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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.

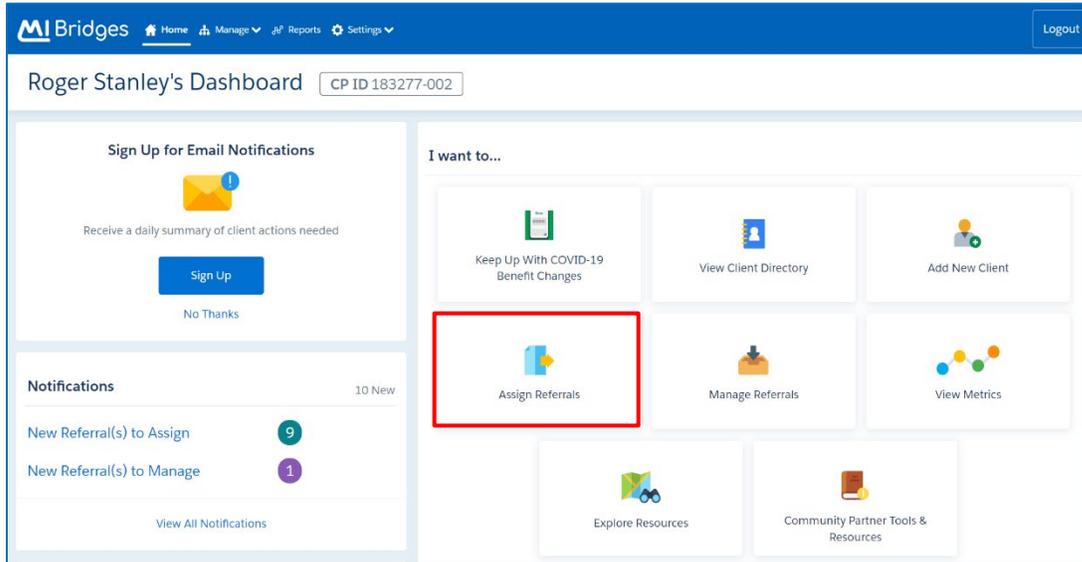


**Note:** For more information on how an LPOC can change a user’s permission level, please view the [Manage Organization Job Aid](#).

## Open the Assign Referrals Page

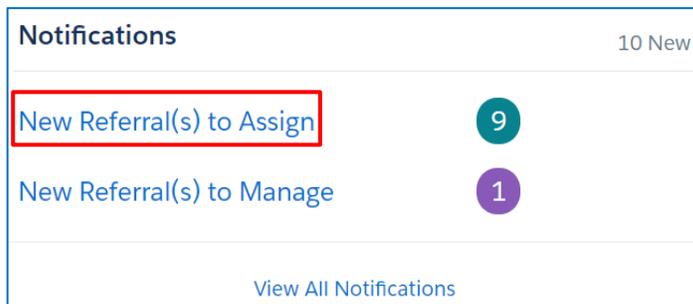
### FROM THE ASSIGN REFERRALS TILE

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



### FROM THE NOTIFICATIONS TILE

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

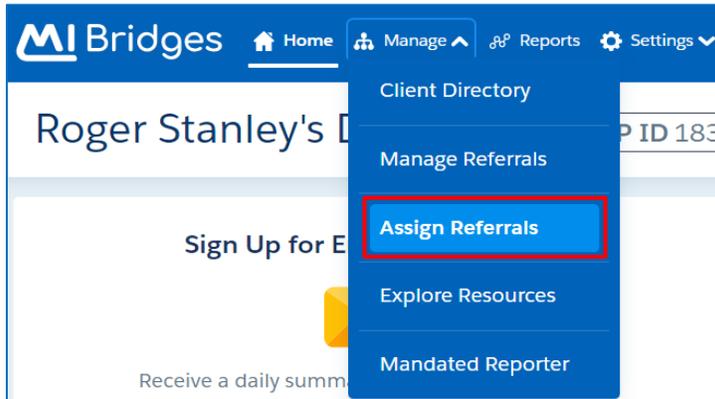


## FROM THE TOP NAVIGATION BAR

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



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



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.

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

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	<input type="checkbox"/>
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	FS: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	<input type="checkbox"/>
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>

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

- Once you have checked the checkbox(es) next to the referral(s), click the blue **Assign** button.

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input checked="" type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	<input type="checkbox"/>
<input checked="" type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	FS: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	<input type="checkbox"/>
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>

**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 referral?

Staff with Manage Referrals

or [Assign to Self](#)

## 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 referral?

Staff with Manage Referrals

Name...

or [Assign to Self](#)

 **Tip:** Remember to always enter at least 3 letters of the referral user's first or last name to search.

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

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Assign to Self](#)

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

or [Assign to Self](#)

Chads NivensNoIDPQ - 1733 Owasippe Rd,  
Twin Lake 10 Active Referrals

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

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Assign to Self](#)

 Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 10 Active Referrals

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

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Assign to Self](#)

 Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 10 Active Referrals

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.

## Assign Referrals

✔ Assigned 2 referrals to Roger Stanley ✕

**Unassigned** 4
Needs Review 4
**Assigned** 41
Completed

🔔 Forwarded Referrals

+ Assign (0)
📄 Export Referrals

Filter by Organization Location

Select location ▾

Search by Client Name

🔍 Search...

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input type="checkbox"/>	08/31/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>
<input type="checkbox"/>	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+	<input type="checkbox"/>
<input type="checkbox"/>	09/07/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training; Currently collecting unemployment	<input type="checkbox"/>

**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 **Unassigned** 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).

## Assign Referrals

**Unassigned** 6
Needs Review 4
**Assigned** 39
Completed

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

Unassigned **6** Needs Review **4** **Assigned 39** Completed

Forwarded Referrals

Reassign (0) Export Referrals

Filter by Organization Location: Select location [v] Search by Client Name: Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	ASSIGNED TO	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	NivensNoIDPQ, Chads	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel <small>For Self (age 83)</small>	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Stanley, Roger	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	NivensNoIDPQ, Chads	<input type="checkbox"/>

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

## ASSIGN A REFERRAL TO YOURSELF

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

Who will work on this referral?

Staff with Manage Referrals

Name...

or **Assign to Self**

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...

or **Assign to Self**

Roger Stanley - 1545 Buchanan Ave SW, Grand Rapids 10 Active Referrals

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

Who will work on this referral?

Staff with Manage Referrals

Name...

or **Assign to Self**

Roger Stanley - 1545 Buchanan Ave SW, Grand Rapids 10 Active Referrals

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.

## Assign Referrals

✔ Assigned 2 referrals to Roger Stanley ✕

**Unassigned** 4
Needs Review 4
Assigned 41
Completed

🔔 Forwarded Referrals

+ Assign (0)
📄 Export Referrals

Filter by Organization Location

Search by Client Name

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input type="checkbox"/>	08/31/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>
<input type="checkbox"/>	09/05/2023	Stanley, Roger <small>For Self (age 73)</small>	Saginaw	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	<input type="checkbox"/>
<input type="checkbox"/>	09/07/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training; Currently collecting unemployment	<input type="checkbox"/>

**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 **Unassigned 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).

## Assign Referrals

**Unassigned** 6
Needs Review 4
**Assigned** 39
Completed

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

Unassigned 6 Needs Review 4 **Assigned 39** Completed

Forwarded Referrals

Reassign (0) Export Referrals

Filter by Organization Location: Select location

Search by Client Name: Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	ASSIGNED TO	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	NivensNoIDPQ, Chads	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel <small>For Self (age 83)</small>	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Stanley, Roger	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	NivensNoIDPQ, Chads	<input type="checkbox"/>

**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

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

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

### Assign Referrals

Unassigned 6
**Needs Review 4**
Assigned 39
Completed

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

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	08/11/2023	Ramirez Diaz, Manuel	Kent	17750 Youth Dr, Leroy	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	New	<input type="checkbox"/>
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>

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

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

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input checked="" type="checkbox"/>	08/11/2023	Ramirez Diaz, Manuel	Kent	17750 Youth Dr, Leroy	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	New	<input type="checkbox"/>
<input checked="" type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>

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 referral?

Staff with Manage Referrals

Name...

or [Reassign to Self](#)

### 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 Manage Referrals

Name...

or [Reassign to Self](#)

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

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Reassign to Self](#)

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

or [Reassign to Self](#)

Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 10 Active Referrals

9. Select the Referral Partner's name.

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Reassign to Self](#)

Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 10 Active Referrals

10. Click the green **Reassign** button.

Who will work on this referral?

Staff with Manage Referrals

Chad

or [Reassign to Self](#)

Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 10 Active Referrals

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 ✕

Unassigned **8**
Needs Review **2**
Assigned **48**
Completed

**Forwarded Referrals**

+ Reassign (0)
Export Referrals

Filter by Organization Location

Select location ▼

Search by Client Name

Q Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>

**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 **Needs Review** tab to the **Assigned** tab as seen by the numbers next to each tab.

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

## Assign Referrals

Unassigned **6**
Needs Review **4**
Assigned **39**
Completed

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

Unassigned 6 Needs Review 4 **Assigned 39** Completed

Forwarded Referrals

Reassign (0) Export Referrals

Filter by Organization Location: Select location

Search by Client Name: Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	ASSIGNED TO	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	NivensNoIDPQ, Chads	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel <small>For Self (age 83)</small>	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Stanley, Roger	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	NivensNoIDPQ, Chads	<input type="checkbox"/>

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

## REASSIGN A REFERRAL TO YOURSELF

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

Who will work on this referral?

Staff with Manage Referrals

Name...

or [Reassign to Self](#)

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...

or [Reassign to Self](#)

Roger Stanley - 1545 Buchanan Ave SW, Grand Rapids 10 Active Referrals

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

Who will work on this referral?

Staff with Manage Referrals

Name...

or [Reassign to Self](#)

Roger Stanley - 1545 Buchanan Ave SW, Grand Rapids 10 Active Referrals

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 ✕

Unassigned **8**
Needs Review **2**
Assigned **41**
Completed

🔔 Forwarded Referrals

+ Reassign (0)
📄 Export Referrals

Filter by Organization Location

Select location ▼

Search by Client Name

🔍 Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>
<input type="checkbox"/>	07/28/2023	Hayek, Antoun	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits			New	<input type="checkbox"/>

**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 **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 Referrals

Unassigned **6**
Needs Review **4**
Assigned **39**
Completed

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

Unassigned 4 Needs Review 3 **Assigned 39** Completed

Forwarded Referrals

Reassign (0) Export Referrals

Filter by Organization Location: Select location Search by Client Name: Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	ASSIGNED TO	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	Stanley, Roger	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	Stanley, Roger	<input type="checkbox"/>

**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.

Unassigned 4 Needs Review 3 Assigned 39 Completed

Forwarded Referrals

Assign (0) Export Referrals

Filter by Organization Location: Select location Search by Client Name: Search...

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>
<input type="checkbox"/>	09/07/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	<input type="checkbox"/>
<input type="checkbox"/>	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+	<input type="checkbox"/>

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

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

ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
<input type="checkbox"/>	09/08/2023	Chamb... James	Kent	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/07/2023	Chamb... James	Kent	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/05/2023	Stanley, Roger For Self (age 73)	Saginaw	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	<input type="checkbox"/>
<input type="checkbox"/>	08/31/2023	Chamb... James	Kent	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	<input type="checkbox"/>

**Note:** There is an **Export** button is conveniently located at the top and the bottom of the tab.

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

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

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

	Date of Referral	Name	Over Age 80?	Client County	Organization Location	Referral Source	Referral Topic	Referral Need	Assigned To
1	9/8/2023	Chambers, James	No	Kent	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	
2	9/7/2023	Chambers, James	No	Kent	1733 Owasisippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	
3									