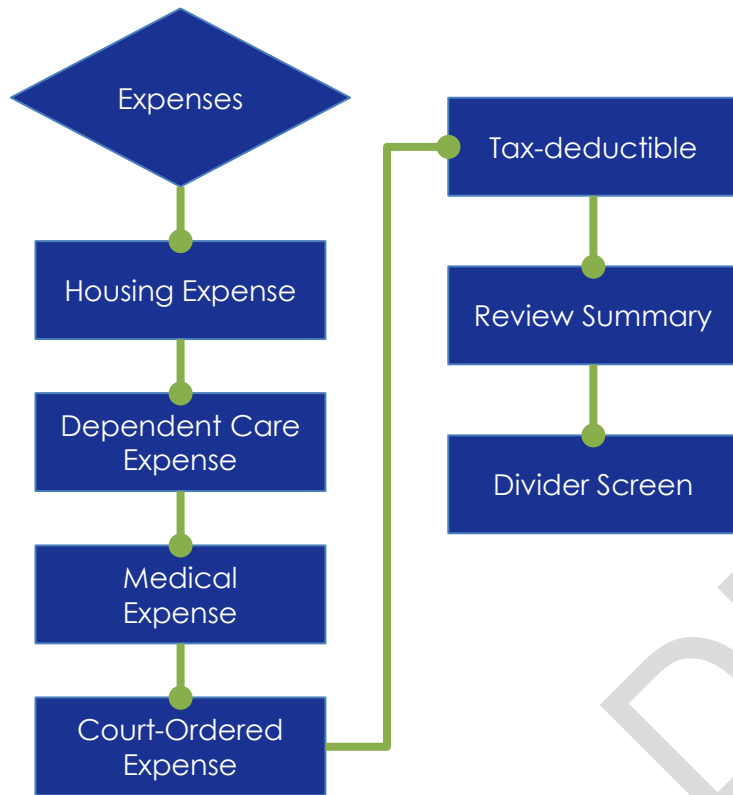
Apply – Income
Demo


```
         ┌─────────────┐
         │   Income    │
         └──────┬──────┘
                │
      ┌─────────┴─────────┐              ┌──────────────────┐
      │  Job/ Self-       │              │ Review Summary   │
      │  Employment       │              └────────┬─────────┘
      └─────────┬─────────┘                       │
                │                        ┌─────────┴─────────┐
      ┌─────────┴─────────┐              │ Section Divider  │
      │  Government        │             └──────────────────┘
      │  Sources           │
      │  (Unearned         │
      │  Income)           │
      └─────────┬─────────┘
                │
      ┌─────────┴─────────┐
      │  Income Other      │
      │  Sources           │
      └─────────┬─────────┘
                │
      ┌─────────┴─────────┐
      │  In-Kind income   │
      └───────────────────┘
```

BenefitsCal   12

Application Summary

✓ Your Information — Reviewed — UPDATE

✓ People — Reviewed — UPDATE

✓ Household Details — Reviewed — UPDATE

🔓 Income — Not Reviewed — START

🔓 Expenses — Not Reviewed — START

🔓 Assets — Not Reviewed — START

🔓 Other Situations — Not Reviewed — START

🔓 Document Upload — Not Reviewed — START

Hover on the image to play video

DRAFT

Apply – Expenses
Demo