Below are a few helpful tips for screening clients on Bridge to Benefits.

1. Login

- Log in using assigned username and password. If you do not log in, you won’t be able to retrieve data on the screens you complete.

2. Starting the screen

- Begin screening tool by clicking on the “Screening Tool/Advanced” portion of the blue dashboard bar at the bottom of the page. Please note “Screening Tool” and “Advanced” are two separate links.

3. Disclaimer

Before you begin the actual screen, it is important to inform clients that the screening tool:
- does not apply to the programs for clients
- does not guarantee clients will be able to get help
- does not ask for identifying information

4. Who are you helping?

- Be clear on who you are helping. Most of the time, choosing “a client, customer or family that I work with” will be your choice, but remember to click “just playing” if you are practicing or exploring the tool. If you don’t choose that option when it is a test, the data will be skewed.
5. Describe your living situation

- If your client is married but does not live with a spouse, select “Single.”
- If client is living with the parent of their child but is not married, select “Unmarried and living with the parent of one or more of my children.”
- If the client is living with a boyfriend or girlfriend but do not have children in common, select single and run the tool for each person.

6. Taxes

- Tax questions are only asked to determine eligibility for health care programs. Clients must file taxes to be eligible for Minnesota Care and Advance Premium Tax Credits (APTCs) and must file jointly if married.

7. Entering ages of children

- When you are entering ages for children, you only need to enter months for a child under age one.
- If you have more than three children, click on “add additional children.”

8. Income

- Do not add commas or decimal points when entering income.
- For spouses, add income together.

9. Multiple households

- It is possible to have 2 separate households living under the same roof if expenses and meals are not shared. Add people here only if they share expenses and live as one household.
10. Results

✓ One or more persons in the household may be eligible for programs. The screening tool does not determine which individuals are eligible.
✓ Benefits are ESTIMATES only.

11. One-on-one referral option

✓ Most of the programs offer more than one way for clients to apply. The Personal Application Plan allows clients the opportunity to select how they want to apply. The Final Application Plan will then provide additional information on the specific options selected.
✓ When available, the one-on-one option is the default selection. One-on-one means the client can receive one-on-one assistance from a community based organization to fill out the application and complete the application process. This option must be selected to trigger the email referral page. Because clients often have difficulty completing the application, one-on-one is the recommended option along with using the email referral.
✓ Only the application options that are available for each program can be selected. The options that are not available are grayed out. Energy Assistance accepts applications from October through May each year. The print and mail option will only be available to select during those months.

12. Deselect referral agencies

✓ On the referral email page, all the organizations that accept email referrals in the county selected are listed and checked. Deselect a referral agency if your client does not want his or her information sent to that particular agency. Hitting send will deliver an email referral to all the agencies checked.
13. Send an email referral

Please fill out as much of the email referral information as your client is comfortable providing.

- Best time to contact helps the agency know when the clients are most likely available. If the agency knows your client works mornings, they will call after work.
- If there is further information that would be of assistance to the agencies, type it in the “notes” box. For example, “This family is highly mobile. Contact them at xxx-xxx-xxxx until Tuesday. After that they will likely be at XYZ shelter. The shelter’s number is xxx-xxx-xxxx.”

10. Helpful Reminders

- You must complete the personalized application plan, email referral page and get to the Final Application Plan for screen to be complete.
- Hit “Start Over” in the upper right hand corner when done with one screen and ready to begin another. By clicking “Start Over,” the information you entered for the previous screen will be cleared.

If you have other helpful tips you would like added to this sheet, contact Elaine Cunningham | 651-855-1176 or ecunningham@childrensdefense.org