

Helpful Screening Tips

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 or have full access to the e-mail referral feature. If you forget your username or password email Natletha Sumo at nsumo@childrensdefense.org.

Partners Login

Username

Password

Login

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. You may also click on one of the two green buttons at the top of the page.

Screening Tool (Advanced)

Logout

Screen with helpful descriptions and details to assist in answering questions.

Screen using one-page version. Recommended to use once you are familiar with tool.

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

WHAT THIS SCREENING TOOL CANNOT DO:

This screening tool **does not apply** for programs for you. If you appear eligible for one or more programs, you will still have to apply for each program by mail, online or in person. It explains the options you have to apply and, in many cases, helps you find someone to help you complete the application.

This screening tool also **does not guarantee** that you will be able to get help. It is a good guess. The only way you will know if you qualify is for you to apply to each program.

Last, this screening tool **does not ask** for any personal information that could identify you. It cannot tell who you are by your answers. Your privacy is protected.

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.

Who are you helping?

- ☐ I am linking to this site from the online application ApplyMN
- ☐ Myself or my family
- ☐ A client, customer or family that I work with
- ☒ I'm just playing with the screening tool

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.

Describe your living situation.

- ☐ Single
- ☐ Married, living with my spouse
- ☒ Unmarried and living with the parent of one or more of my children

6. Taxes

- ✓ Tax questions are only asked to determine eligibility for health care programs. Answer the tax questions regarding how the client plans to file taxes for the current year. Clients must file taxes to be eligible for Minnesota Care and Advance Premium Tax Credits (APTCs) and must file jointly if married.

Do you plan to file taxes?

- ☐ No
- ☒ Yes

If you do not plan to file taxes you will not be eligible for the health care programs MinnesotaCare and Advanced Premium Tax Credits.

If you are married, select yes if you plan to file taxes jointly with your spouse (married filing jointly). If you are married and do NOT plan to file jointly (married filing separately), then select no. If you are married, you must file jointly to be eligible for MinnesotaCare and Advanced Premium Tax Credits.

7. Entering ages of children

- ✓ When entering ages for children, only enter months for a child under age one.
- ✓ If you have more than three children, click on "add more children."
- ✓ Count your biological/adopted children and any children who live with you and you financially support more than halftime.

Indicate the ages of your children.

You only need to indicate your child's age in months if the child is under age 1. Otherwise years only are acceptable.

Age of your first child:

Age of your second child:

Age of your third child:

[Add More Children](#)

8. Income

- ✓ Do not add commas or decimal points when entering income.
- ✓ For spouses, add income together. Unmarried partners will be prompted to enter income separately.

Enter the amount of money, before taxes and deductions, you make from work.

\$

This is earned income (gross). If self-employed, use net income. Include wages and tips. Add up income for you and your spouse (if married).

Do not include income for an unmarried parent of any of your children or your boyfriend/girlfriend even if that person lives with you.

Do not include income from your children who are in school.

9. Multiple households

- ✓ It's 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.

Not counting anyone you counted in the previous questions, how many other people live with you? Only list people who share meals and expenses.

It is okay if these people are not related to you. Examples are a boyfriend or girlfriend, a grandparent, a friend's child, etc.

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.

Results For You and Your Family

[Start Over](#)

You or someone in your household may be eligible for the program(s) listed below. Please select "On This Program" if you are already enrolled in a program. Select "Not Interested" if you are not interested in applying for a program. If you want more information about the programs listed below, just click "I want more program information." If you're ready to apply, click the green "I want to apply" button.

Note that Benefit Amounts are estimates only. Your actual benefit amounts may be different than the amounts listed here. These amounts are broad estimates based on the information you provided for this screening tool. In determining benefit amounts, most of the programs look at more information than is requested here. Only the administering agency can tell you your actual benefit amount.

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. 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.

Energy Assistance Program			
<input checked="" type="radio"/> One-on-One	Apply Online	<input type="radio"/> Print & Mail-In	Call for Appointment
MinnesotaCare			
<input checked="" type="radio"/> One-on-One	<input type="radio"/> Apply Online	<input type="radio"/> Print & Mail-In	Call for Appointment

12. Select referral agencies

- ✓ On the referral email page, all the organizations that accept email referrals in the county selected are listed with the programs for which they receive referrals. Sometimes the agency name will appear twice because they have different referral recipients for different programs. You must select (check) each referral organization for the programs for which your client wants assistance. Hitting send will deliver an email referral to all the organizations checked.

Referral Recipients

☒ Portico Healthnet

MinnesotaCare, Medical Assistance for Children

☐ Minnesota Valley Action Council

Energy Assistance Program, Supplemental Nutrition Assistance Program (SNAP)

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-xxxxxxx until Tuesday. After that they will likely be at XYZ shelter. The shelter's number is xxx-xxx-xxxx."
- ✓ You must at least enter name and phone number but can provide more contact information. The agency will call them first, usually within a couple days, and if they can't reach by phone they will follow up by email or address. They're required to follow up within two weeks but typically do within a few business days. Remember to tell your client to expect contact from the agencies where you send referral(s).

Family Information

Name

Address

Phone Number

Email Address

Best Time to Contact

Preferred Language

Notes

SEND

14. 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.


BRIDGE TO BENEFITS
Another Way Children's Defense Fund Helps Strengthen Families

Personalized Application Plan

Medical Assistance for Children - Free Health Care Coverage
One Health Care Program application can be used to apply for Medical Assistance for all households members who appear eligible.
Contact the assistance agency to get one-on-one assistance applying for Medical Assistance for Children.

(Start Over)

If you questions or other helpful tips you would like added to this sheet, contact Natletha Gorpu Sumo | 651-855-1175 or nsumo@childrensdefense.org

