



# Document Upload Tips

This BenefitsCal Quick Guide (QG) provides the end-user with information about documents uploaded through the BenefitsCal Self-Service Portal.

The QG can be used as a training medium for the following situations:

- For displaying BenefitsCal functional processes and changes

The QG may include functional instructions, as well as screenshots from BenefitsCal. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

## BenefitsCal Process

In BenefitsCal customers can upload documents so they can be accessed by their County worker.

This guide provides information on the following topics:

- Document upload options
- Case and Person Level Documents
- Workers accessing uploaded documents

## Document Upload Options

BenefitsCal provides customers with various ways to upload documents. These include:

- Logged in User Upload
- Anonymous User Upload
- e-Application Submission
- Two-Way Messaging Response

Once documents are submitted, they cannot be accessed again by the customer in BenefitsCal. The documents are sent to CalSAWS to be associated with a case or person.

### Logged in User Upload

Customers who have a BenefitsCal account linked to their CalSAWS case can login and upload documents from their BenefitsCal Dashboard by clicking the Upload Documents button. This is the preferred method to upload documents, since this ensures documents are linked to the correct case.



## Your Documents

Submit documents for your applications and cases.

**UPLOAD DOCUMENTS**

View which documents you've uploaded in the past.

[I want to see my document upload history.](#)

When using this option:

- They must be logged into their BenefitsCal account
- Select the appropriate case number when submitting the documents
- A Confirmation Code is generated after the document upload is completed, which can be provided to the County Worker when they request a Receipt Number to help them locate the uploaded documents

## Anonymous User Upload

Customers who do not have a BenefitsCal account can still upload documents through the BenefitsCal Homepage by clicking the Upload Documents button.

### Need to upload a document?

Without an account, you can still upload documents for your application.

**UPLOAD DOCUMENTS**


When using this option:

- No BenefitsCal account needed, just an Application Number or Case Number  
**Note:** The customer must ensure that the correct application or case number is entered so that documents get routed appropriately. Otherwise, the County would need to submit a ticket along with the confirmation number to help them locate and associate the documents correctly.
- A Confirmation Code is generated that can be provided to the County Worker when they request a Receipt Number to help them locate the uploaded documents

## e-Application Submission

Documents can also be uploaded when submitting an e-application by clicking the Start button on the Document Upload section of the e-application submission flow.





**Document Upload**  
Not Reviewed

Start

After clicking the Start button, the upload documents page displays suggested document types to upload or the option to upload additional documents.

## Here are some suggested documents to upload.

Based on your responses, we suggest you upload documents from the list below or add any additional document.

Not sure what to upload?  
[Let's look at some examples](#)

You can submit your Application now and upload documents later if needed.

Need help? Contact the county office.

①

**Proof of Identity**  
Reggie Apple (35)

Upload

①

**Citizenship/Immigration/Birth Certificate**  
Reggie Apple (35)

Upload

Want to add another document that isn't listed here?

+

ADD ANOTHER DOCUMENT

<

Next



When uploading documents through an e-application:

- Documents that are submitted through an e-application do not move to the case or selected person until the e-application is linked to the case
- An Application Number is generated to help track the e-application and uploaded documents  
**Note:** The e-app must be submitted in BenefitsCal for the images to transfer to CalSAWS. If a customer starts an e-app and uploads documents but does not actually submit it, the documents do not get sent to CalSAWS and no confirmation number is generated for the customer for the document upload.

## Two-Way Messaging Response

Customers who are logged in to their BenefitsCal account can also upload documents by replying to a message they receive from their worker requesting a specific document.

For two-way messaging upload:

- This option is only available in Counties that have opted in to this functionality
- The request for the document is sent by the County worker through an Action Message

## Case and Person Level Documents

Documents that are uploaded through BenefitsCal get associated with a case or at the person level after processing, depending on the type of document. When submitting person level documents for a person who is not already on the case, the customer is required to select a different person on the case (typically the primary applicant). After the document is processed, it is associated with the person selected and needs to be reassociated with the correct person after they have been added to the case.

- Case level documents
  - Are only associated with the specific case selected and not a particular person
  - Can only be seen by the County where the case resides
- Person level documents
  - Are associated with the specific person selected
  - Continue to be associated with the person when they move to a different County
  - Can be viewed through the All Person Archived drawer

The following document types are person level documents and are automatically associated to the person selected when they are submitted through BenefitsCal:

- Proof of Income
- Proof of Disability
- Rent/Lease/Mortgage
- Proof of Financial Assets and Accounts
- Proof of Vehicle Registration
- Citizenship/Immigration/Birth Certificate
- Proof of Identity
- Immunization
- Utilities/Household Expenses
- School Verification
- Tax Documents
- Social Security Benefits



All other document types are considered case level documents and are associated with a case.

## Workers Accessing Uploaded Documents

After documents are submitted, BenefitsCal sends them to CalSAWS. Depending on how they are submitted they can be accessed in different ways:

- Point of Service link on the Case Summary page – Displays documents submitted within the last 90 days
- Images button on the Case Summary page - Displays up to 500 of the most recent documents captured
- Images button on data collection pages – Displays documents that correspond to data collections based on the document type selected
- Conducting a search through the CalSAWS Imaging Solution – Allows for search criteria to be entered to locate documents
- Images button on the e-Application Summary page – Only for documents submitted through an e-Application

If the County is having trouble locating the uploaded documents, provide them with the following information so they can conduct a search:

- Confirmation Code

<b>Your documents were uploaded!</b>	
<b>Confirmation Receipt</b>	
06/18/2025	09:48 am
Confirmation Code	2994

- Application Number (for e-applications)



**Congrats! We received your application. Next, let's complete your interview.**



**Application Submitted**

[Save a copy of your application](#)

2

**Complete your interview**

We'll reach out to you with information about your interview time and date. Keep in mind, the number calling might be blocked or unknown. We might also send you a letter via US mail with the details of the interview.

**Confirmation Receipt**

06/19/2025

01:57 pm

Application Number

115722

- Date and time of document upload
- Document Type selected
- Person Name and Date of Birth associated with the document