



# Referral Management

This job aid explains how Referral Partners can manage referrals they receive from clients through MI Bridges.

## Important Information

With MI Bridges there are specific features only available for community partners who have the referral partner level. In order to effectively manage incoming referrals, users will need to have the Assign Referral and Manage Referral permissions. The Manage Referral permission level allows for the referral partner to interact with the referrals received and contact with the client.

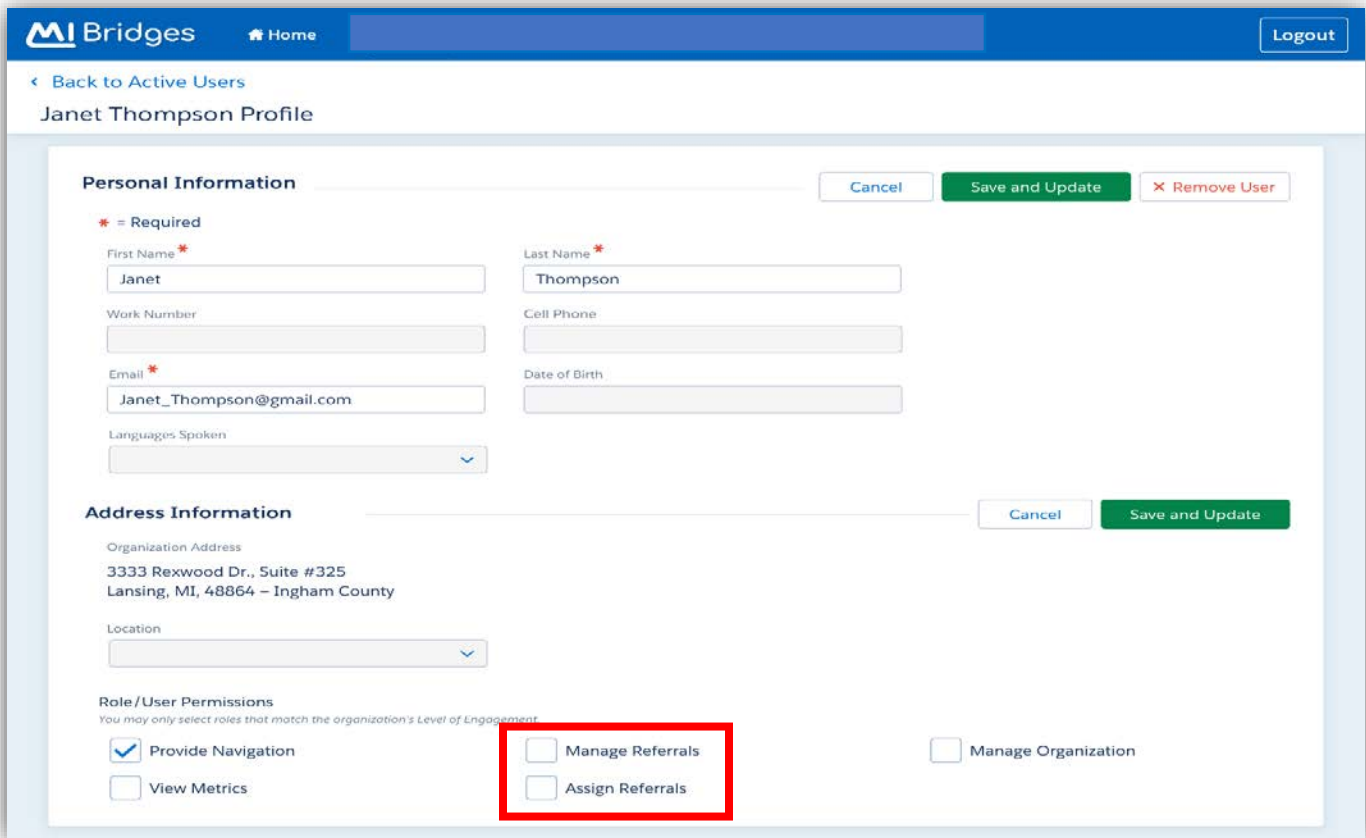
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## Assign Referral Permission

The Lead Point of Contact (LPOC) or users with the *Manage Organization* permission will need to determine which users within their organization should have the *Assign Referral* permissions. A user with Assign Referral permission can view all new unassigned and all currently assigned referrals. To change a user's permission levels, follow these steps:

1. To change an active user's permission level, click the **[Organizations]** tab.
2. Click on the **[Active Users]** tab. Which will bring you to an *Active User* directory. Select a user and at the bottom is the *Role/User Permission* section.



**MI Bridges** Home Logout

Back to Active Users  
Janet Thompson Profile

**Personal Information** Cancel Save and Update Remove User

\* = Required

First Name \* Janet Last Name \* Thompson

Work Number Cell Phone

Email \* Janet\_Thompson@gmail.com Date of Birth

Languages Spoken

**Address Information** Cancel Save and Update

Organization Address  
3333 Rexwood Dr., Suite #325  
Lansing, MI, 48864 – Ingham County

Location

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

Provide Navigation  Manage Referrals  Manage Organization

View Metrics  Assign Referrals

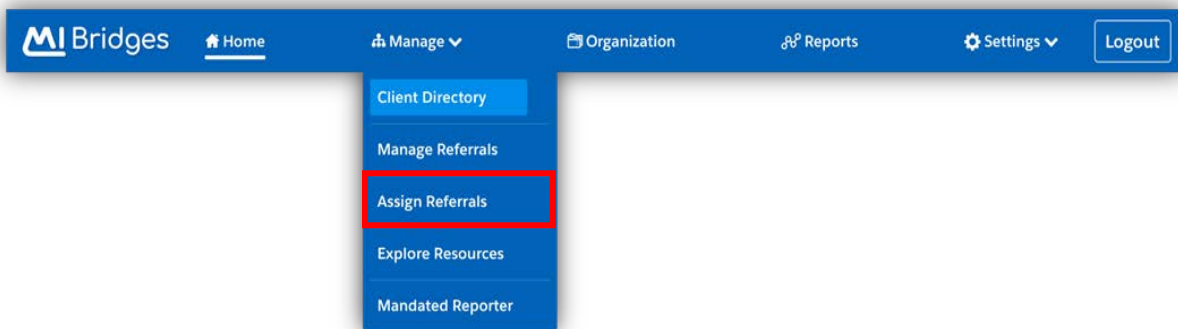


**Tip:** At least one user in your organization needs to have the *Assign Referrals* permission level as this is the only way for new and unassigned referrals to be seen. Often this person is the LPOC. Organizations are not limited to how many users can have this permission level and it might be especially helpful to organizations that have multiple locations to have multiple users with this permission.

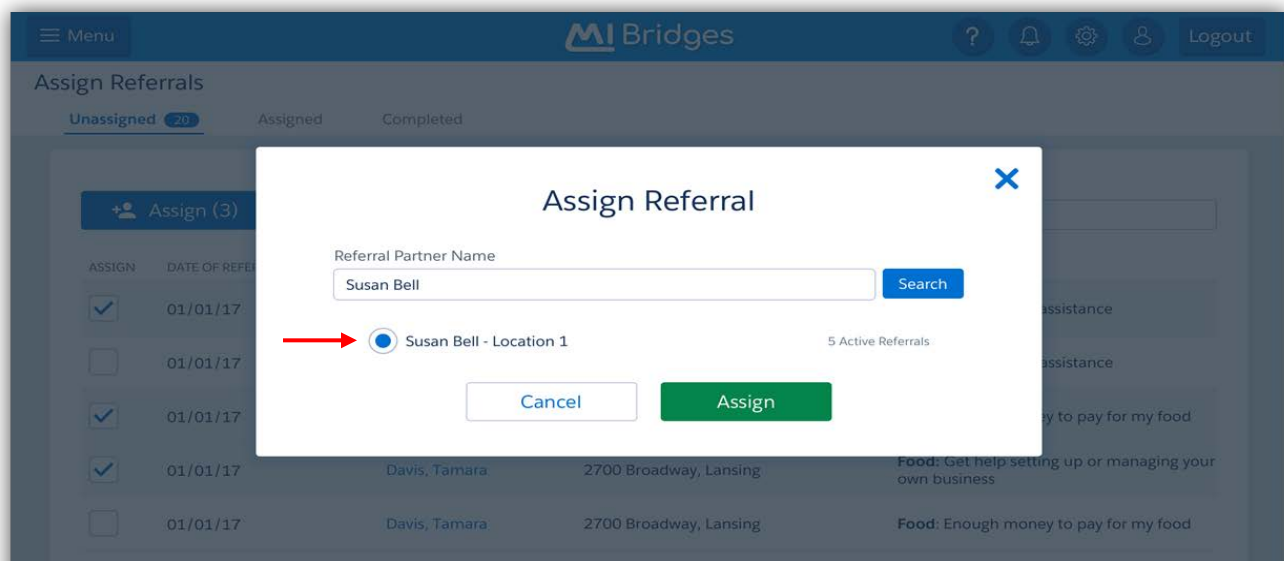
## Assigning an Unassigned Referral

Users with the *Assign Referral* permission can assign referrals to themselves or other authorized users so that action can be taken. Those steps are as follows:

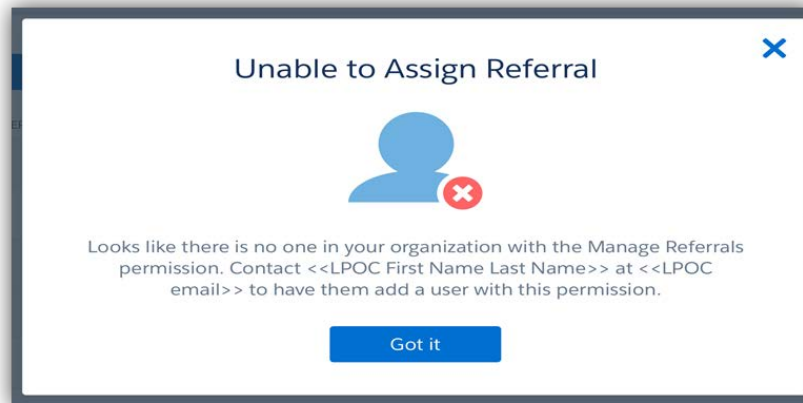
1. To assign an unassigned referral, click on the **[Manage]** tab, and then on the dropdown menu choose **[Assign Referrals]**.



2. In the **[Unassigned]** referral directory on the left-hand side check the box for each referral you wish to assign.
3. Once you have checked the referral(s), click on the **[Assign]** button.
4. A pop-up window will appear with a search box. Enter the name of the user you wish to assign the referral(s) to and click **[Search]**.
5. Select the name that appears and click **[Assign]**.



6. If you try to assign a referral when there are no users within your organization with the *Manage Referrals* permissions, the below pop-up will appear.



**Tip:** The system will not allow you to move between pages without assigning the checked referrals. Only users with Manage Referral permission can be assigned referrals. If you are interested in how to manage your organization please see the [Manage My Organization](#) job aid.

## Referral Review Page

Those with the *Manage Referral* permissions can access a referral review page.

1. By clicking on the **[Manage]** tab and then on **[Manage Referrals]**. The user's referral directory page will display.
2. Click on a referral and it will bring you to its review.



**Note:** This review page includes being able to see who this referral is assigned to, a clickable link to reassign the referral, and a referral history section. Users can suggest resources to clients and guide clients through the Help Me Find Resources survey to better understand their needs.

The screenshot shows the 'MI Bridges' interface for a referral review. The top navigation bar includes 'Home', 'Manage', 'Organization', 'Reports', and 'Settings'. The main content area is titled 'Windy Day' and features a 'Back to Assign Referrals' link and an 'Add to Client Directory' button. The 'Referral Reason' section displays: Referral Date (03/25/2019), Topic (Utilities), Need (Get Help with Energy Self-Sufficiency), Referral Status (In Progress), and Assigned To (Jason Uat) with a 'Reassign Referral' link. The 'Contact Info' section shows: Cell Number (517-582-9892), Home Number, Email (windy@mailinator.com), and Preferred Language. The 'Resources' section lists various categories with counts: Food (25), Housing & Shelter (49), Utilities (29), Healthcare (124), Income & Employment (43), Transportation (10), Clothing & Household Goods (19), Child Care (19), Education (50), and Legal (12). Below the resources is a search bar with the text 'Find and share resources directly with Windy.' and two buttons: 'Explore Resources' and 'Help Me Find Resources'. The 'Referral History' section shows a single entry: 'Assigned to Jason Uat by Anner Uat on 01/24/2020'. The 'Notes' section includes a text area for user input.

## Completing a Referral

When completing a referral, a pop-up window will appear after selecting **[Complete]** in the *Referral Status* dropdown menu. If the user selects **No** to “Were you able to address the need?”, follow-up questions will appear.

1. If the user selects **Yes** to the question “*Did you forward this client to another agency?*” a fillable box will prompt the user to enter an organizations name.
2. If the user selects **Yes** to the question “*Would you like to search for other resources to suggest to the client?*”, when you click the **[Submit]** button the site will automatically search for similar resources, and display a list of available resources the user can suggest to the client.

**Referral Feedback**

Tamara Davis  
Food: Get Help with Finding Healthy Food

Were you able to address the need?  
 Yes  No

Reasoning:

- Full capacity/funding not available
- Didn't meet eligibility criteria
- Unable to reach client
- Client didn't come to appointment
- Client no longer has need
- Services available didn't fit the client's need
- Other (please specify)

Did you forward this client to another agency?  
 Yes  No

Would you like to search for other resources to suggest to the client?  
 Yes  No

## Community Partner Resources

### Questions on MI Bridges and Community Partnership

MI Bridges Community Partner Liaison

[MDHHSCommunityPartners@michigan.gov](mailto:MDHHSCommunityPartners@michigan.gov)

MI Bridges Community Partner Website

[www.Michigan.gov/MIbridgesPartners](http://www.Michigan.gov/MIbridgesPartners)

MI Bridges

[https://newmibridges.michigan.gov/s/isd-prelogin-help?language=en\\_US](https://newmibridges.michigan.gov/s/isd-prelogin-help?language=en_US)

MI Bridges Help Desk

(844) 799-9876