Pre-assessment — family benefit file

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Birth registered on the 4th · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. *Pre-assessment is everything that precedes the decision: checking membership, gathering the documents, checking their validity and cross-matching the elements that must agree.* **The decision itself is the opening of the entitlement, and it belongs to the caseworker.**

What the file handed over contains

Element	State	Source
Membership of the agricultural scheme	**Checked, with its effective date**	Contributions branch
Household composition	**Updated, agreeing with last year's declaration**	Birth certificate filed on the 4th
Reference income	**Gathered — tax assessment filed in February, valid until September**	**Contributions branch — there is no reason to ask for it again**

Element	State	Source
Missing document	**Bank details in the household's name**	**Letter written, example attached, it goes out from the caseworker**

What stays with the caseworker, and why it is a strength

Opening the entitlement is decided and signed by the caseworker, because it commits the fund and is open to appeal. **It is that signature that makes the decision reasoned and challengeable, therefore defensible before the member and before a court** — and it is taken on a complete file handed over in minutes.

The time this shifts

Item	Before	With the agent	Over the year
Pre-assessing a benefit file	**60 % of the file's time — 24 minutes**	**10 % — 4 minutes**	**6,000 hours across 18,000 files**
Time to notify the member	**31 days**	**9 days**	—

What is proposed next

Measure	Volume concerned	Effect
Pre-assessment triggered on filing, without being asked	**11,400 files out of 18,000 — those whose documents are all already at the desk**	**The file waits for the caseworker complete, the same morning**

> **No unread value is ever written.** A missing document never becomes “probably provided”: the file states what is missing, where the agent looked and who holds it, with the request already drafted.

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To be settled by the fund

Branches where automatic pre-assessment goes live first: _____

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https://bluelemonagent.ai/en/secteur-public/metiers/agent-ia-gestionnaire-msa

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