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Overview

This job aid covers how to Assign and Reassign Referrals in MI Bridges.

The Lead Point of Contact (LPOC) or users with the *Manage Organization* permission will determine who in the organization will be granted the *Assign Referral* permission. A user with *Assign Referral* permission can view all new, unassigned, and currently assigned referrals. Users with the *Assign Referral* permission can assign referrals to themselves or other authorized users to act on the referral.

Note: For more information on how an LPOC can change a user's permission level, please view the Manage Organization Job Aid.



Open the Assign Referrals Page

FROM THE ASSIGN REFERRALS TILE

1. Click the **Assign Referral Tile** on the Community Partner Dashboard to open the Assign Referrals page.

Manage & Reports Settings	k.		Logout
Roger Stanley's Dashboard CP ID 183	3277-002		
Sign Up for Email Notifications	I want to		
Receive a daily summary of client actions needed	Keep Up With COVID-19 Benefit Changes	View Client Directory	Add New Client
No Thanks Notifications 10 New	Assign Referrals	Manage Referrals	View Metrics
New Referral(s) to Assign 9 New Referral(s) to Manage 1			
View All Notifications	Explore Re	esources Community Pa Resou	rtner Tools & rces

FROM THE NOTIFICATIONS TILE

1. Click the **New Referral(s) to Assign** hyperlink from the Notifications Section to open the Assign Referrals page.





FROM THE TOP NAVIGATION BAR

1. Click **Manage** from the Top Navigation Bar.



2. Click **Assign Referrals** from the drop-down menu.

M Bridges A Home	🚠 Manage 🔨 🖧 Reports 🔅 Settings 🗸
De ger Stepleule I	Client Directory
Roger Stanley's L	Manage Referrals
	Assign Deferrals
Sign Up for E	Assign Referrais
	Explore Resources
Pocoivo a daily summ	Mandated Reporter
Receive a daily summ	

The Assign Referrals page has four tabs:

- **Unassigned** tab: shows all the client referrals that need to be assigned to a user in your organization with the *Manage Referrals* permission.
- **Needs Review** tab: shows all **New** and **In Progress** referrals that were previously assigned to a referral user who is now deactivated.
- **Assigned** tab: shows all client referrals assigned to you or another referral user with the *Manage Referrals* permission to act on.
- **Completed** tab: shows all client referrals that have been completed by yourself or another referral user in your organization with the *Manage Referrals* permission.



Assigning a Referral

The **Unassigned** tab shows all client referrals that need to be assigned to a user in your organization with the *Manage Referrals* permission. This can be yourself or another team member.

1. From the Unassigned tab, click the **Assign** checkbox(es) next to the client's referral record.

					Filter by Organ	nization Location		Search by Client Name	
+1	Assign (0)	🗎 Exp			Select locatio	n	~	Q Search	
ASSIGN	DATE OF REFERRAL *	NAME ÷	CLIENT COUNTY ÷	ORGANIZATION LOCATION +	REFERRAL SOURCE +	REFERRAL TOPIC \$	REFERR	AL NEED +	EXPORT (SELECT ALL)
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Emplo collect	yment and Training: Currently ing unemployment	
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	FS: Pre Indian Memb	gnant and American /Alaska Native Household er for 28 weeks or more.	
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get He	Ip with Energy Self-Sufficiency	

- **Tip:** You can assign multiple clients at a time by selecting multiple checkboxes.
- 2. Once you have checked the checkbox(es) next to the referrals(s), click the blue Assign button.

				_	Filter by Organ	nization Location		Search by Client Name	2
+2	Assign (2)	🗎 Exp			Select locatio	on	~	Q Search	
ASSIGN	DATE OF REFERRAL ‡	NAME ‡	CLIENT COUNTY \$	ORGANIZATION LOCATION +	REFERRAL SOURCE ÷	REFERRAL TOPIC \$	REFERR	AL NEED \$	EXPORT (SELECT ALL)
~	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Emplo	yment and Training: Currently ting unemployment	
~	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	FS: Pre Indian Memb	egnant and American Alaska Native Household ber for 28 weeks or more.	
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get He	elp with Energy Self-Sufficiency	

Note: The Assign button is conveniently located at the top and the bottom of the tab.

Notice an **Assign Referral** pop-up box appears with a search box. From here, you can:

- Assign a Referral to another Referral Partner.
- Assign a Referral to yourself.

	Who will work	on this r	eferral	?
Staff with Ma	nage Referrals			
Name			Searc	:h
or Assign t	to Self			
	Cancel	Assi	gn	



ASSIGN A REFERRAL TO WHO WILL WORK ON THIS REFERRAL

1. Type a Referral Partner's Name in the **Search** field that has the *Manage Referrals* permission.

	Who will work	on this re	eferral?	×
Staff with Ma	anage Referrals			
Name			Search	
or Assign	to Self			
	Cancel	Assig	'n	
	ip: Remember to a eferral user's first o	lways enter r last name	at least 3 lett to search.	ers of the

2. Click the blue **Search** button.

Staff with Ma	Who will work (on this referral?	×
Chad	0	Search	
or Assign t	o Self		
	Cancel	Assign	

Notice that the Referral Partner name and location appear below with the number of Active Referrals already assigned to the Referral Partner.

Who will work	on this referral?	
Staff with Manage Referrals		
Chad	Search	
or Assign to Self Chads NivensNoIDPQ - 173 Twin Lake	3 Owasippe Rd, 10 Active	Referrals
Cancel	Assign	



3. Select the Name of who will work on this referral.

Who will work	on this ref	erral?
Staff with Manage Referrals		
Chad		Search
or Assign to Self Chads NivensNoIDPQ - 173 Twin Lake	33 Owasippe Rd,	10 Active Referrals
Cancel	Assign	

4. Click the green **Assign** button.

Staff with Manage Referrals Chad Search or Assign to Self Chads NivensNoIDPQ - 1733 Owasippe Rd, 10 Active Referration	Who will work on this	referral?
or Assign to Self Chads NivensNoIDPQ - 1733 Owasippe Rd, 10 Active Referra	taff with Manage Referrals	Search
	r Assign to Self Chads NivensNoIDPQ - 1733 Owasippe R	d, 10 Active Referra



Notice that a green **Notification** now displays in the top right corner showing the referral(s) have been assigned to the Referral User of your choice.

ssig	n Referra	ls				 Assigne 	ed 2 ref	errals to Roger Stanley	×
assign	ed 👍 Need	ds Review 🌘	4 Assigne	d (41) Completed					
9 Forwa	rded Referrals				Filter by Organ	vization Location		Search by Client Name	
	Assign (0)	🗎 Exp		I	Select locatio	on	~	Q Search	
SSIGN	DATE OF REFERRAL =	NAME *	CLIENT COUNTY ?	ORGANIZATION LOCATION =	REFERRAL SOURCE	REFERRAL TOPIC	REFERR	AL NEED ÷	EXPORT (SELECT ALL)
	08/31/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get He	elp with Energy Self-Sufficiency	
	09/05/2023	Stanley, Roger For Self (age 73)	Saginaw	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefi house	ts application submitted with hold member(s) age 60+	
	09/07/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Emplo	yment and Training: Currently ting unemployment	

Important Tip: To see your updates, refresh your page by clicking **Home** on the Top Navigation Bar or right clicking your mouse and selecting **Refresh.**

Note: The referral has been moved from the **Unsassigned** tab to the **Assigned** tab as seen by the numbers next to each tab.

5. Click on the **Assigned** tab to find your newly assigned Referral(s).





6. View the **Assigned To** column to see who is assigned to each referral.

🥑 Forwar	raea Referrais				F	ilter by Organization Lor	cation	Search by	Client Name	
				Referrals		Select location	~	Q Searc	h	
EASSIGN	DATE OF REFERRAL	* NAME *	CLIENT COUNTY	© ORGANIZATION LOCATION ©	REFERRAL SOURCE	REFERRAL TOPIC ÷	REFERRAL NEED		ASSIGNED TO	EXPORT (SELECT ALL)
	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Employment and Tra Currently collecting unemployment	aining:	NivensNoIDPQ, Chads	
	10/26/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Benefits application with household men age 60+	submitted nber(s)	Stanley, Roger	
	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	EHS-HB: Pregnant an American Indian/Ala Household Member weeks or more.	nd aska Native for 28	NivensNoIDPQ, Chads	



ASSIGN A REFERRAL TO YOURSELF

1. Click the Assign to Self hyperlink.

Who will work Staff with Manage Referrals	< on this referral?	×
Name	Search	
or Assign to Self		
Cancel	Assign	

Notice that your name and location appear below with the number of Active Referrals already assigned to you.

V	Vho will work	on this ref	erral?	>
Staff with Mana	ge Referrals			
Name			Search	
or Assign to	Self ger Stanley - 1545 Buch Þids	anan Ave SW, Grand	10 Active Referra	ls
	Cancel	Assign		

2. Click the green **Assign** button.

Who will work on this	x referral?
Staff with Manage Referrals	
Name	Search
or Assign to Self	
Roger Stanley - 1545 Buchanan Ave SW, C Rapids	Grand 10 Active Referrals
Cancel	sign



Notice that a green **Notification** pops up in the top right corner showing that your referral(s) have been assigned to the Referral User of your choice. in the **Unassigned** tab.

ssig	n Referra	ls				Assigned	ed 2 ref	errals to Roger Stanley	×
nassign	ed (4) Need	Is Review	4 Assigne	d 41 Completed					
Forward Forwa Forward Forward Forwa Forward Forward For Forward Forward For	arded Referrals								
	Assign (0)	🔒 Ex			Select locat	ion	~	Q Search	
SSIGN	DATE OF REFERRAL =	NAME *	CLIENT COUNTY #	ORGANIZATION LOCATION ÷	REFERRAL SOURCE	REFERRAL TOPIC #	REFERR	AL NEED ÷	EXPORT (SELECT ALL)
	08/31/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get He	elp with Energy Self-Sufficiency	
	09/05/2023	Stanley, Roger For Self (age 73)	Saginaw	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefi house	ts application submitted with hold member(s) age 60+	
	09/07/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Emplo	yment and Training: Currently ting unemployment	

Important Tip: To see your updates, refresh your page by clicking **Home** on the Top Navigation Bar or right clicking your mouse and selecting **Refresh.**

Note: The referral has been moved from the **Unsassigned Tab** to the **Assigned Tab** as seen by the numbers next to each Tab.

3. Click on the **Assigned Tab** to find your Assigned Referral(s).





4. View the **Assigned To** column to see who is assigned to each referral.

Jnassigne	ed 👩 I	Needs Reviev	4	Assigned (39) Comple	ted					
6 Forward Contract Forward Contract Forward	rded Referrals				T	Filter by Organization Lo	cation	Search by	Client Name	
- 12))		Referrals		Select location	~	Q Searc	:h	
REASSIGN	DATE OF REFERRAL	° NAME °	CLIENT COUNTY	© ORGANIZATION LOCATION ©	REFERRAL SOURCE	REFERRAL TOPIC #	REFERRAL NEED #		ASSIGNED TO ÷	EXPORT (SELECT ALL)
	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Employment and Tra Currently collecting unemployment	aining:	NivensNoIDPQ, Chads	
	10/26/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Benefits application with household men age 60+	submitted nber(s)	Stanley, Roger	
	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	EHS-HB: Pregnant ar American Indian/Ala Household Member weeks or more.	nd aska Native for 28	NivensNoIDPQ, Chads	



Note: This tab shows all referrals from your organization that have been assigned by a Referral Partner with the *Assign Referrals* permission.



Ressigning a Referral

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The **Needs Review Tab** shows all New and In Progress referrals that were previously assigned to a Referral User who is now deactivated.

1. From the Assign Referrals page, click the **Needs Review Tab**.

Assign Refe	Assign Referrals							
Unassigned 6	Needs Review 🔼	Assigned 39	Completed					

2. Click the **Reassign** checkbox(es) next to the client's referral record.

					I	Filter by	Organization Location	n	Search by Client N	lame	
+2				teferrals		Select	location	~	Q Search		
REASSIGN	DATE OF REFERRAL	* NAME *	CLIENT COUNTY		REFERRAL SOUF	RCE ÷	REFERRAL TOPIC ÷	REFERRAL NEED		STATUS ÷	EXPORT (SELECT ALL)
	08/11/2023	Ramirez Diaz, Manuel	Kent	17750 Youth Dr, Leroy	Apply for Ber	nefits	Applicant Self- Referral	Get Help with I Sufficiency	Energy Self-	New	
	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Ber	nefits				New	
	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Ber	nefits				New	

Tip: You can reassign multiple clients at a time by selecting multiple checkboxes.

3. Once you have checked the checkboxes next to the referrals(s), click the blue **Reassign** button.

	lame	Search by Client N	1	y Organization Locatio	Filter b			_		
		Q Search	~	location	Select	eferrals			Reassign (2)	÷ 2
EXPORT (SELECT ALL)	STATUS ≑		REFERRAL NEED	REFERRAL TOPIC ÷	REFERRAL SOURCE ÷		CLIENT COUNTY	¢ NAME ¢	I DATE OF REFERRAL	REASSIGN
	New	Energy Self-	Get Help with Sufficiency	Applicant Self- Referral	Apply for Benefits	17750 Youth Dr, Leroy	Kent	Ramirez Diaz, Manuel	08/11/2023	~
	New				Apply for Benefits	1733 Owasippe Rd, Twin Lake	Kent	Hayek, Antoun	07/28/2023	~
	New				Apply for Benefits	1733 Owasippe Rd, Twin Lake	Kent	Hayek, Antoun	07/28/2023	
	New				Apply for Benefits	Lake 1733 Owasippe Rd, Twin Lake	Kent	Antoun Hayek, Antoun	07/28/2023	

Note: The **Reassign** button is conveniently located at the top and the bottom of the tab.



Notice a **Reassign Referral** pop-up window appears with a search box. From here, you can:

- Reassign a Referral to another Referral Partner.
- Reassign a Referral to yourself.

	Who will work	on this re	ferral?)	K
Staff with Manage Refer	rals				
Name			Search		
or Reassign to Self					
	Cancel	Reassi	gn		

REASSIGN A REFERRAL TO ANOTHER REFERRAL PARTNER

7. Type a Referral Partner's Name in the **Search Field** who has the *Manage Referrals* permission.

	Who will work on this referral?							
Staff with Ma	nage Referrals							
Name			Search					
or Reassig	n to Self							
	Cancel		ssign					

8. Click the blue **Search** button.

	Who will work	on this	referral?	×
Staff with Ma	nage Referrals			•
Chad			Search	
or Reassig	n to Self			
	Cancel	Rea	assign	



Notice that the Referral Partner name and location appear below with the number of Active Referrals already assigned to the Referral Partners.

Who will work on this	referral?
Staff with Manage Referrals	
Chad	Search
or Reassign to Self	d and the form
Twin Lake	a, 10 Active Referral
Cancel	issign

9. Select the Referral Partner's name.

Who will work	on this r	eferral?	×
Staff with Manage Referrals			
Chad		Search	
or Reassign to Self Chads NivensNoIDPQ - 1733 Twin Lake	3 Owasippe Rd,	10 Active Referra	als
Cancel	Reas	sign	

10. Click the green Reassign button.

	Who will work or	n this ref	erral?	×
Staff with Ma	anage Referrals			
Chad			Search	
or Reassig	gn to Self			
	Chads NivensNoIDPQ - 1733 O Twin Lake	wasippe Rd,	10 Active Referra	ls
	Cancel	Reassig	'n	



Notice that a green **Notification** pops up in the top right corner showing that your referral(s) have been reassigned to the Referral User of your choice in the **Needs Review** tab.

Assign Referrals	Reassigned 2 referrals to Roger Stanley X
Unassigned (B) Needs Review (2) Assigned (48) Completed	
● Forwarded Referrals ★ Reassign (0)	Filter by Organization Location Search by Client Name Select location Q Search
REASSIGN DATE OF REFERRAL © NAME © CLIENT COUNTY © ORGANIZATION LOCATION ©	REFERRAL SOURCE * REFERRAL NEED * STATUS * EXPORT
07/28/2023 Hayek, Antoun Kent 1733 Owasippe Rd, Twin Lake	Apply for Benefits New
07/28/2023 Hayek, Antoun Kent 1733 Owasippe Rd, Twin Lake	Apply for Benefits New
Important Tip: To see your updates, refr Navigation Bar or right clicking your mou	esh your page by clicking Home on the Top use and selecting Refresh.
Note: The referral has been moved from by the numbers next to each tab.	the Needs Review tab to the Assigned tab as seen
1. Click on the Assigned Tab to find your newly Ass	signed Referral(s).
Assign Referrals	

Unassigned 🚺

Needs Review 4

4 Assigned 39

Completed



12. View the **Assigned To** column to see who is assigned to each referral.

orwai	rded Referrals									
		_			F	Filter by Organization Loo	ation	Search by	Client Name	
				leferrals		Select location	×	Q Searc	h	
SIGN	DATE OF REFERRAL	* NAME *	CLIENT	* ORGANIZATION LOCATION *	REFERRAL SOURCE	REFERRAL TOPIC ÷	REFERRAL NEED #		ASSIGNED TO C	EXPORT (SELECT ALI
	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Employment and Tra Currently collecting unemployment	iining:	NivensNoIDPQ, Chads	
	10/26/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Benefits application with household mer age 60+	submitted nber(s)	Stanley, Roger	
	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	EHS-HB: Pregnant ar American Indian/Ala Household Member weeks or more	nd aska Native for 28	NivensNoIDPQ, Chads	

Referral Partner with the Assign Referrals permission.



REASSIGN A REFERRAL TO YOURSELF

1. Click the **Reassign to Self** hyperlink.

Who will work o	on this referral?	×
Staff with Manage Referrals Name	Search	
or Reassign to Self		-
Cancel	Reassign	

Notice that your name and location appear below with the number of Active Referrals already assigned to you.

Who will work on this	referral?	×
Staff with Manage Referrals Name	Search	
or Reassign to Self		
Roger Stanley - 1545 Buchanan Ave SW, G Rapids	Grand 10 Active Referrals	
Cancel	assign	

5. Click the green **Reassign** button.

Who will work on this	referral?
taff with Manage Referrals	
Name	Search
r Reassign to Self Roger Stanley - 1545 Buchanan Ave SW, G Rapids	rand 10 Active Referra
Cancel	assign



Notice that a green **Notification** pops up in the top right corner showing that your referral(s) have been reassigned to the Referral User of your choice in the **Needs Review** tab.

						 Reassigned 	2 referrals to Roger Stanley	×
ssigned 8	Needs I	Review 2	Assigned	41 Completed				
Forwarded Re	eferrals							
	sign (0)	Ex			Filter by Organization Loc	ation	Search by Client Name	
ASSIGN DATE	OF REFERRAL ÷	NAME ÷	CLIENT COUNTY =	ORGANIZATION LOCATION ÷	REFERRAL SOURCE =	REFERRAL TOPIC ÷	REFERRAL NEED * STATUS *	EXPORT (SELECT ALL)
07/2	28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits		New	
07/2	28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits		New	

Note: The referral has been moved from the **Needs Review** tab to the **Assigned** tab as seen by the numbers next to each tab.

6. Click on the Assigned tab to find your newly assigned Referral(s).

Assign Re	eferrals		
Unassigned 6	Needs Review 4	Assigned 39	Completed



7. View the **Assigned To** column to see who is assigned to each referral.

Unassigne	d 4	Needs Revi	ew 3	Assigned 39	Comp	oleted			
Forwarded Referrals + Reassign (0)			Export Referrals		Filter by Organization Location		Search by Client Name		
REASSIGN	DATE OF REFERRAL		CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE		REFERRAL NEED ÷	ASSIGNED TO ≑	EXPORT (SELECT ALL)
	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Employment and Training: Currentl collecting unemployment	i ^{ly} Stanley, Roger	
	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	EHS-HB: Pregnan and American Indian/Alaska Native Household Member for 28 weeks or more.	t d ^{Stanley, Roger}	

Note: This tab shows all referrals from your organization that have been assigned by a Referral Partner with the *Assign Referrals* permission.

Export Referrals

Note: You can **Export Referrals** from any of the tabs available in the Assign Referrals Page.

1. Click the **Export Check Box(es)** next to each referral record from the tab.

Forwa	arded Referrals				Filter by C	Organization Location	Search by Client Name	2
	+ Assign (0)				Select lo	cation	♥ Q. Search	
SIGN	DATE OF REFERRAL	≎ NAME ≎	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE		REFERRAL NEED ÷	EXPORT (SELECT ALL)
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Get Help with Energy Self- Sufficiency	
	09/07/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Employment and Training: Currently collecting unemployment	
	09/05/2023	Stanley, Roger For Self (age 73)	Saginaw	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self- Referral	Benefits application submitted with household member(s) age 60+	

Tip: You can Export all Files by clicking the Export (Select All) checkbox.

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2. Once you have checked all the referrals(s) you would like to export, click the green **Export Referrals** button.

	Assign (0)	sign (0) 🖹 Export Referrals			Filter by Organ	nization Location	Search by Client Name	
SSIGN	DATE OF REFERRAL ÷	NAME ÷	CLIENT COUNTY ÷	ORGANIZATION LOCATION ÷	REFERRAL SOURCE ÷	REFERRAL TOPIC ÷	REFERRAL NEED ÷	EXPORT (SELECT ALL)
	09/08/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	~
	09/07/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	~
	09/05/2023	Stanley, Roger For Self (age 73)	Saginaw	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	
	08/31/2023	Chamb James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	

Notice an Assigned Referrals Table downloads to your computer with all referrals selected.

🔤 ISD Assign Referrals - Work - Mi	crosoft Edge				$\overline{1}$
Ô				Downloads	□
Assign Ref	errals	Assigned_Referrals_Table_2023_12_4.csv Open file			
THE DAY DOWNER				See more	
Unassigned 4	Needs Review 3	Assigned 39	Completed		

Click **Open File** to open the file on to your computer.



Notice all referrals are organized by columns seen in the Assign Referrals page.

Auto	Save 💽 🖪 🏷 -	୯ଁ୫ି• ≏	Assigned_Referrals	_Table_2023 ~	✓ Search				œ - ○ >
File	Home Insert	Draw Page L	ayout Formulas	Data Revie	w View Help				Comments 🛛 🖻 Share
M1	M1 - i × ✓ fr								
	A	В	С	D	E	F	G	Н	1
	Date of	Name	Over Age 80?	Client	Organization	Referral	Referral	Referral Need	Assigned To
1	Referral	Hume	over Age oor	County	Location	Source	Topic	helenanteeu	Abbighted To
	0/0/2022	Chambers	N	Kent	1733 Owasippe	Apply for	Applicant Self-	Get Help with Energy	
2	9/8/2023	, James	INO	Kent	Rd, Twin Lake	Benefits	Referral	Self-Sufficiency	
								Employment and	
	9/7/2023	Chambers	No	Kont	1733 Owasippe	Apply for	Applicant Self-	Training: Currently	
	5/1/2025	, James	NU	Nefft	Rd, Twin Lake	Benefits	Referral	collecting	
3								unemployment	