

CalSAWS |

CSPM-67119: BenefitsCal Document Upload for Users with No Account



10/03/2023



Current Design


Customers and CBOs can only upload documents by logging into their accounts in BenefitsCal





Business Requirement

Allow BenefitsCal users to upload documents through BenefitsCal without an account





Proposed Solution

Proposed Solution

Design Considerations

- Align as closely as possible with the existing Document Upload feature but also **provide enough help to guide customers who aren't familiar** with the BenefitsCal interface
- **Provide points of access** to the Anonymous Document Upload flow that make sense in the customer's journey (whether they're in the application process or want to manage their benefits with renewals, SAR7s, etc.)
- Use this as an opportunity to **nudge customers to create accounts** in BenefitsCal to manage their benefits on an ongoing basis.

Proposed Solution

Points of Access

BenefitsCal unauthenticated users will be able to access the documents from the following areas in the application:

- Homepage – Apply for Benefits
- Homepage – Manage my Benefits
- Help Center
- Chatbot

Proposed Solution

Upload Step 1 – User enters details

1 2 3

Tell us about your document.

Are you uploading a document for an application or a case?

Application Number

Case Number

BenefitsCal Application Number (required)

11231243

You can find this on your confirmation receipt.

County (required)

Sonoma

Enter details about who you're uploading this document for.

First Name

Last Name

Date of Birth (required)

Select the type of document you're uploading. You'll choose your file(s) on the next step.

i Upload one document type for each application/case and person at a time. This helps us to track the files you upload.

If you need to submit more than one document type, you'll complete these steps for each one.

Document Type (required)

- Select One -

This is important! Be specific about which document you are uploading. This will help us to get your document to the right caseworker.

1. User enters Application or Case number and county
2. User enters First name, Last name and DOB of person the document is for
3. User selects the Doc type

Proposed Solution

Upload Step 2 – BenefitsCal and CalSAWS validate entered details

1. If user entered Application number, BenefitsCal will validate that the application number is a valid application for the County and DOB matches with at least one individual on the application.
2. If user entered Case number, BenefitsCal will call CalSAWS API to validate that the case number is a valid case for the County and DOB matches with at least one individual on the case.

Proposed Solution

Upload Step 3 – User uploads file and gets confirmation

Select the files for this document.

Document Details

Case or Application Number	<Case or Application Number>
County	<County>
First Name	<First Name>
Last Name	<Last Name>
Date of Birth	<Date of Birth>
Document Type	<Document Type>
Notes	<Notes>

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SELECT FILES

- Each file cannot be more than 8MB.
- Make sure your files aren't encrypted or password protected. This is important so your caseworker can open and review your document.

Your document was uploaded!

Confirmation Receipt

<DD/MM/YYYY>	<HH:MM A>
<Case/App> Number	<Number>
County	<County>
First Name	<First Name>
Last Name	<Last Name>
Document Type	<Document Type>
File(s)	FileName.jpg FileName.jpg

Notes
<Notes>

Save your confirmation

[Text](#) | [Email](#) | [Download](#)

UPLOAD ANOTHER DOCUMENT

Want to create an account?

If you create an account, you can stay on top of your benefits and requirements by:

- Viewing your benefits details
- Reading electronic notices
- Tracking statuses and reminders
- And more

[Create an account.](#)

1. User selects files to upload against the document type.
2. User gets the confirmation receipt for the uploaded documents.
3. User is nudged to create an account