



Pre-assessment — family benefit file

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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.

To be settled by the fund

Branches where automatic pre-assessment goes live first: _____

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