

The Job Aid explains how partners can use MI Bridges to manage their organization. Partners and MDHHS staff can use the information in this Job Aid to assist partners with managing their organization.

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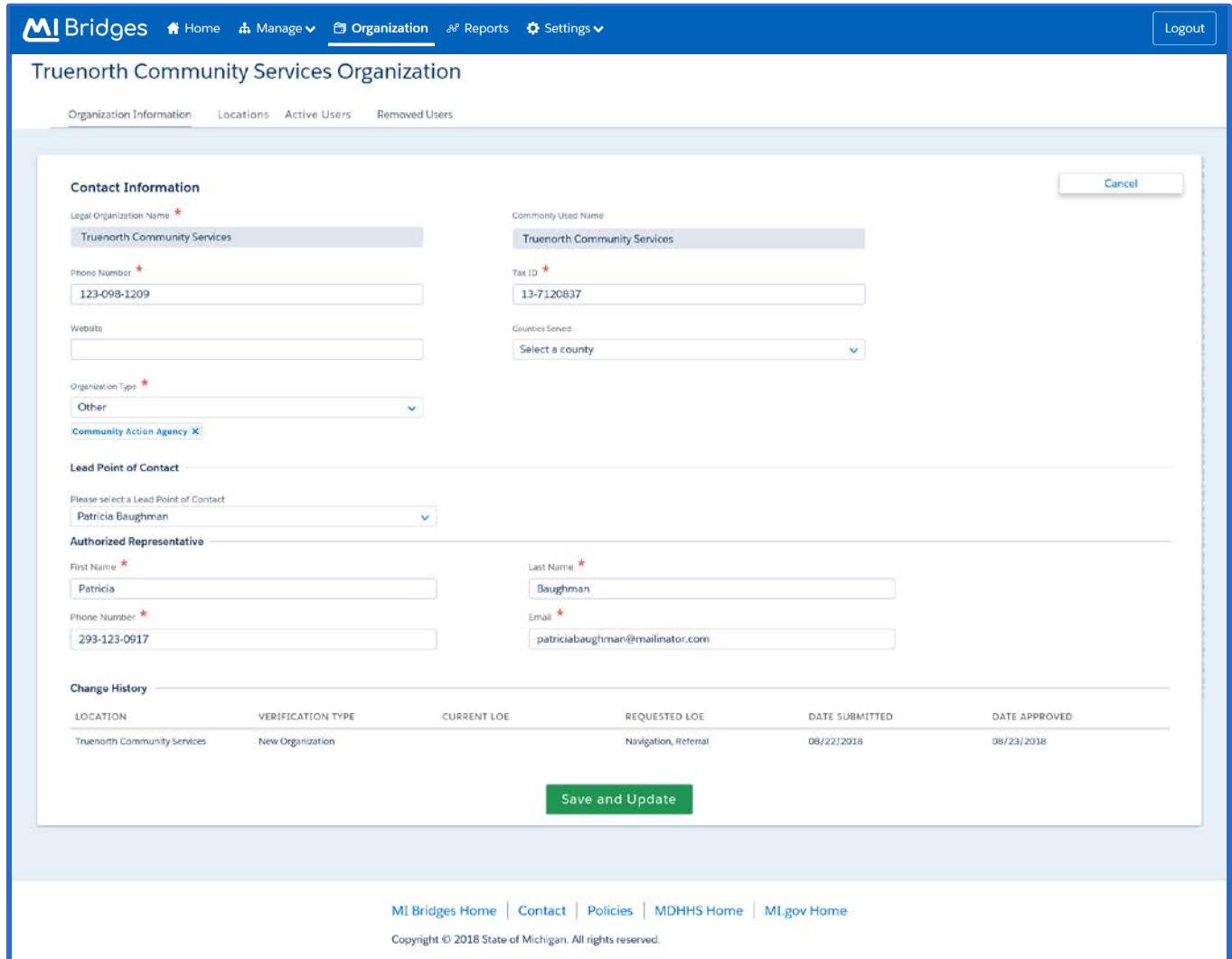
Important Information

With MI Bridges, there are many features built specifically for partners who have the manage organization permission, such as:

- **Organization Information:** Partners have the ability to edit their organizations phone number, tax id, organization type, lead point of contact, authorized representative, etc. from their manage organization menu.
- **Add A Navigator:** Partners who have the Manage Organization permission have the ability to add a new navigator to their organization.
- **Add A New Location:** Partners who have Manage Organization permission can add a new location to their organization if they have multiple locations.
- **Partner Preferences:** Partners can customize their settings from the partner settings menu.
- **Add, Remove or Reassign a Client:** Partners who have the Manage Organization permission can add, remove or reassign a client to navigators within their organization on the Active Users page.

Manage Organization

1. From the Navigation Bar, click **[Organization]**. The **Manage Organization** page displays.



The screenshot shows the 'Manage Organization' page for 'Truenorth Community Services' in the MI Bridges system. The page is divided into several sections:

- Contact Information:** Includes fields for Legal Organization Name (Truenorth Community Services), Commonly Used Name (Truenorth Community Services), Phone Number (123-098-1209), Tax ID (13-7120837), Website, and Organization Type (Other). A 'Community Action Agency' checkbox is checked.
- Lead Point of Contact:** A dropdown menu shows 'Patricia Baughman' selected.
- Authorized Representative:** Fields for First Name (Patricia), Last Name (Baughman), Phone Number (293-123-0917), and Email (patriciabaughman@mailinator.com).
- Change History:** A table with columns: LOCATION, VERIFICATION TYPE, CURRENT LOE, REQUESTED LOE, DATE SUBMITTED, and DATE APPROVED. The table contains one entry for 'Truenorth Community Services' with a 'New Organization' verification type, 'Navigation, Referral' requested LOE, and dates of 08/22/2018 and 08/23/2018.
- Buttons:** A 'Cancel' button is in the top right, and a green 'Save and Update' button is at the bottom center.

At the bottom of the page, there are links for 'MI Bridges Home', 'Contact', 'Policies', 'MDHHS Home', and 'MI.gov Home', along with a copyright notice: 'Copyright © 2018 State of Michigan. All rights reserved.'

2. To edit organizational information, click **[Edit]**. The fields on this page become active.
3. After editing information click **[Save and Update]**. The edits save.

Locations

1. Click the **[Locations]** tab. The **[Locations]** page displays.

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2. Click **[Add New Location]**. The **New Organization** fields display.
3. Type a **Name of Location, Physical Address, City, County, State, Zip Code**, and **Level of Engagement**.
4. Click **[Save and Update]**. The new location saves.

Active Users

1. Click the **[Active Users]** tab. The **[Active Users]** page displays.

How To Manage Your Organization

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Truenorth Community Services Organization

Organization Information | Locations | Active Users | Removed Users

Manage, edit and view current users and their information.

Lead Point of Contact Search...

CPID	NAME	PERMISSIONS	NO. OF CLIENTS	LOCATION	TRAINED
PENDING	Pending User	Navigator	0	6308 S Warn...	Not Trained
174580-002	Patricia Baughman	Navigator, Referral, Users, Metrics	6	6308 S Warn...	Trained: 08/02/2018

+ Add New User

2. Click **[Add New User]**. The **New User** fields display.

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MI Bridges | Home | Manage | Organization | Reports | Settings | Logout

Truenorth Community Services Organization

Organization Information | Locations | Active Users | Removed Users

Manage, edit and view current users and their information.

Lead Point of Contact Search...

CPID	NAME	PERMISSIONS	NO. OF CLIENTS	LOCATION	TRAINED
PENDING	Pending User	Navigator	0	6308 S Warn...	Not Trained
174580-002	Patricia Baughman	Navigator, Referral, Users, Metrics	6	6308 S Warn...	Trained: 08/02/2018

First Name: _____ Last Name: _____

Email: johnsmith@abc.com

Role/User Permissions
You may only select roles that match the organization's Level of Engagement.


Provide Navigation Manage Referrals Manage Organization
 View Metrics

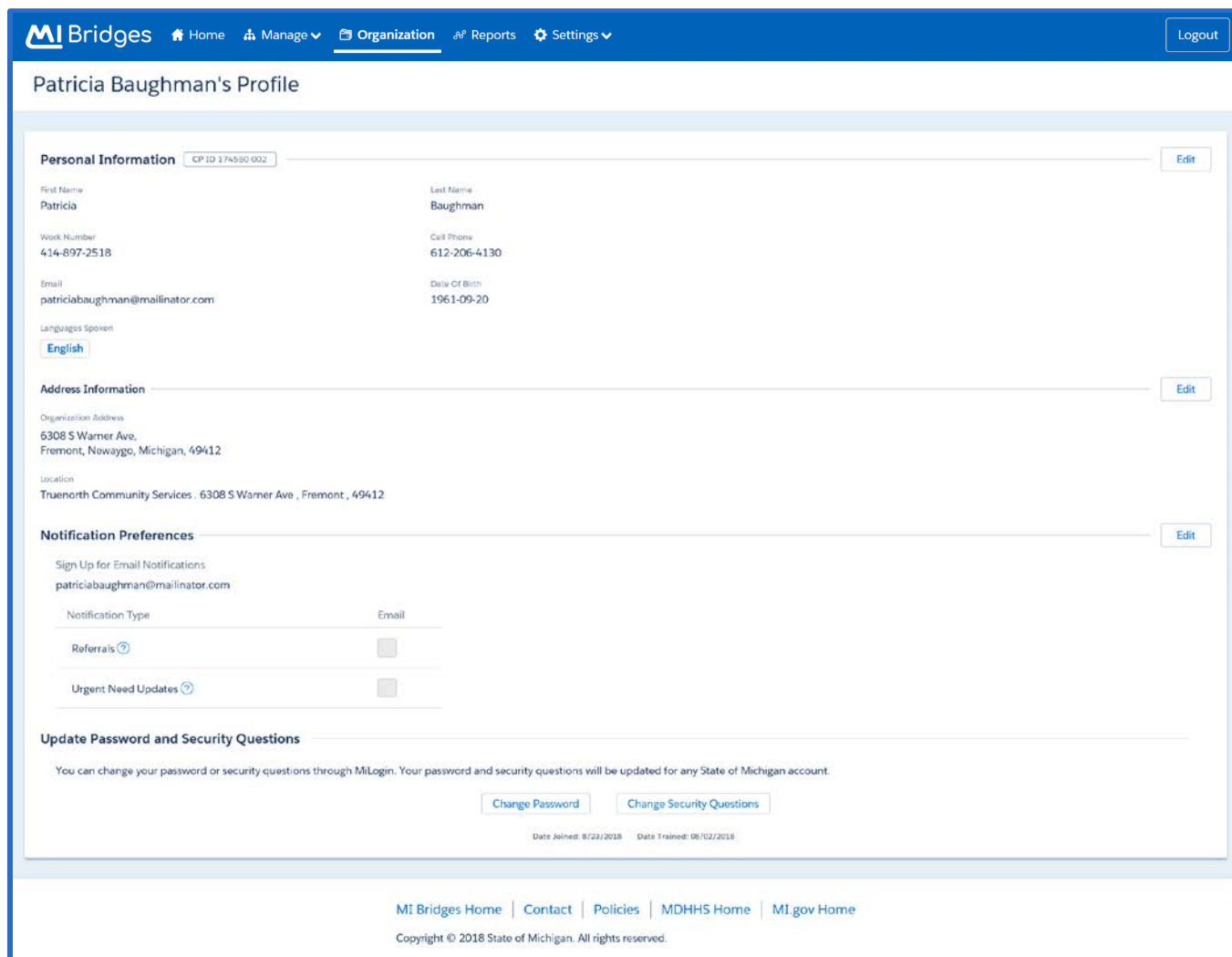
Cancel Add User

How To Manage Your Organization

3. Enter the new user's **First Name**, **Last Name**, and **Email**.
4. Check the **box** next to the permissions you want your new user to have.

Partner Preferences

1. From the partner dashboard, click  the **Preferences** page displays.



MI Bridges Home Manage Organization Reports Settings Logout

Patricia Baughman's Profile

Personal Information CP ID 174580 002 Edit

First Name Patricia	Last Name Baughman
Work Number 414-897-2518	Cell Phone 612-206-4130
Email patriciabaughman@mailinator.com	Date Of Birth 1961-09-20

Languages Spoken
English



Address Information Edit

Organization Address
6308 S Warner Ave,
Fremont, Nowaygo, Michigan, 49412

Location
Truenorth Community Services - 6308 S Warner Ave , Fremont , 49412

Notification Preferences Edit

Sign Up for Email Notifications
patriciabaughman@mailinator.com

Notification Type	Email
Referrals 	<input type="checkbox"/>
Urgent Need Updates 	<input type="checkbox"/>

Update Password and Security Questions

You can change your password or security questions through MiLogin. Your password and security questions will be updated for any State of Michigan account.

Change Password Change Security Questions

Date Joined: 8/23/2018 Date Trained: 08/02/2018

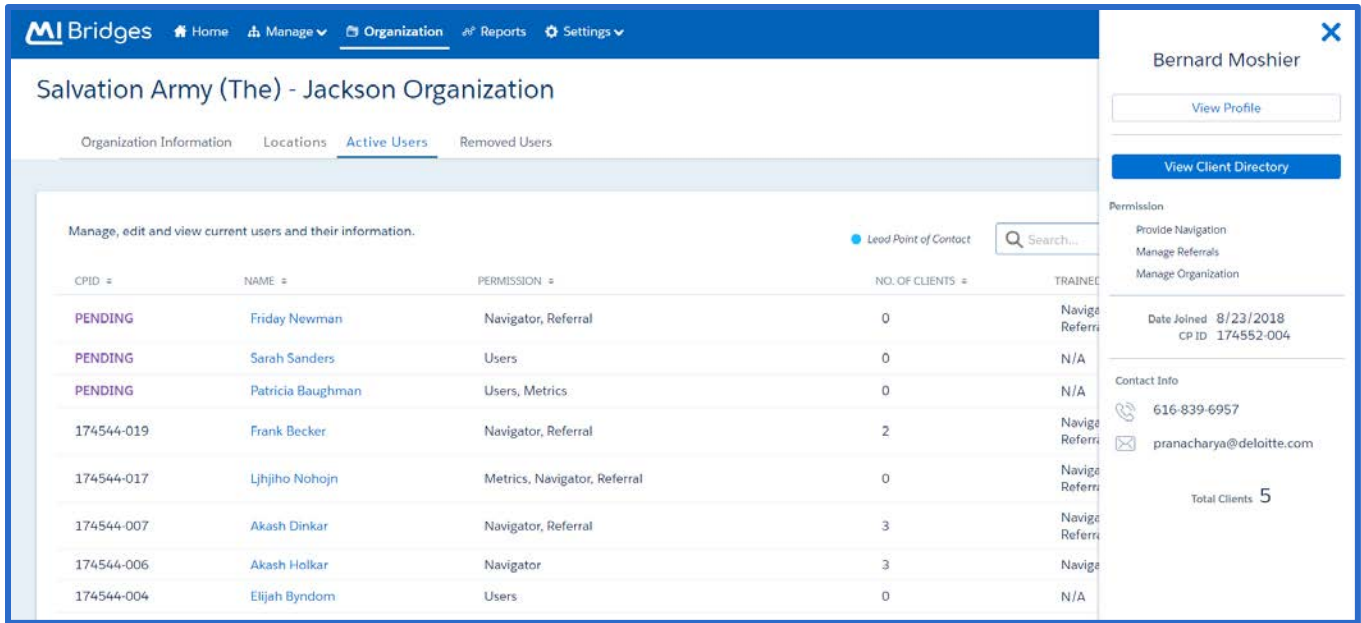
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2. Click **[Edit]**. The Personal Information, Address Information, and Notification Preferences fields activate.
3. Click **[Save and Update]**. The new information saves.

Add, Remove or Reassign a Client

1. From the partner dashboard select **[Organization]**.
2. Select **[Active Users]**.
3. Select the name of a navigator with a CPID.

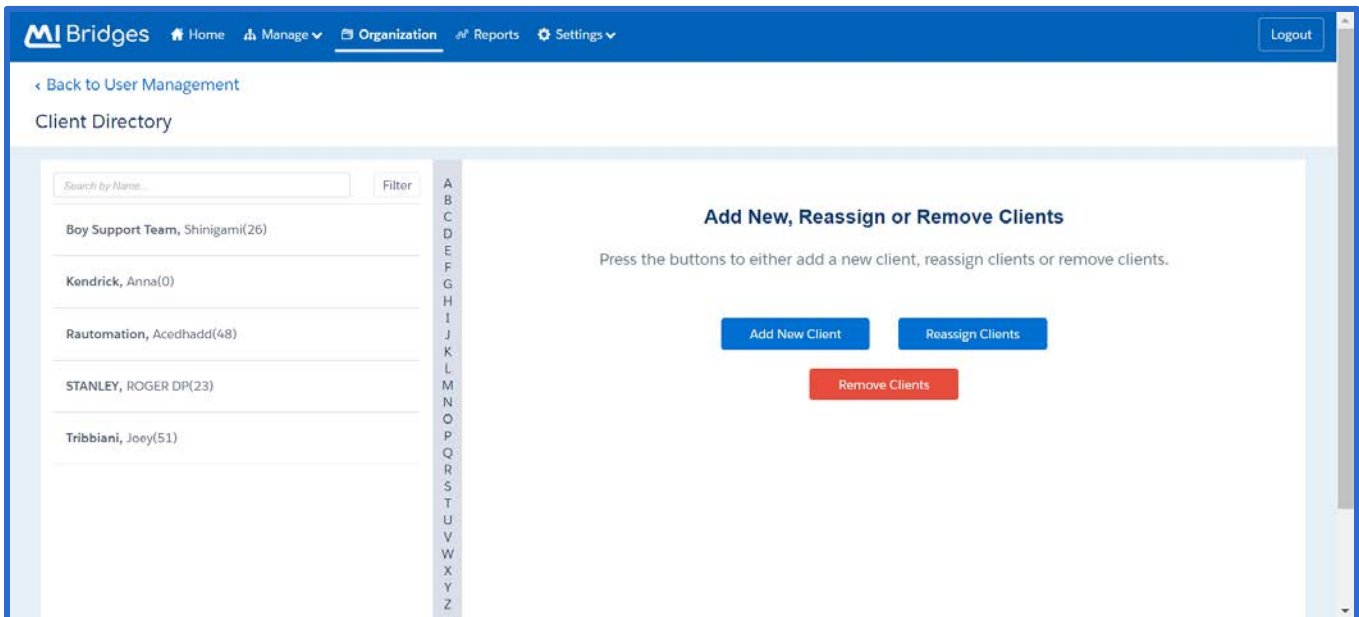


CPID	NAME	PERMISSION	NO. OF CLIENTS	TRAINED
PENDING	Friday Newman	Navigator, Referral	0	Navigation, Referrals
PENDING	Sarah Sanders	Users	0	N/A
PENDING	Patricia Baughman	Users, Metrics	0	N/A
174544-019	Frank Becker	Navigator, Referral	2	Navigation, Referrals
174544-017	Ljhijho Nohojn	Metrics, Navigator, Referral	0	Navigation, Referrals
174544-007	Akash Dinkar	Navigator, Referral	3	Navigation, Referrals
174544-006	Akash Holkar	Navigator	3	Navigation
174544-004	Elijah Byrdom	Users	0	N/A

4. Click on **[View Client Directory]**.

Add a Client

1. Follow steps one through four of the "Add, Remove, or Reassign a Client" job aid section.
2. To add a client, select **[Add New Client]**.



Client Directory

Search by Name: [] Filter

- Boy Support Team, Shinigami(26)
- Kendrick, Anna(0)
- Rautomation, Acedhadd(48)
- STANLEY, ROGER DP(23)
- Tribbiani, Joey(51)

Add New, Reassign or Remove Clients

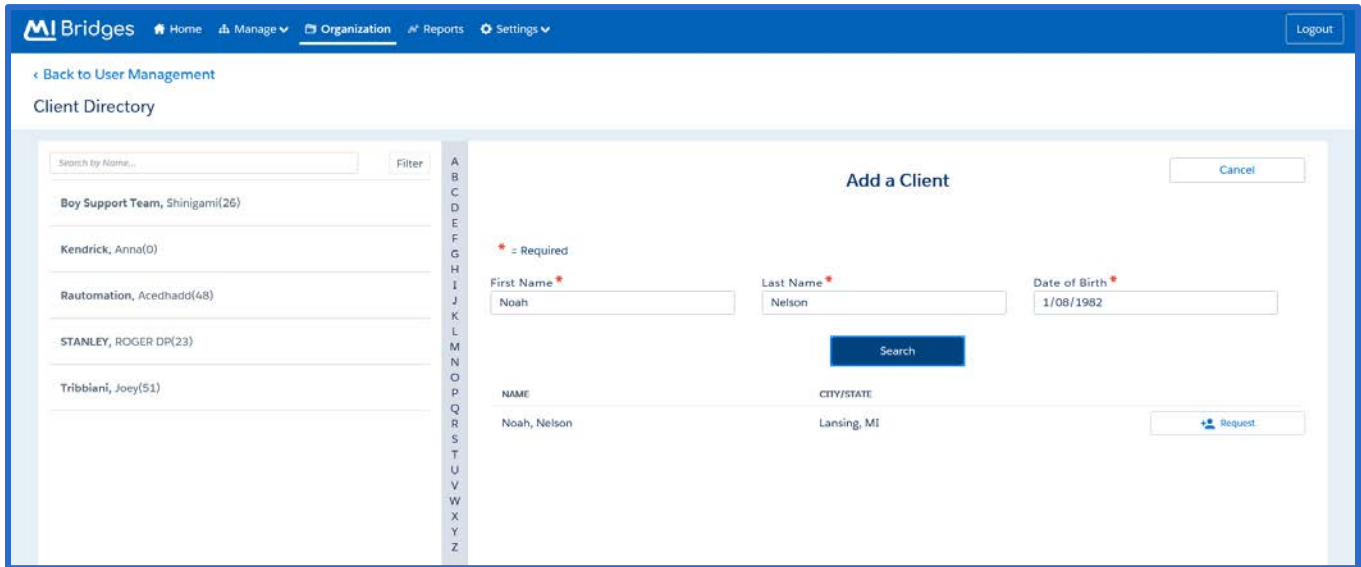
Press the buttons to either add a new client, reassign clients or remove clients.

Add New Client **Reassign Clients**

Remove Clients

3. Type in the client's first name, last name, and birthday.

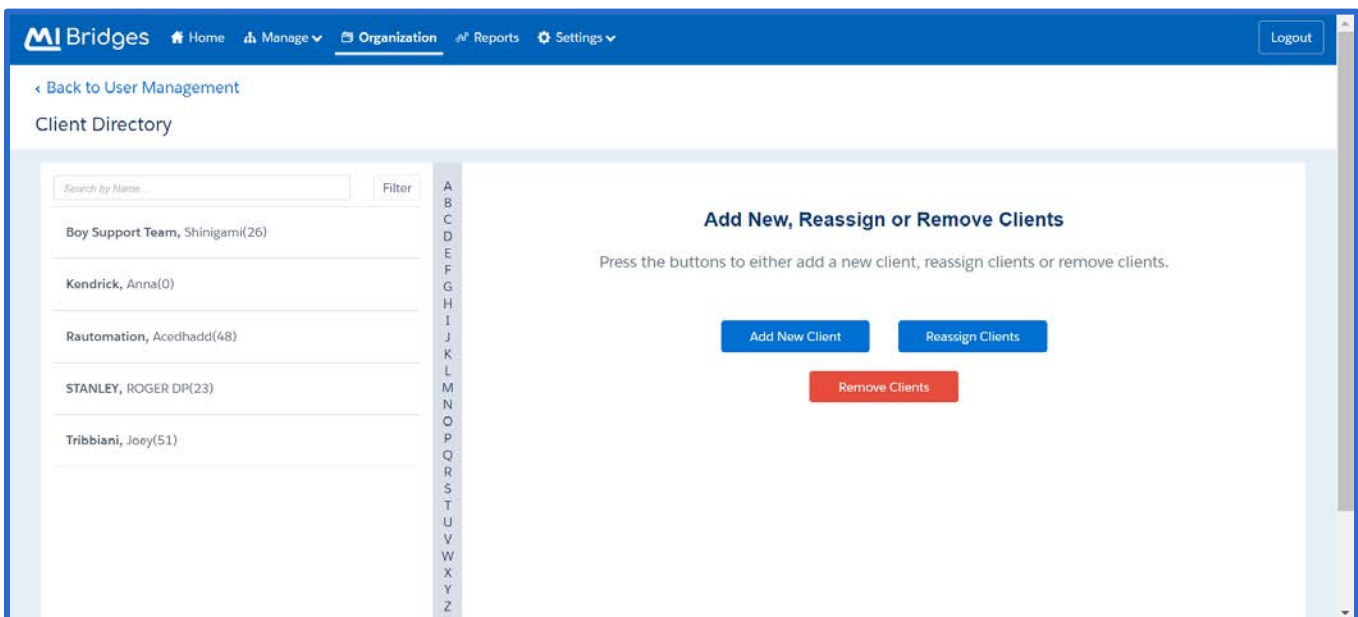
4. Select **[Search]**.



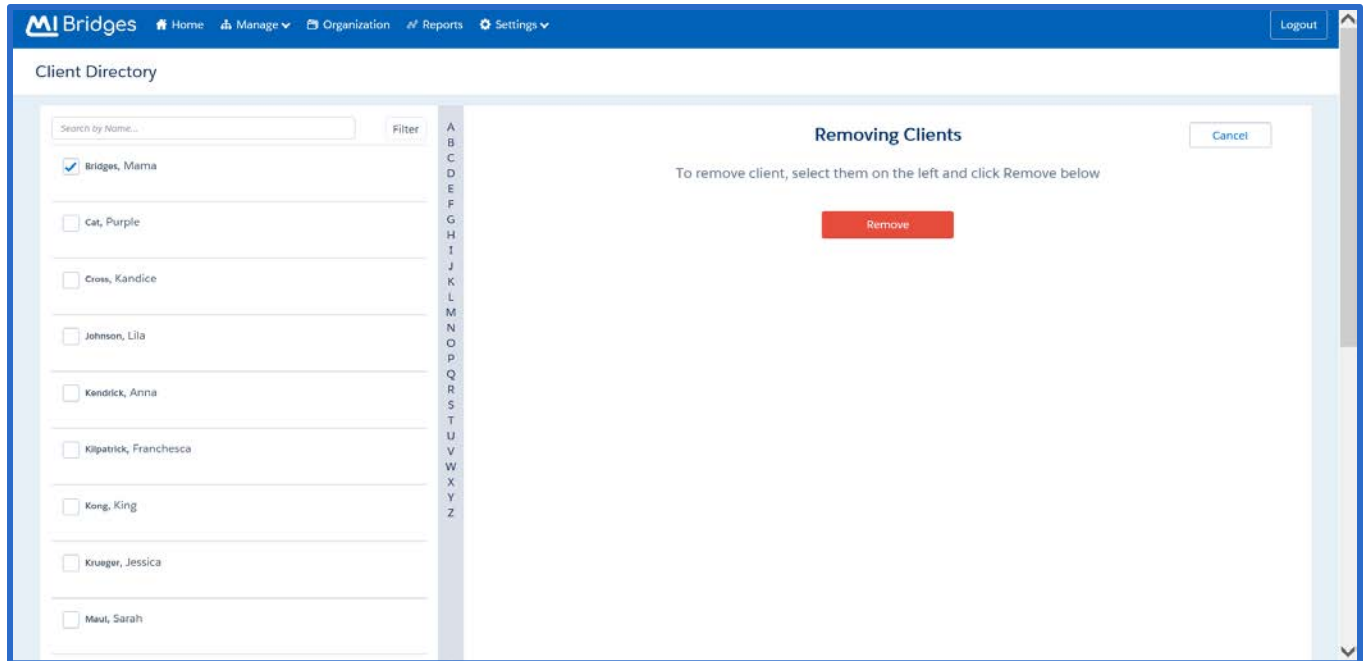
5. Click [ Request]. A request will be sent to add the new client.

Remove Client

1. Follow steps one through four of the "Add, Remove, or Reassign a Client" job aid section.
2. Select **[Remove Client]**.

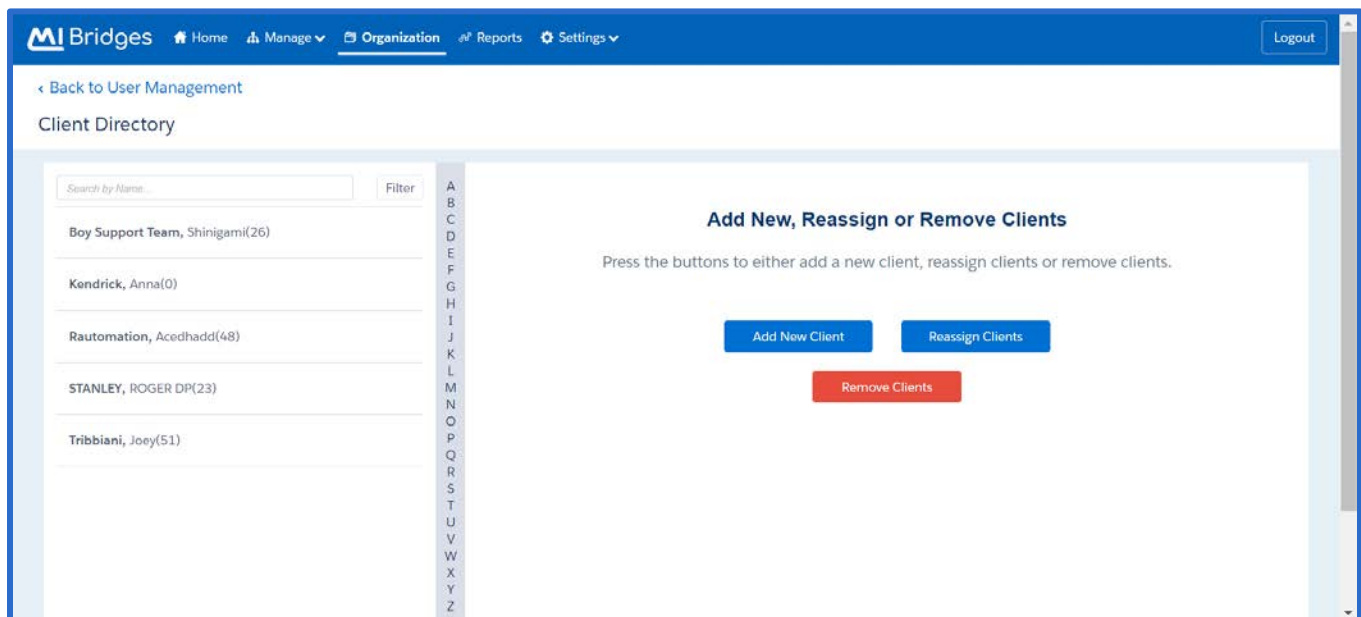


3. Click the **box** next to the client you want to remove.
4. Click **[Remove]**. The client will be deleted from the client directory.

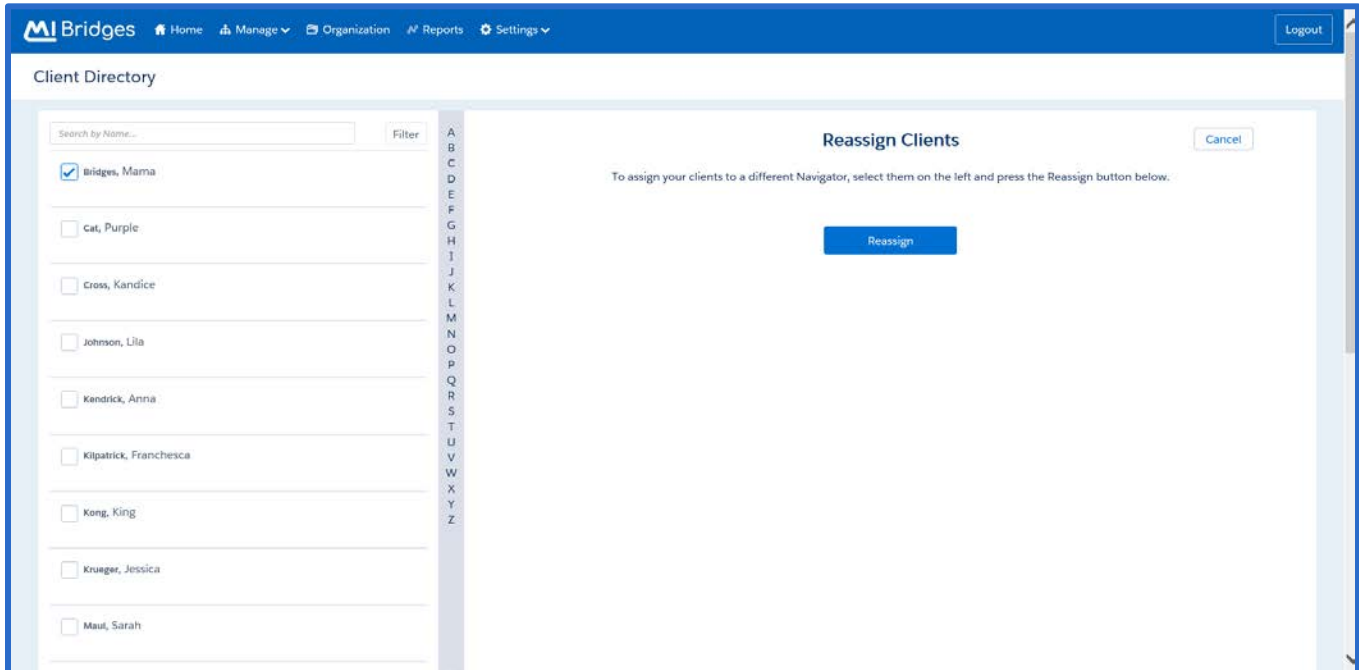


Reassign Client

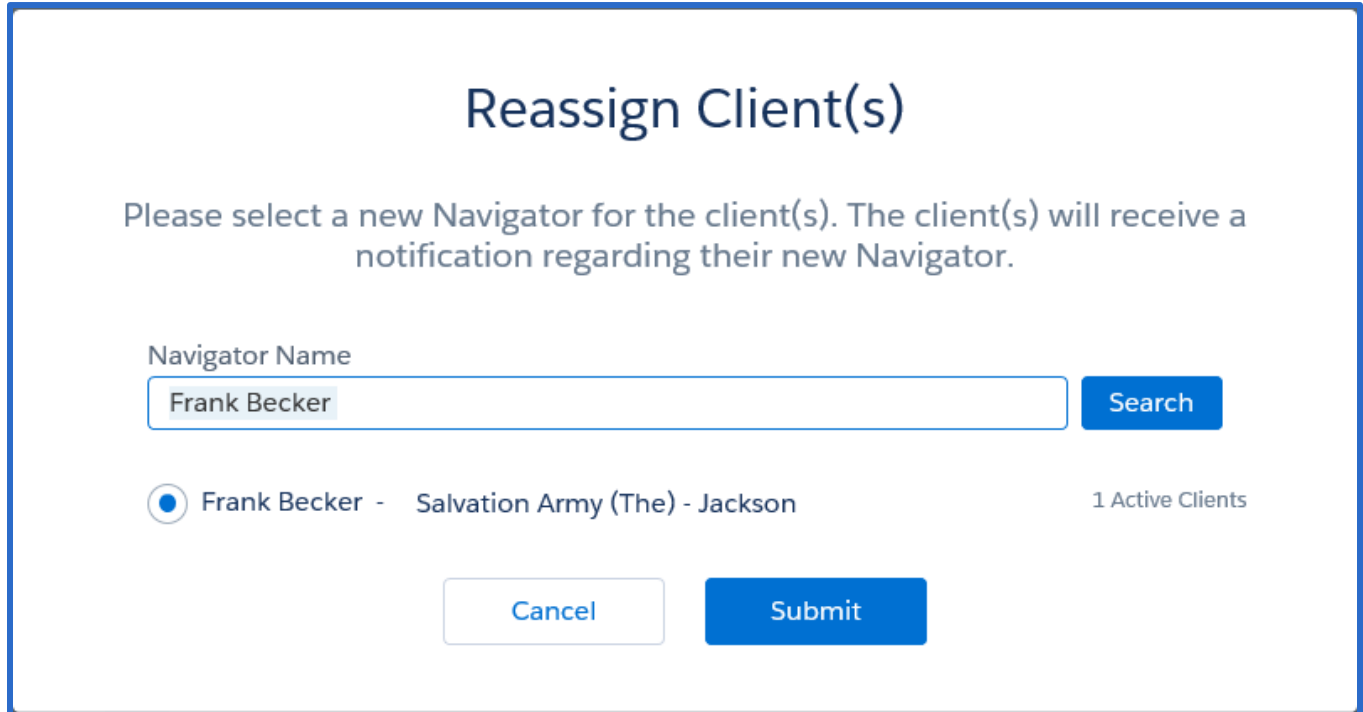
1. Follow steps one through four of the "Add, Remove, or Reassign a Client" job aid section.
2. Select **[Reassign Client]**.



3. Click the **box** next to client you want to reassign.
4. Click **[Reassign]**.




5. Type in the navigator's name you want to reassign the client to and click **[Search]**.
6. Select the correct navigator.



7. Click **[Submit]**. A notification will be sent to the client.

Frequently Asked Questions

	Q. Who in my organization can make these changes
	A. Only navigators that have the "Manage Organization" permission can make these changes. A total of 3 users in your organization can have the "Manage Organization" permission.
	Q. What notifications can I get as a navigator?
	A. If you are a referral organization you can receive a daily email notifying you of any new referrals sent to your organization. If you are a navigator you can receive a notification each time your client is triggered in MI Bridges as having an urgent need.