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.

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.

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. 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.

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.

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.

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.
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

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 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.

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.
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).

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.

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