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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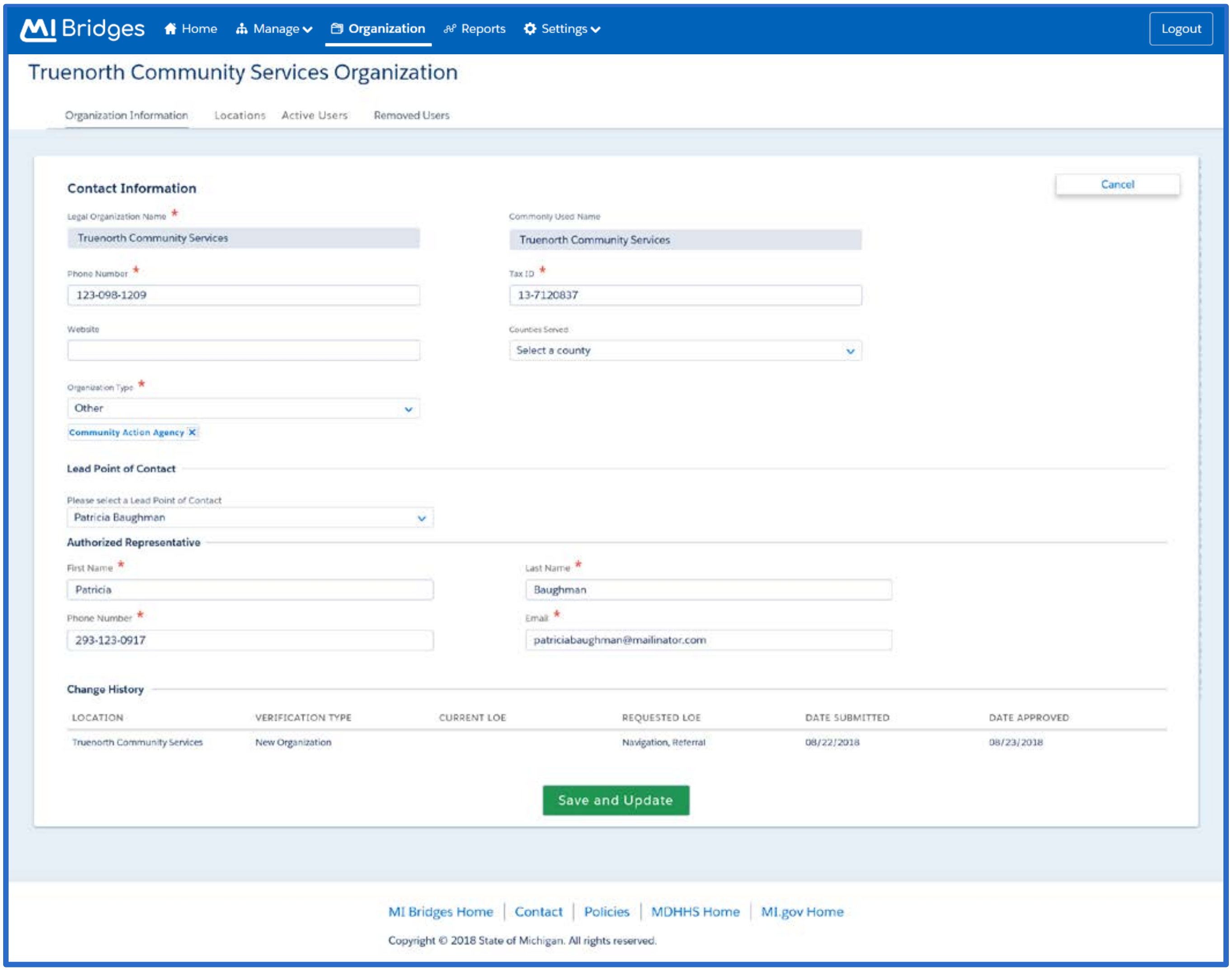
Important Information

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

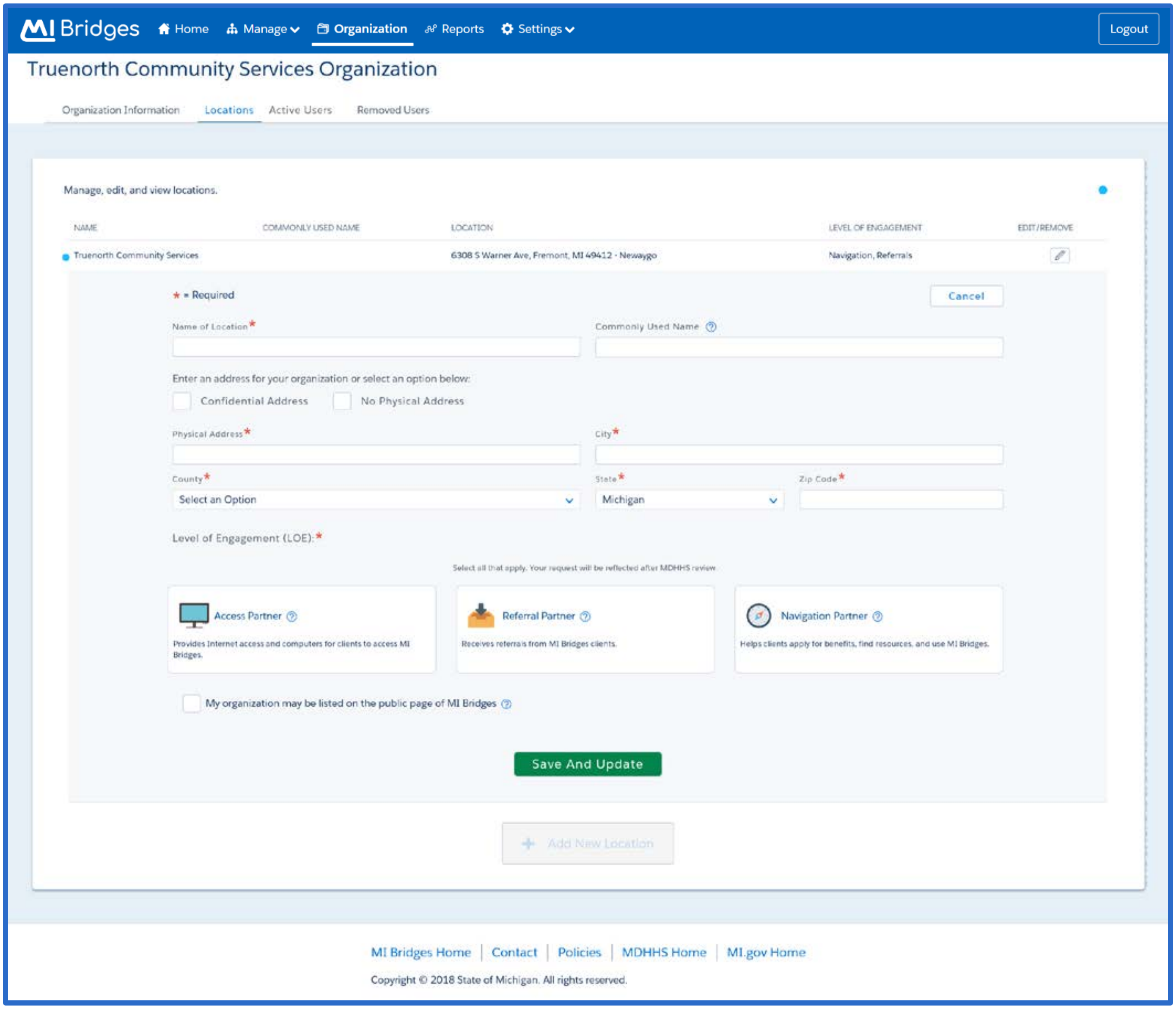
1. From the Navigation Bar, click **[Organization].** The **Manage Organization** page displays.



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

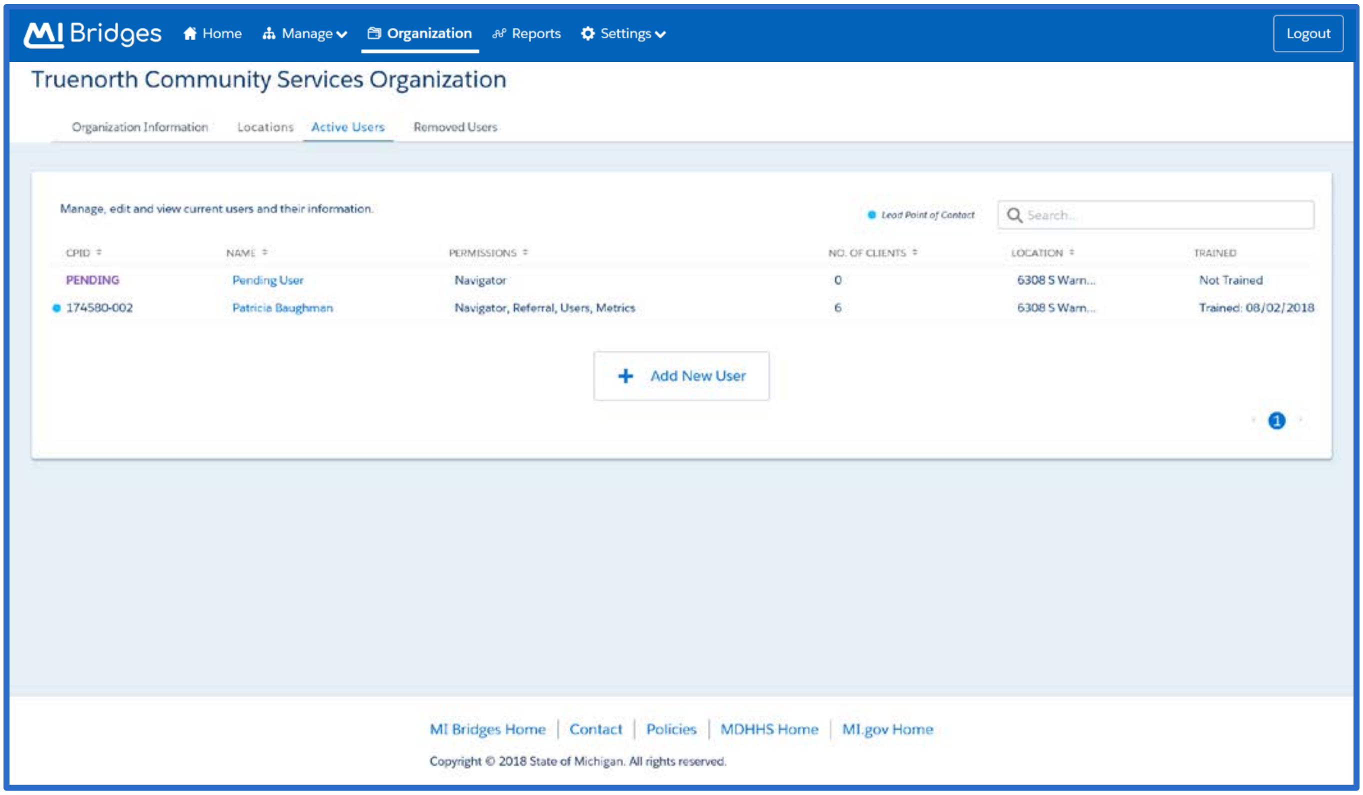
1. Click the **[Locations]** tab. The **[Locations]** page displays.



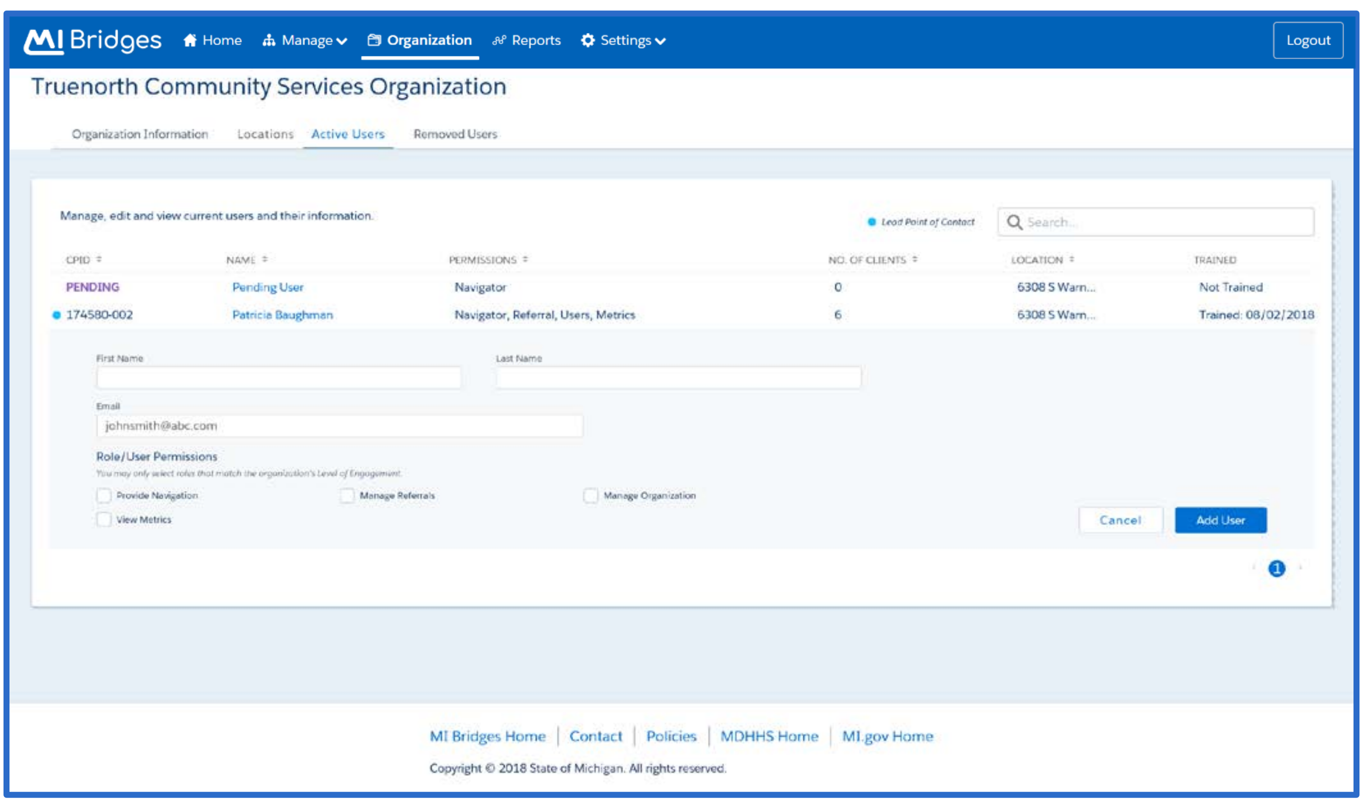
2. Click **[Add New Location].** The **New Organization** fields display.
3. Type a **Name of Location, Physical Address, City, County, State, Zip Code,** and **Level of Engagement.**
4. Click **[Save and Update].** The new location saves.

Active Users

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



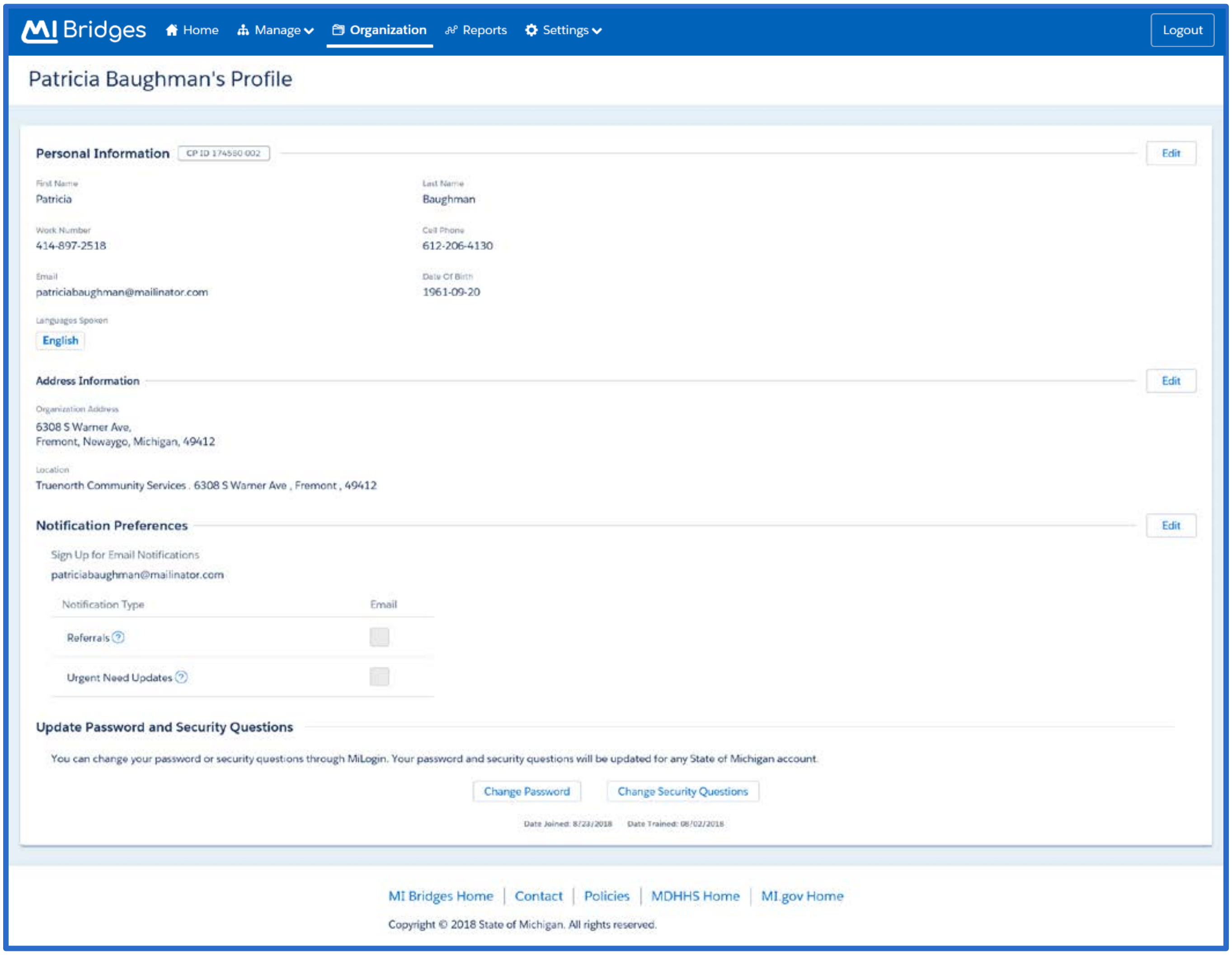
2. Click **[Add New User].** The **New User** fields display.



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

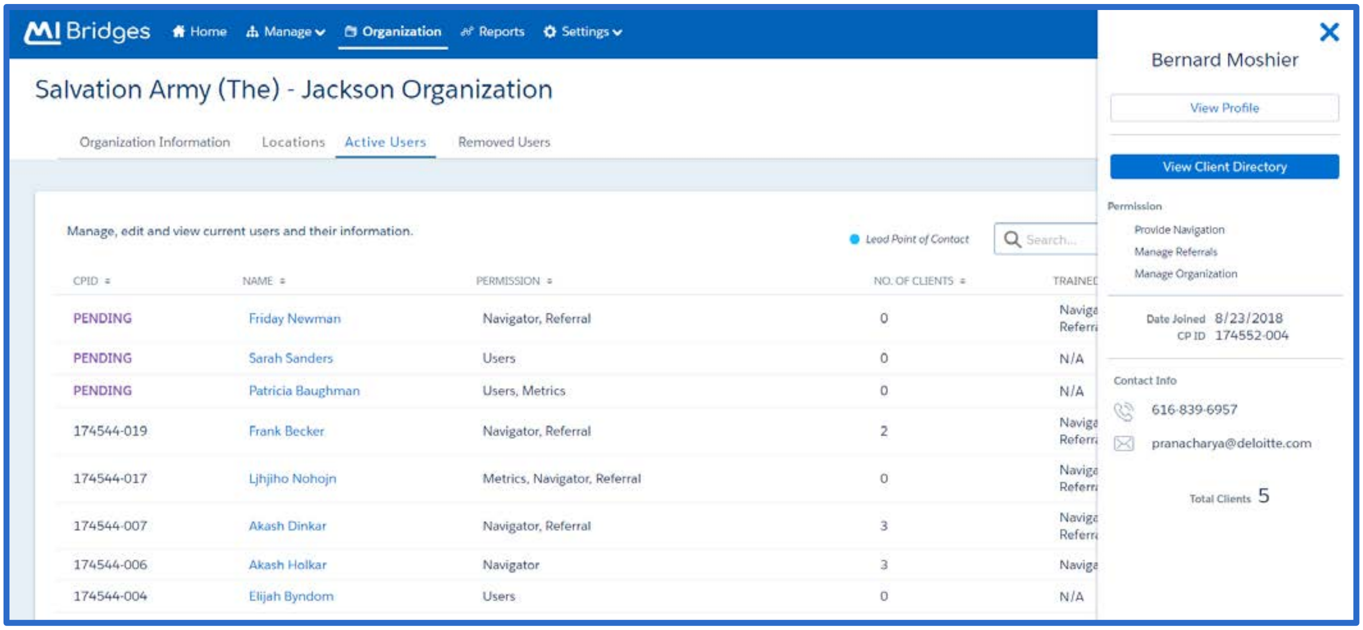
1. From the partner dashboard, click the **Preferences** page displays.



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

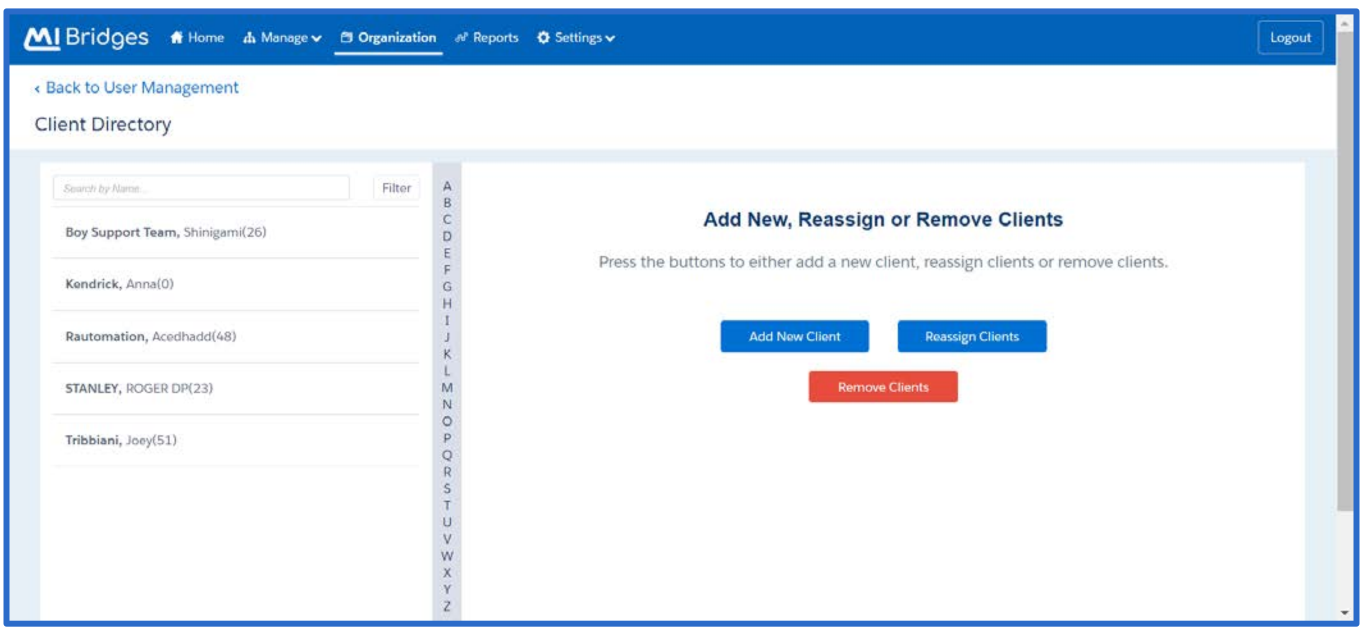
1. From the partner dashboard select **[Organization]**.
2. Select **[Active Users]**.
3. Select the name of a navigator with a CPID.



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

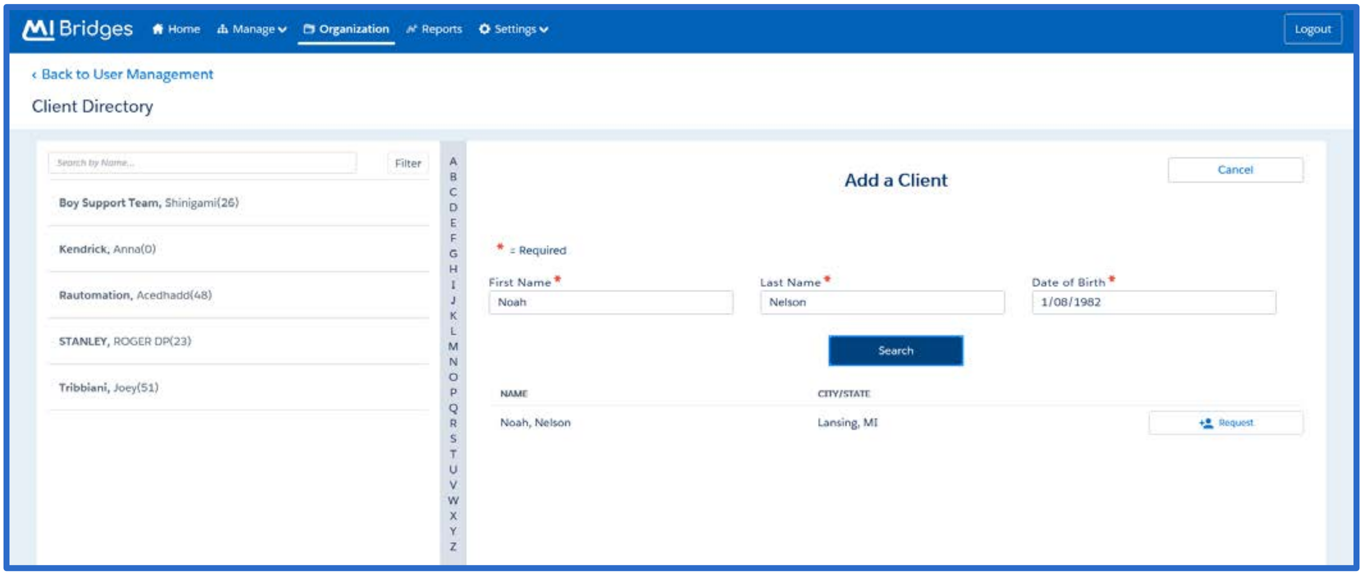
Add a Client

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]**.



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

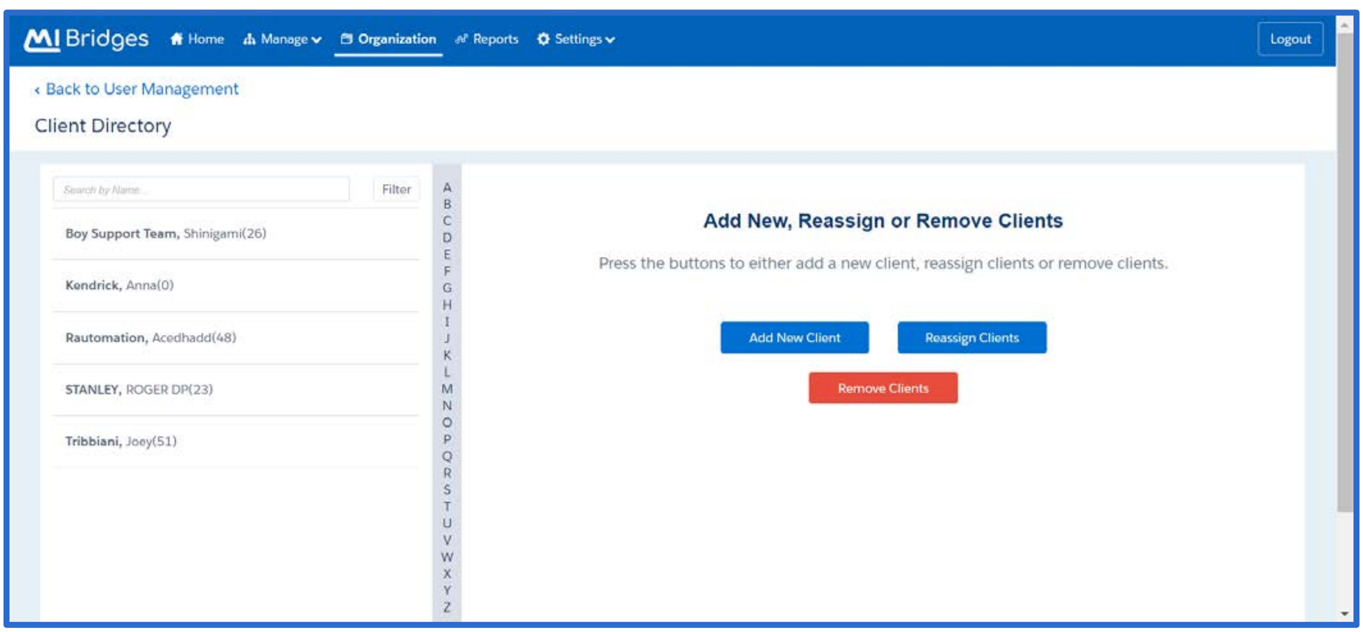
4. Select **[Search]**.



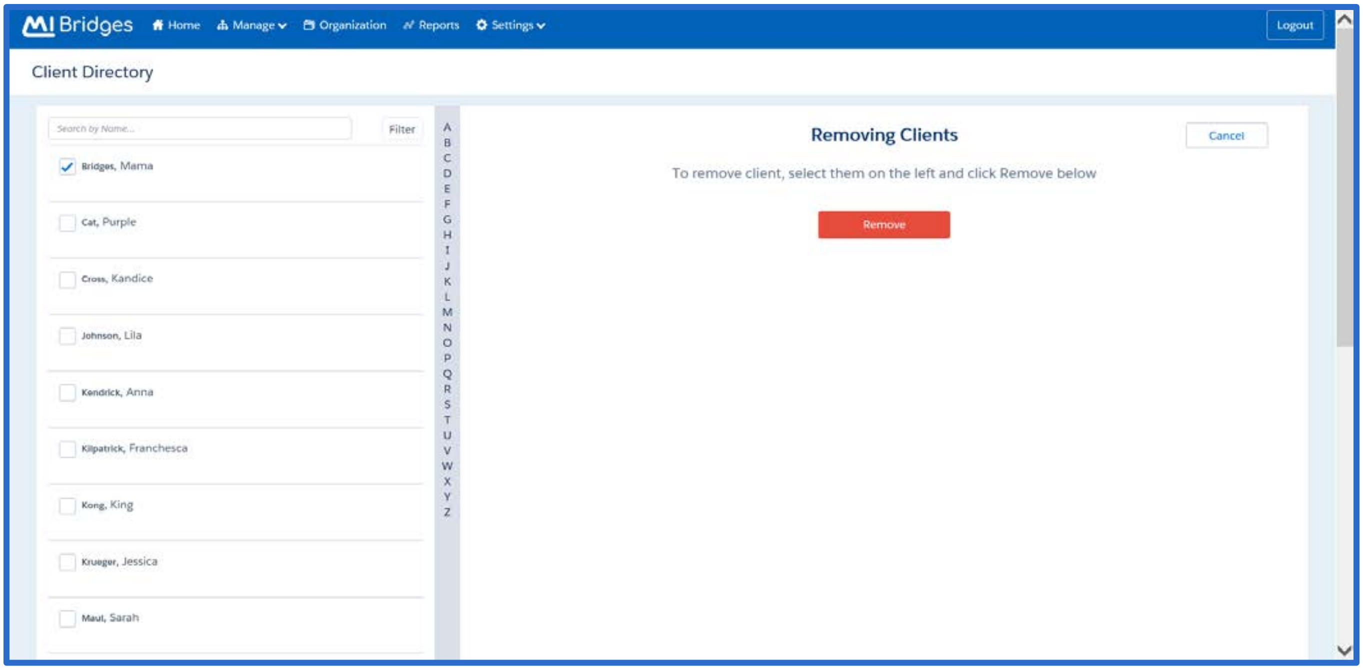
5. Click [Request]. A request will be sent to add the new client.

Remove Client

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

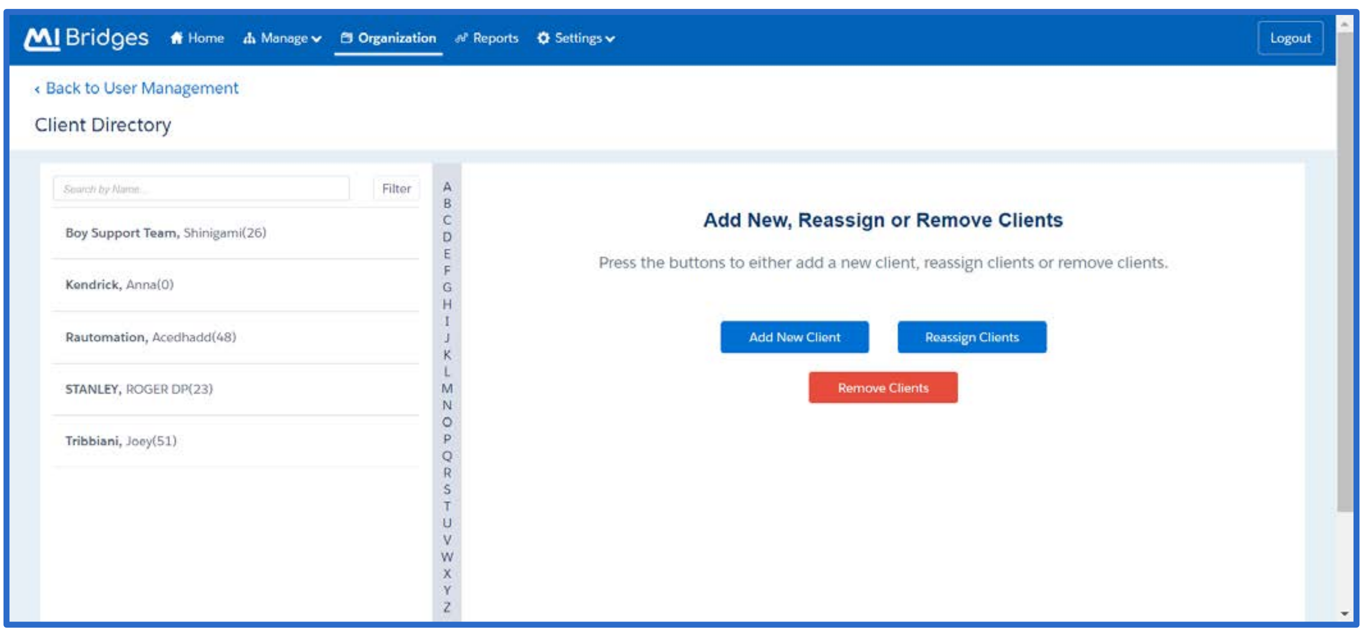


3. Click the **box** next to the client you want to remove.
4. Click **[Remove]**. The client will be deleted from the client directory.

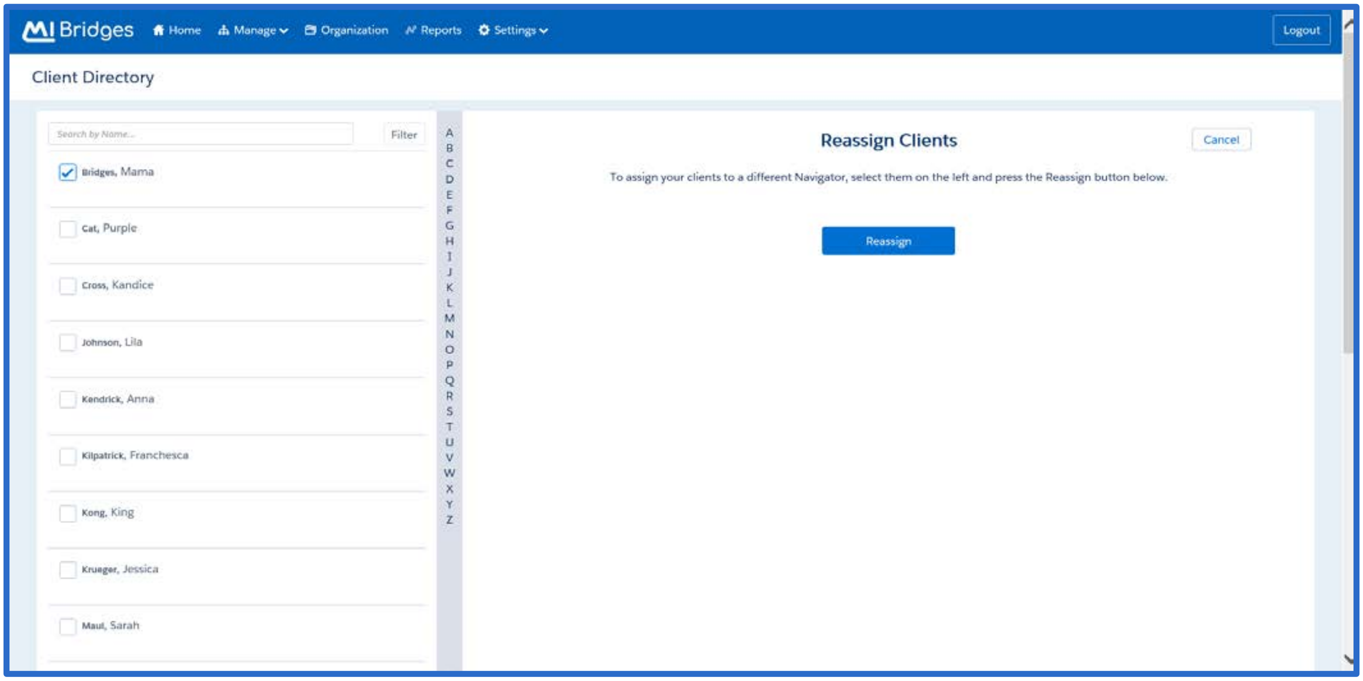


Reassign Client

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.