

BenefitsCal | Quick Guide: Upload Documents

Uploading Documents with a BenefitsCal Account

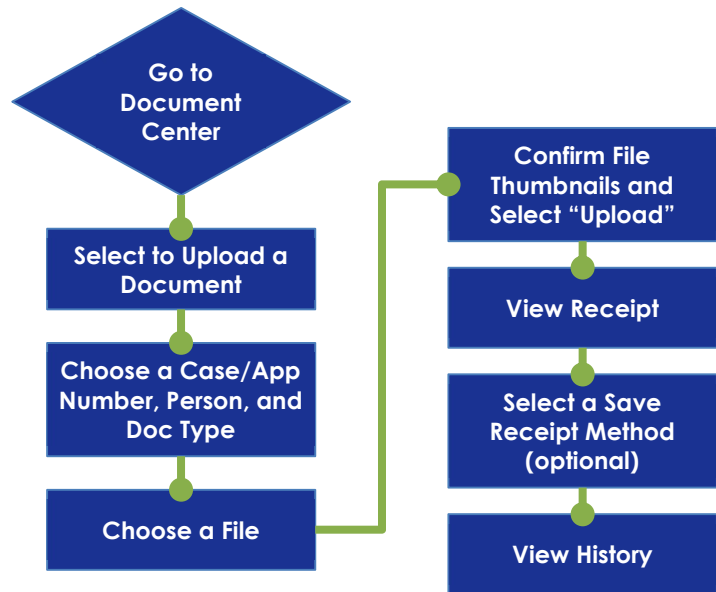
Purpose

The purpose of the BenefitsCal Quick Guide is to provide instructions to assist customers with uploading documents in BenefitsCal.

BenefitsCal displays the documents that are needed for customers for quick reference.

An uploaded history shows what was uploaded in the past twelve months and allows the customer to print the receipt of documents uploaded.

High-Level Process Flows



FAQs

Q: Can a mobile phone be used to take pictures/upload documents?

A: Yes, document upload works on both mobile phones as well as desktop computers. Select the **How to get a good photo** hyperlink for hints on taking better photos with your mobile phone.

Q: Can I view documents previously uploaded?

A: No, a receipt of the document is available, but the document itself is not accessible to view.

Q: Can I upload a document without logging into BenefitsCal?

A: You can upload documents to a case or a submitted application on BenefitsCal without logging in to your account. See the section below – **Uploading Documents Without a BenefitsCal Account**.

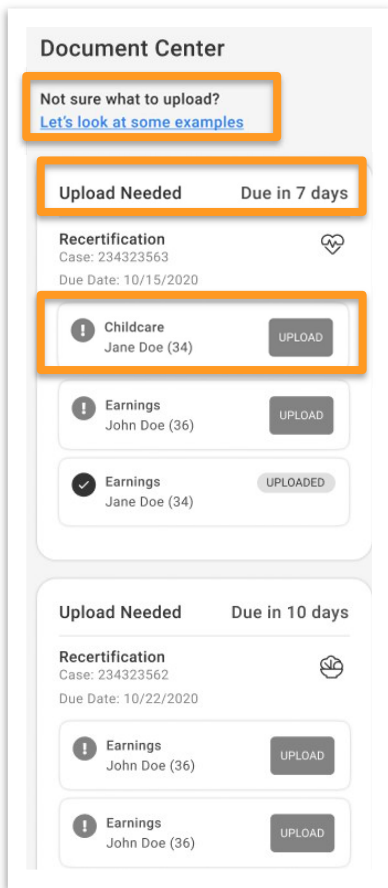
Q: I forgot to save a receipt for documents uploaded last week, how can one get a receipt?

A: Upload History keeps a record of documents uploaded in the last 12 months for documents uploaded using a BenefitsCal account.

Q: The wrong paystub was uploaded; can it be deleted?

A: Before uploading, any document can be removed by clicking the **Remove** hyperlink, however once a document is uploaded, it cannot be removed. It is sent to CalSAWS for processing.

1



Document Center

The Document Center displays:

- ✓ Let's look at some examples
- ✓ Documents needed for upload, by case and individual

Click the **Let's look at some examples** hyperlink to view examples of documents.

Click the **UPLOAD** button on each tile to upload a document type for each individual.

2

Upload Document

Case or Application Number (required)
- Select One -

Person (required)
- Select One -

Document Type (required)
- Select One -

CHOOSE A FILE
Each file cannot be more than 8MB.

How to get a good photo?

To get a good photo, use bright light and put your paper on a flat, dark surface. Also, use your phone if it has a camera.

UPLOAD

Select to Upload a Document

Select a value from the following required fields:

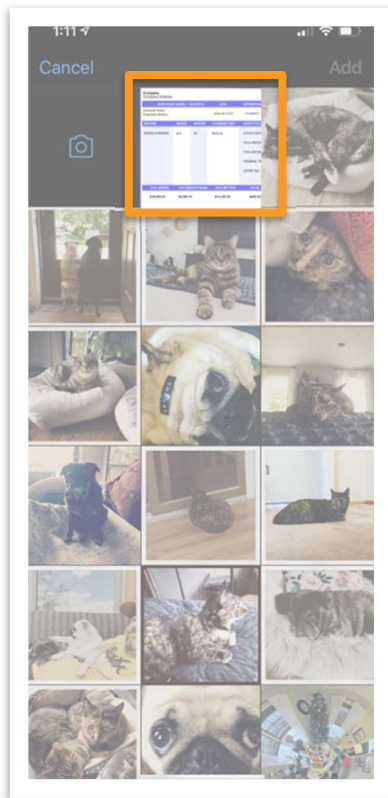
- ✓ Case or Application Number
- ✓ Person
- ✓ Document Type

Click the **CHOOSE A FILE** button and select the file to upload.



The **How to get a good photo** hyperlink provides hints for taking better photos with your mobile phone.

3



Select File

From a mobile phone, click a photo to upload.

From a desktop computer, select a photo file.

The following formats can be uploaded: .GIF, .GIFF, .JPEG, .JPG, .JPE, .JIF, .MDI, .BMP, .PNG, .TIF, .TIFF, .TXT, .RTF, .ONE, .ONETOC, .PDF, .DOC, .DOCX, .DOX, .PAGES, .ODT, .WPD, .XLS, .XLSX, .PPT, .PPTX, .PSD, .EPS, .AI, .LOG, .WPS



Maximum size for upload is 8 MB per file.

The screenshot shows a mobile application interface for uploading a document. The form is titled "Upload Document" and contains several required fields, each with a dropdown arrow:

- Case or Application Number (required):** 234323563
- Person (required):** John Doe (36)
- Document Type (required):** Photo ID/Social Security Card

Below the form, it states "Your 3 files are ready to upload." and lists three image files:

- IMG_583748.jpg (Remove)
- IMG_583749.jpg (Remove)
- IMG_583750.jpg (Remove)

A button labeled "CHOOSE ANOTHER FILE" is highlighted, with a note below it: "Each file cannot be more than 8MB." Below this is a section titled "How to get a good photo?" with a dropdown arrow and a tip: "To get a good photo, use bright light and put your paper on a flat, dark surface. Also, use your phone if it has a camera."

At the bottom of the form, there is a back arrow and a large "UPLOAD" button, both highlighted with orange boxes.

Confirm File Thumbnails and Select "Upload"

Confirm the following required fields are complete:

- ✓ Case or Application number
- ✓ Person
- ✓ Document Type

Confirm images are ready to upload.

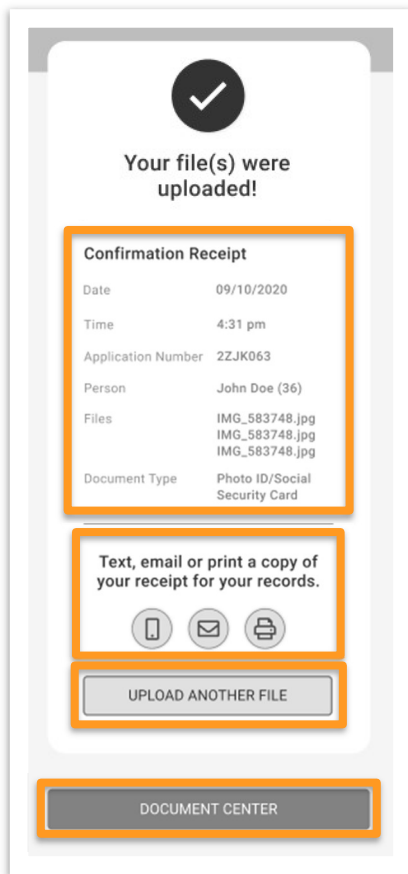


An image may be removed by clicking the **Remove** hyperlink.

Use the **CHOOSE ANOTHER FILE** button to upload additional files.

Click the **UPLOAD** button.

5



View Receipt

A confirmation receipt is available that includes the following:

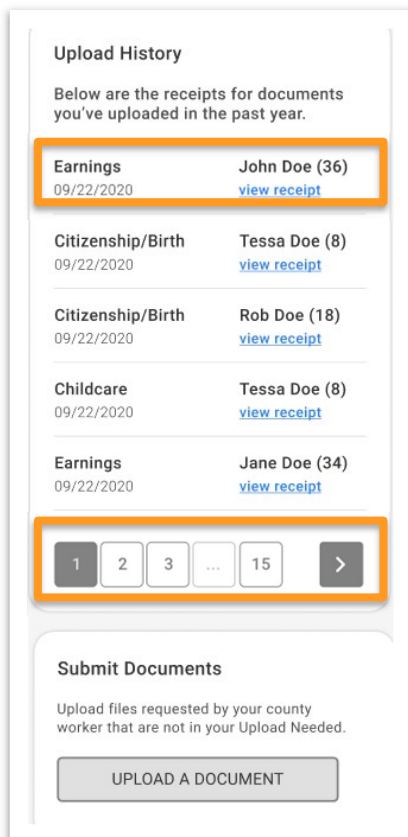
- ✓ Date/Time
- ✓ Application/Case Number
- ✓ Person
- ✓ Files
- ✓ Document Type

Select a save receipt method (text, email, or printed) to save a copy of the receipt.

Select the **UPLOAD ANOTHER FILE** button to upload another file.

Select the **DOCUMENT CENTER** button to return to the document center.

6



Upload History

Upload History displays a list of documents uploaded within the past year. The document type, date, and individual displays.



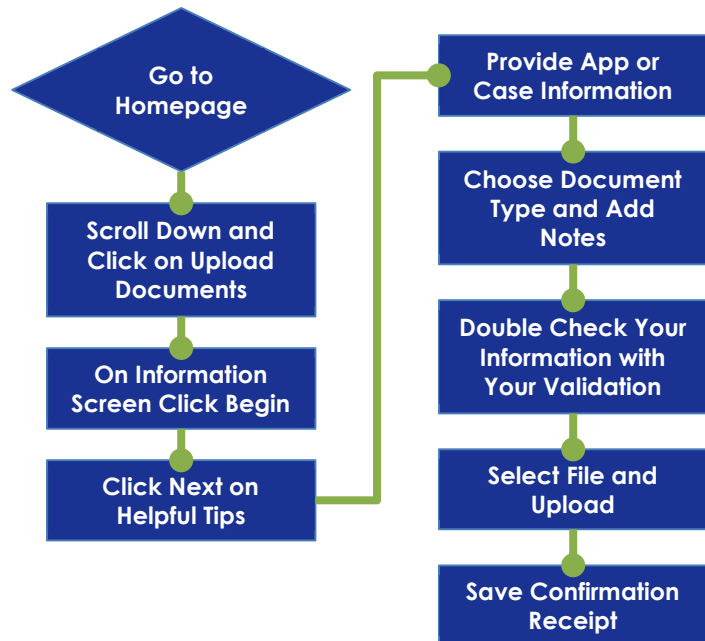
Select the **View Receipt** hyperlink to view a copy of the receipt for that document. The document itself will not display.

Uploading Documents Without a BenefitsCal Account

PurposeError! Reference source not found.

The purpose of the BenefitsCal Quick Guide is to provide instructions to assist customers with uploading documents in BenefitsCal without a BenefitsCal account.

High-Level Process Flows



FAQs

Q: Can a mobile phone be used to take pictures/upload documents?

A: Yes, document upload works on both mobile phones as well as desktop computers. Select the **How to get a good photo** hyperlink for hints on taking better photos with your mobile phone.

Q: Can I view documents previously uploaded without a BenefitsCal account?

A: No, an upload history is not available on upload actions without a BenefitsCal account.

Q: How can I upload a document without logging into BenefitsCal?

A: Navigate to the BenefitsCal homepage, then scroll down to the **Need to upload a document?** section and click the **UPLOAD DOCUMENTS** button.

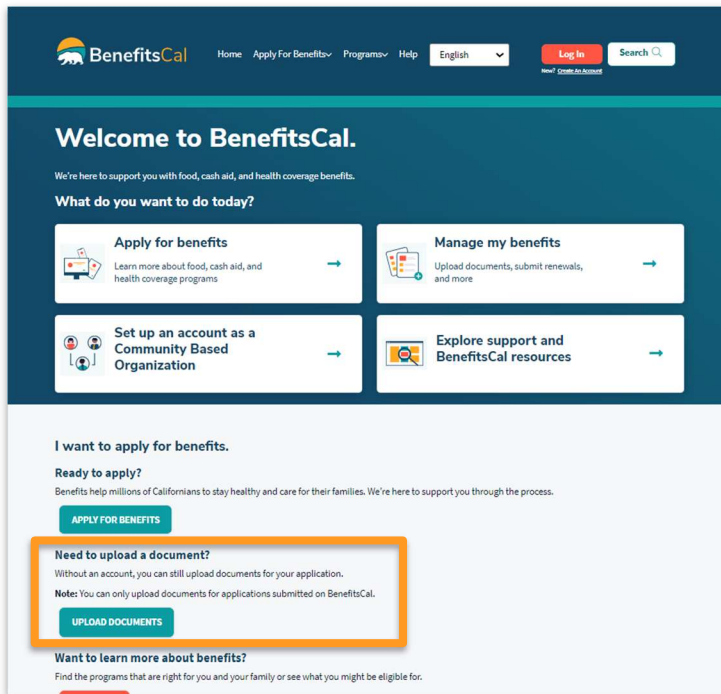
Q: What will I need to upload a document without an account?

A: The case or application number, county, first name and last name, date of birth, and document type.

Q: The wrong paystub was uploaded can it be deleted?

A: Before uploading, any document can be removed by clicking the **Remove** hyperlink, however once a document is uploaded, it cannot be removed. It is sent to CalSAWS for processing.

1



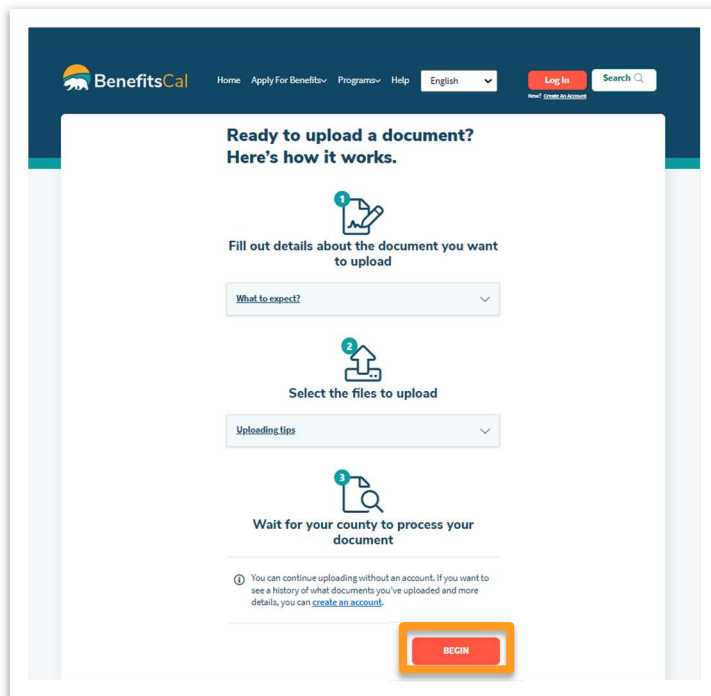
BenefitsCal Homepage

The BenefitsCal homepage displays:

- ✓ Need to upload a document?

Select the **UPLOAD DOCUMENTS** button.

2

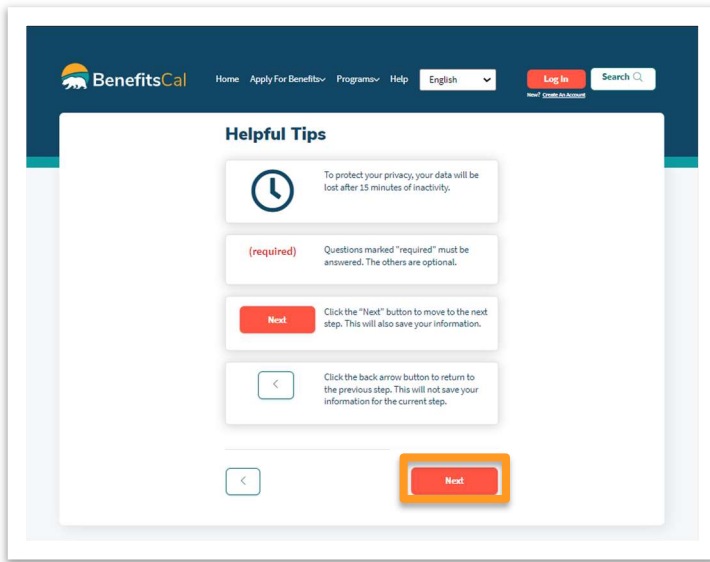


Information Page

Users will then be navigated to an information screen explaining the upload process.

Click the **BEGIN** button to start the process.

3



Helpful Tips

Users will then be shown a screen with some helpful tips to aid them with the process of uploading their documents.

After reading the information, users can click the **Next** button to continue the process of uploading their documents.

Tell us about your document.
Are you uploading a document for an application or a case?

Application Number
 Case Number

Beneficial Application Number required

County required
Select One

Enter details about who you're uploading this document for.
If this document isn't for a specific person on the case, enter details for

First Name
Last Name
Date of Birth required
MM/DD/YYYY

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

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 sure to select which document you are uploading. This will help us to get your document to the right case/corner.

Notes

Tell us about your Document.

Users will then be asked to provide the following details:

- ✓ Case or Application Number
- ✓ County
- ✓ First Name and Last Name
- ✓ Date of Birth
- ✓ Document Type

5

Date of Birth required

.....

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

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

Proof of identity

This is important! Be specific about which document you are uploading. This will help us find your document to the right case/court.

Notes

255/255

Next

Tell us about your Document.

Users can also add any notes about the documents they are uploading in the **Notes** field.

Click the **Next** button.

6

Let's double check!

The case/application number, court, and date of birth you entered don't match the information we have.

Case or Application Number: 1202201
Court: Los Angeles
Date of Birth: 01/01/1985
To edit, select "Correct my information"

Correct my information

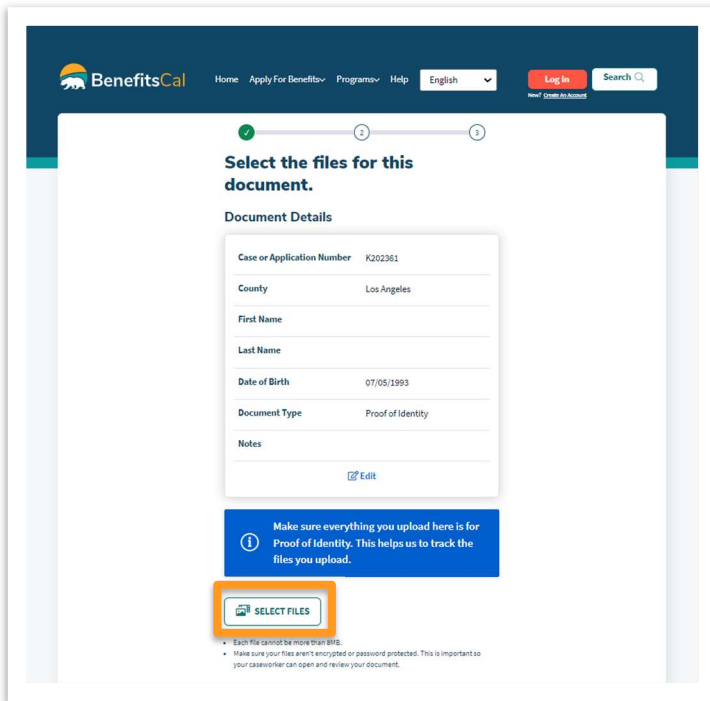
Validate

BenefitsCal will run a validation against the information the user entered. If the information entered does NOT match what BenefitsCal (for uploads to an application) or CalSAWS (for uploads to a case) has on record, the user will be shown a pop-up asking them to correct the information they have entered.



After the user has entered the correct information and BenefitsCal has validated that the information matches what is on record, the user will be navigated to the next screen in the process.

7



Select Files

The user will be shown a copy of the information they entered on the previous screen. When they are ready to select a file for upload, they can click the **SELECT FILES** button.

From a mobile phone, click a photo to upload.

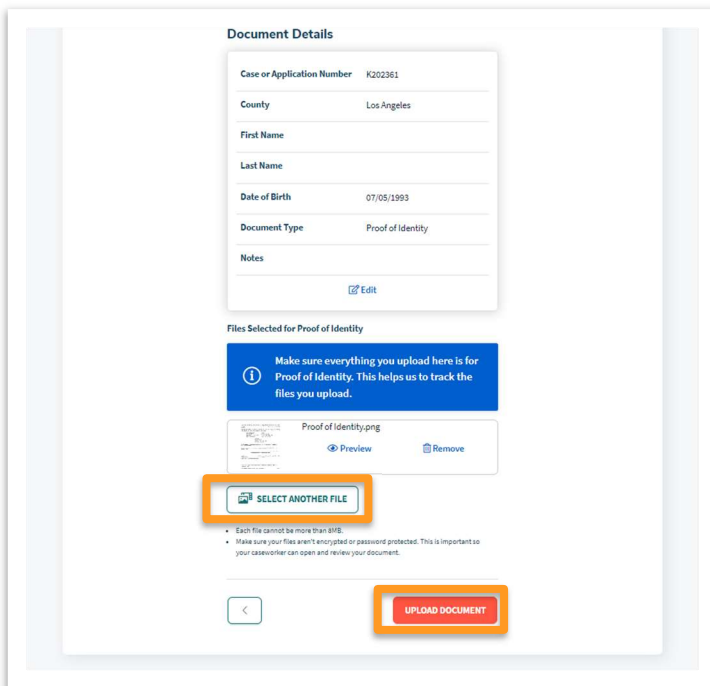
From a desktop computer, select a photo file.

The following formats can be uploaded: .GIF, .GIFF, .JPEG, .JPG, .JPE, .JIF, .MDI, .BMP, .PNG, .TIF, .TIFF, .TXT, .RTF, .ONE, .ONETOC, .PDF, .DOC, .DOCX, .DOX, .PAGES, .ODT, .WPD, .XLS, .XLSX, .PPT, .PPTX, .PSD, .EPS, .AI, .LOG, .WPS



Files must be smaller than 8 MB **AND NOT** encrypted or password protected.

8



Confirm File Thumbnails and Select "Upload"

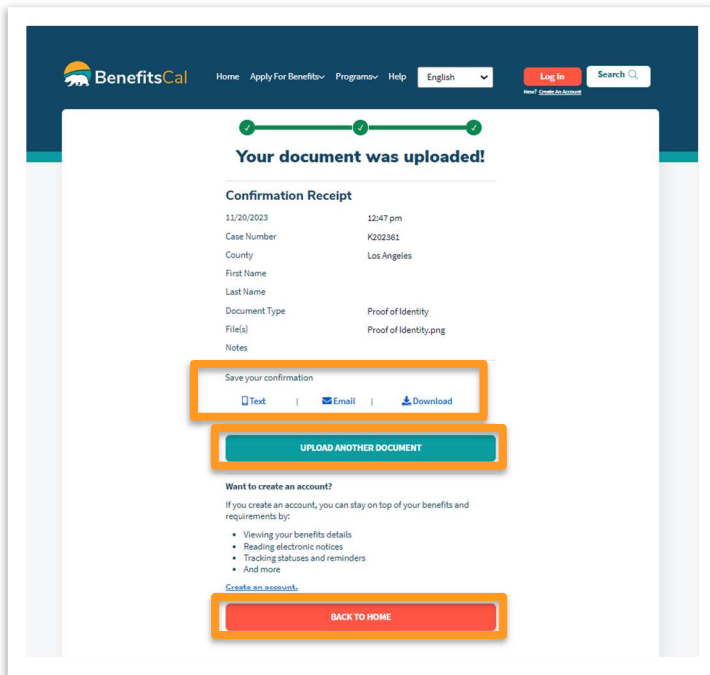
After selecting the file(s) they would like to upload, the user can choose to upload another file by clicking the **SELECT ANOTHER FILE** button.

Confirm images are ready to upload.



An image may be removed by clicking the **Remove** hyperlink.

Once the user has selected all files, they can upload their document(s) to a case or application by clicking the **UPLOAD DOCUMENT** button.



Confirmation Receipt

Users will then see a confirmation receipt informing them that their document has been successfully uploaded. They can save a copy of this confirmation for their records via text, email, or downloading a copy of the receipt.



Users can choose to upload more documents by clicking the **UPLOAD ANOTHER DOCUMENT** button, which will take them back to Step 4, or they can return to the BenefitsCal homepage by clicking **BACK TO HOME**.