



Screening Consumers

Quick Reference Guide
September 2018

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Quick reference guides are created by the instructional design team at MNsure. Please email MNsure_MNsureTraining@state.mn.us for any questions, requested changes or updates.

Screening Consumers Guide Overview

The more time you spend learning about a consumer's situation, the better you can ensure you are the right resource, and that a consumer will receive the help they need. The purpose of this guide is to provide you with a series of question banks. We recommend you use these questions to create your own intake form/s for the populations you work with.

Consumer situations can vary, so you may not be able to have a one-size-fits-all way to ask questions. However, as an assister, you do need to make sure you are asking for the minimum amount of personal information that is needed. For more information on this, visit the [Terms and Privacy](#) page on MNsure.org.

Getting to Know the Consumer

What is your preferred language?

What is your legally recorded name? What should I call you?

What pronouns do you use?

How did you hear about MNsure?

Do you currently have any specific health care needs?

What are your health insurance goals?

Have you worked with a MNsure assister before?

Questions to Confirm Past Applications, Accounts or Access to Other Health Insurance Options

Have you or anyone in your household already submitted an application this year or in the past with MNsure?

Has anyone in your household already created a MNsure account on MNsure.org?

If yes, do you know your MNsure login information?

Does anyone in your household have Medical Assistance or MinnesotaCare?

Does anyone in the household have another type of health insurance?

If yes, is the insurance through a job?

- If yes, what is the monthly premium you would pay to enroll only the employee?
- If yes, who else in the household can get on this insurance plan?

Does anyone in the household have a job that offers health insurance that they are **not** enrolled in?

- If yes, what is the monthly premium you would pay to enroll only the employee?
- If yes, who in the household can get on this insurance plan?

If you are employed, does your employer offer insurance to you or your spouse at any time in the year?

Is there anyone in the household who receives disability benefits?

Is anyone in the household a college student?

Personal Information Questions

What is your legally recorded name?

What is your legally recorded gender?

Is anyone in your household pregnant?

Citizenship Questions

For coverage through MNsure, the people applying for health insurance must be Minnesota residents. Are all the people in your household one of the following?

- U.S. citizen
- U.S. national
- Lawfully present in the U.S.

Do you (the applicant) have a social security number?

If No, have you applied for a social security number?

For more information, see the Citizenship and Immigration guide on Assister Central.

Household Size Questions

Who all lives with you?

How are they related to you?

Who is included on your tax return?

Is there anyone outside your house who you claim as a dependent on your taxes?

(If only minor children applying for coverage) Who would you like to be the primary applicant for your child/ren?

Income Questions

What is the approximate **annual** income of your household? Do you expect any changes to that in the next year?

What is your current total **monthly** income, including all household members?

We will need to report every source of income in your household on the application. Are you able to provide:

- All taxable income, such as wages from a job, Social Security benefits (but not SSI), self-employment income, unemployment, retirement/pension income, alimony, interest/dividends, and more.
- Some types of nontaxable income, such as foreign earned income, interest income and non-taxable Title II Social Security benefits.
- Do not include Supplemental Security Income (SSI), child support, worker's compensation or veteran's benefits.