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Overview

This job aid covers how to **Reassign**, **Forward**, and **Close** Referrals in MI Bridges.

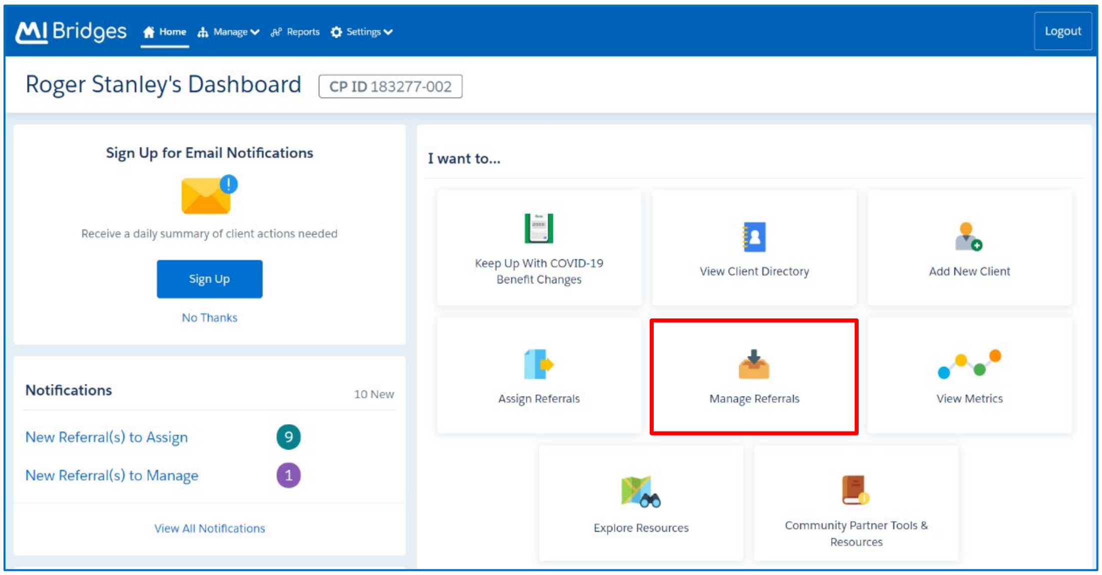
The Lead Point of Contact (LPOC) or users with the *Manage Organization* permission will determine who in the organization will be granted the *Manage Referrals* permission. A user with *Manage Referrals* permission can view all the new, in progress, completed, and forwarded referrals. Users with the *Manage Referral* permission can act on referrals to completion, reassign referrals to another user in their organization, or forward referrals to another organization.

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

Open the Manage Referrals Page

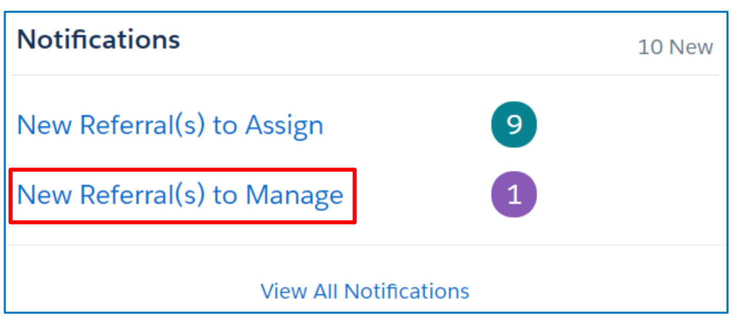
FROM THE MANAGE REFERRALS TILE

1. Click the **Manage Referrals** tile on the Community Partner Dashboard to open the Manage Referrals page.



FROM THE NOTIFICATIONS TILE

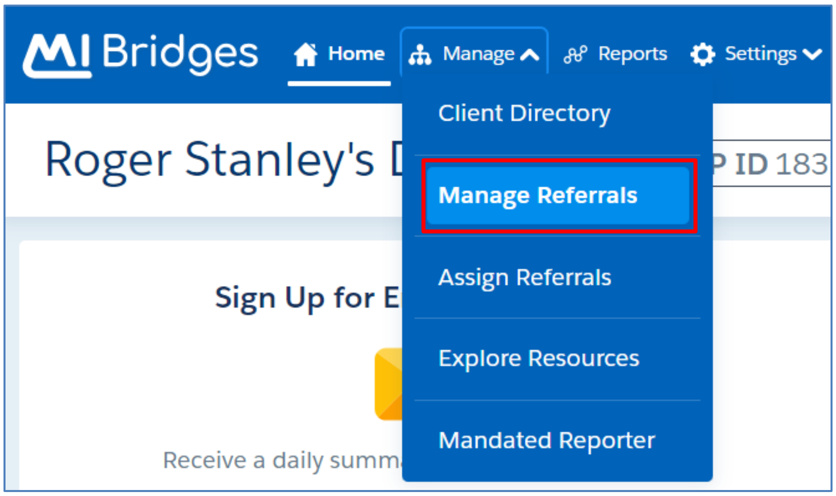
1. Click the **New Referral(s) to Manage** hyperlink from the Notifications Section to open the Manage Referrals page.



FROM THE TOP NAVIGATION BAR

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

2. Click **Manage Referrals** from the dropdown menu.



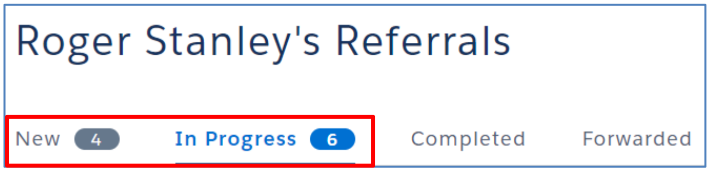
The Manage Referrals Page has four tabs:

- **New** tab: Shows all client referrals that are in a **New** status and assigned to you.
- **In Progress** tab: Shows all client referrals that are in the **In Progress** status and assigned to you.
- **Completed** tab: Shows all client referrals that have been completed by yourself.
    - If the user also has the *Assigned Referrals* permission, you can see completed referrals by yourself and other referral users in your organization with the *Manage Referrals* permission.
- **Forwarded** tab: Shows all client referrals that have been **Forwarded** by yourself or another referral user to a different organization.
    - If the user also has the *Assigned Referrals* permission, you can see forwarded referrals by yourself and other referral users in your organization with the *Manage Referrals* permission.

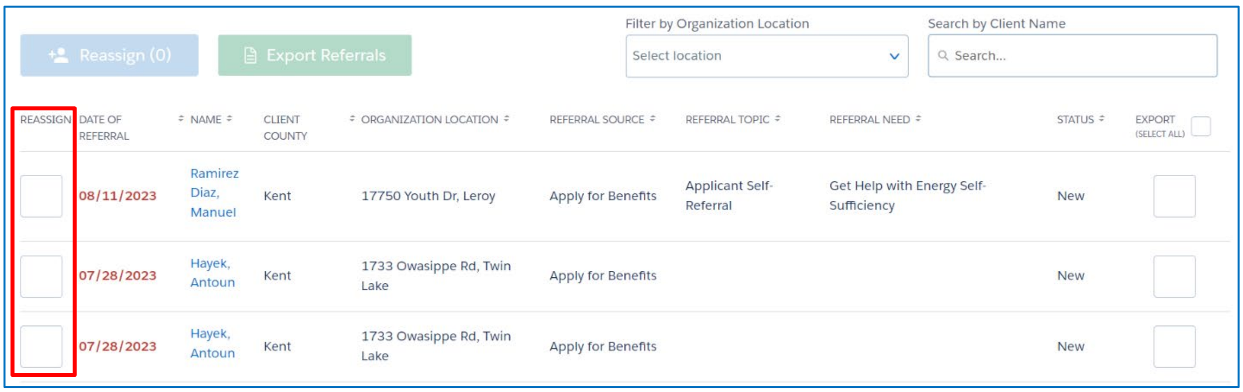
Ressigning a Referral

You can Reassign a referral from the **New** and **In Progress** tab.

1. From the Manage Referrals page, click the **New** or **In Progress** tab.

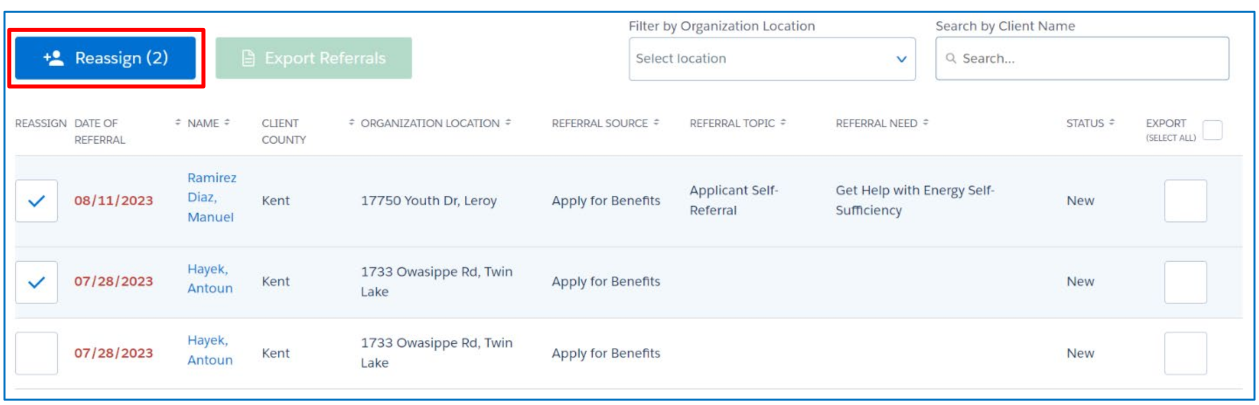


2. Click the **Reassign** checkbox(es) next to the client's referral record.



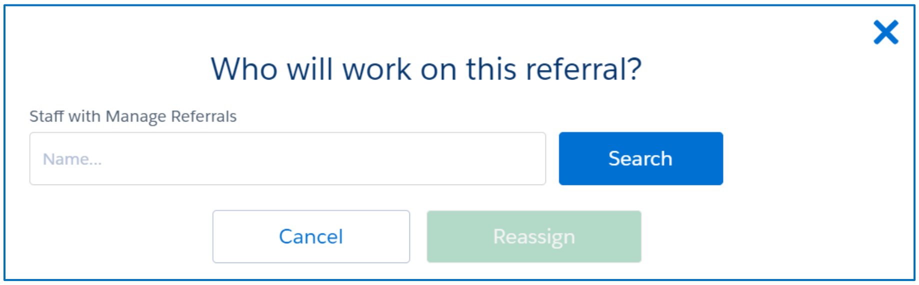
Tip: You can also reassign multiple clients at a time by selecting multiple checkboxes.

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

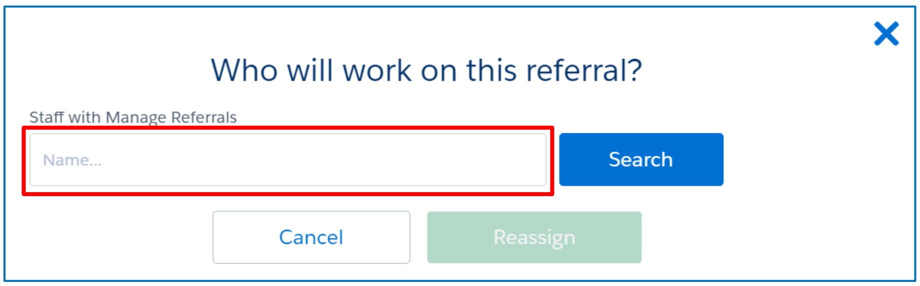


Note: The **Reassign** button is conveniently located at the top and the bottom of the tab.

Notice a **Reassign Referral** pop-up window appears with a search box. From here, you can Reassign a Referral to another Referral Partner in your organization.

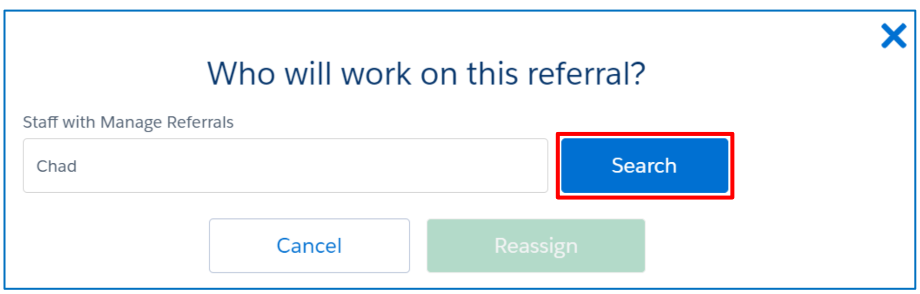


4. Type a Referral Partner's Name in the **Search** field that has the *Manage Referrals* permission.

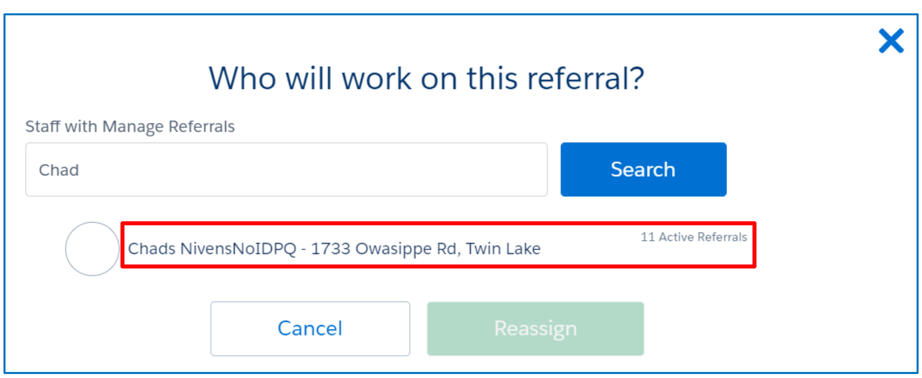


Tip: Remember to always enter at least 3 letters of the referral user's first or last name to search.

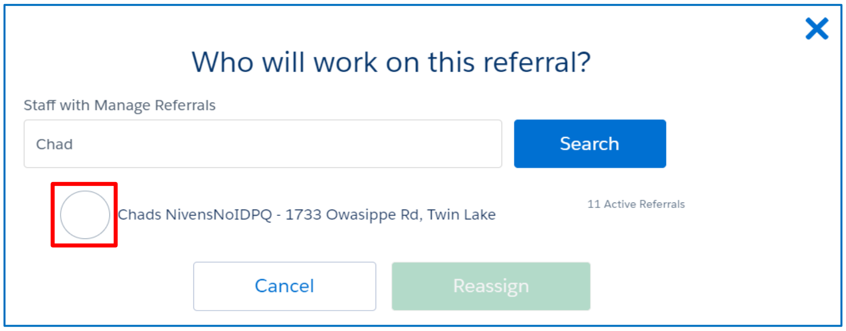
5. Click the blue **Search** button.



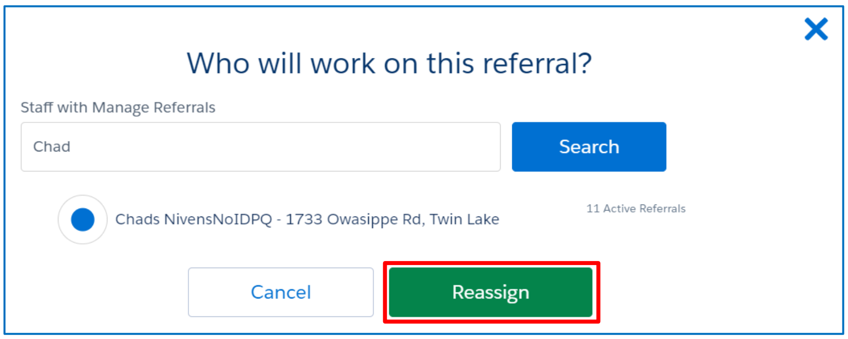
Notice that the Referral Partner name and location appear below with the number of Active Referrals already assigned to the Referral Partner.



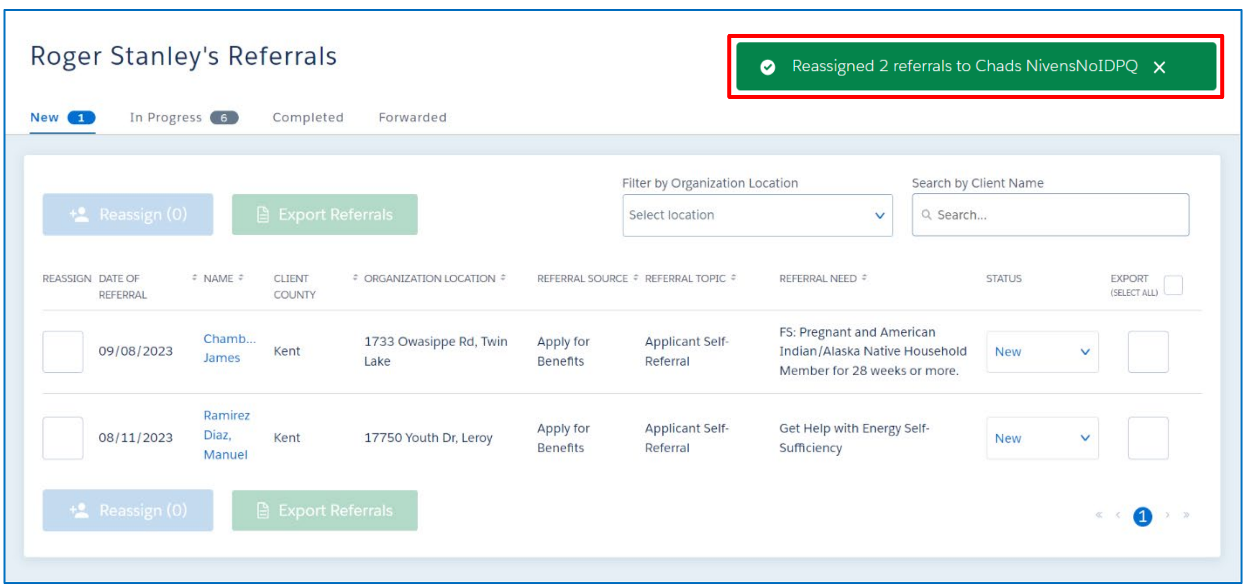
6. Select the **Name of who will work on this referral**.



7. Click the green **Reassign** button.



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



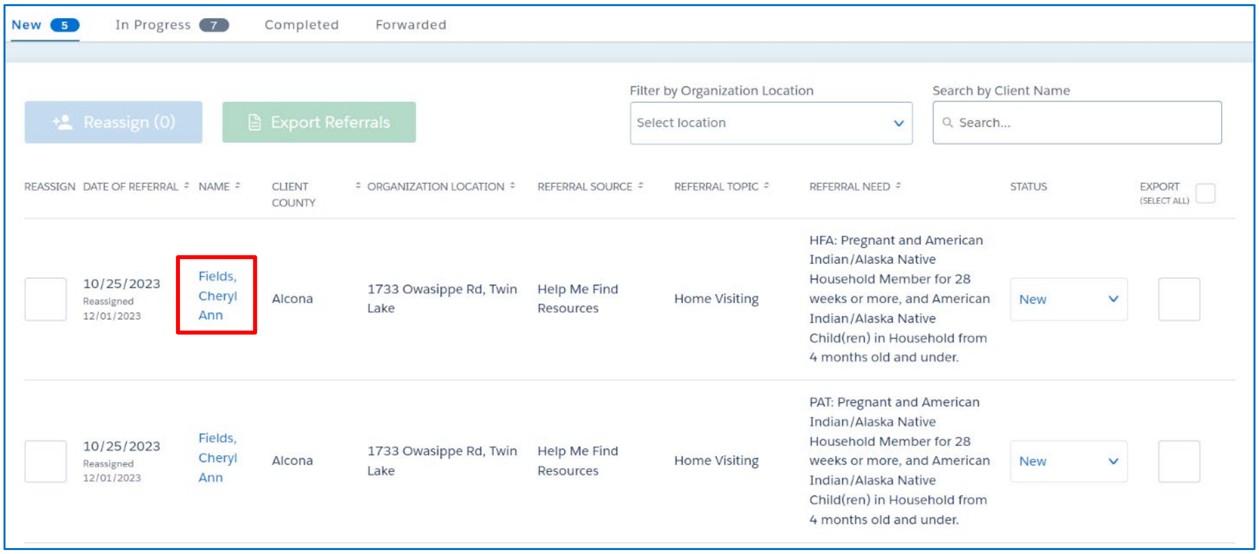
Important Tip: To see your updates, refresh your page by clicking **Home** on the Top Navigation Bar or right clicking your mouse and selecting **Refresh.**

Note: The referral has been moved from the tab you are on and is reflected by the number decrease next to the tab name.

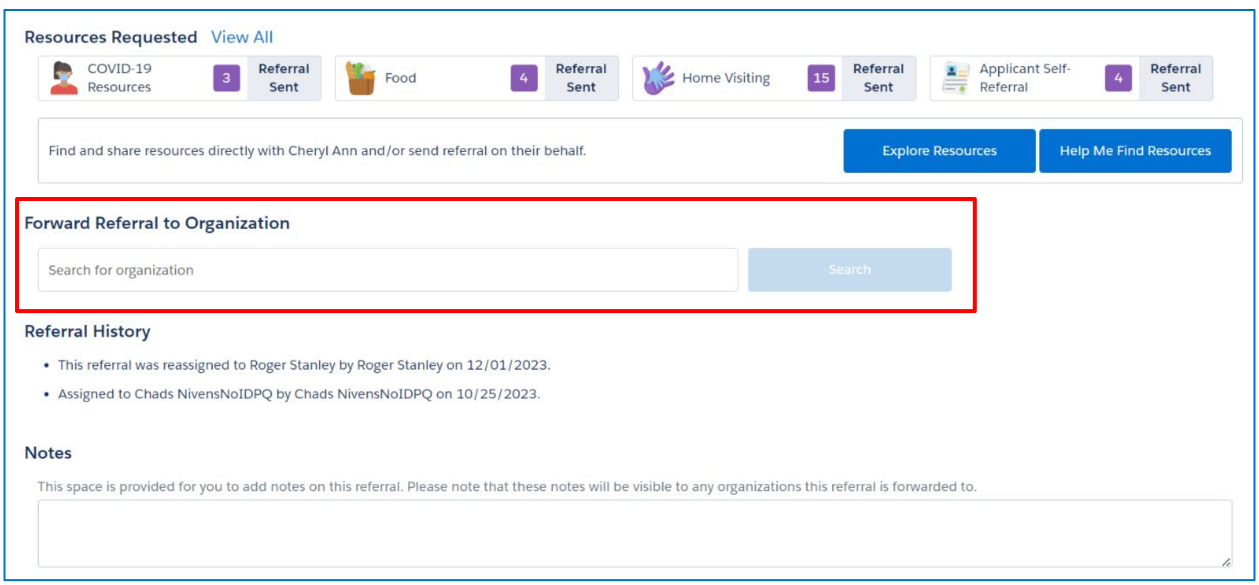
Forwarding a Referral

If you find you cannot assist a Referral Client, you can forward them to a different organization that may be able to assist them.

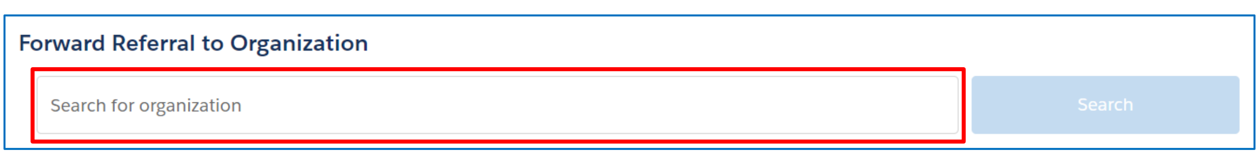
1. Click the **Client's Name** hyperlink next to the Referral Record from the **New** or **In Progress** tab.



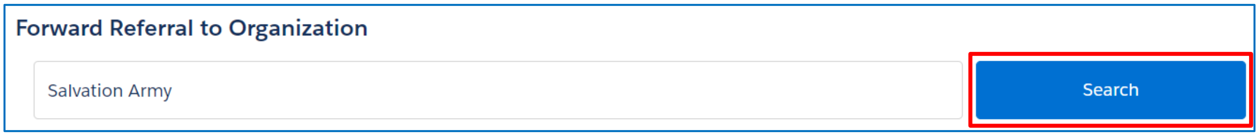
2. Scroll to the **Forward Referral to Organization** section.



3. Type a name of a **MI Bridges Referral Organization** in the search bar.



4. Click the blue **Search** button.

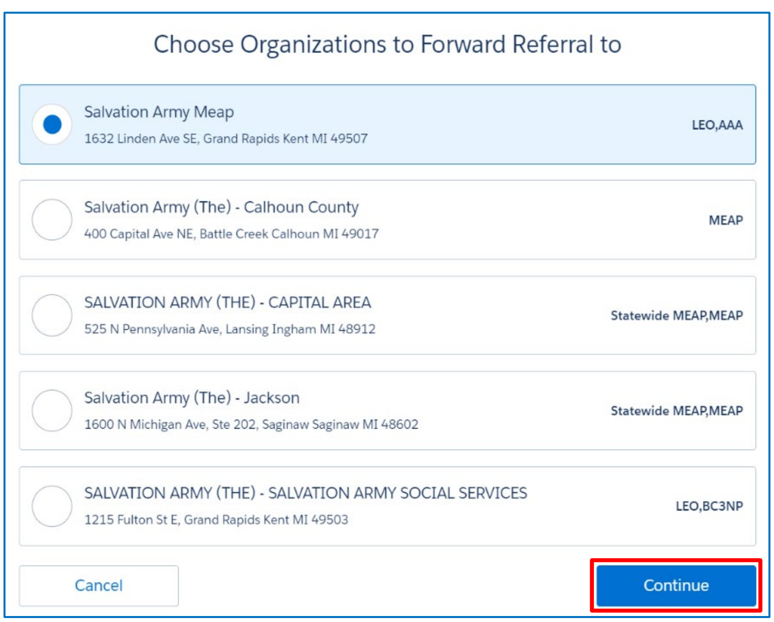


Notice a **Choose Organizations to Forward Referral** to pop up box appears.

Tip: If you need to exit out of this box, click the **Cancel** button.

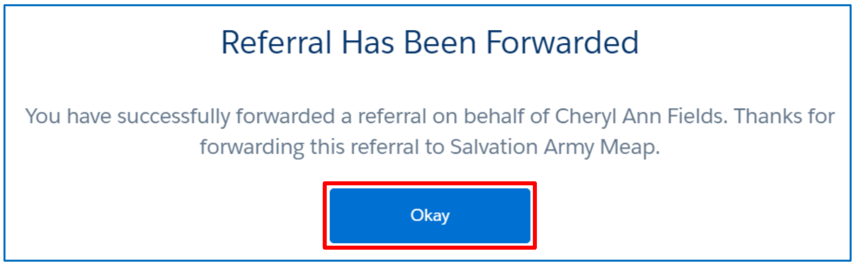
5. Select the **Organization** to forward Referral to.

6. Click the blue **Continue** button.

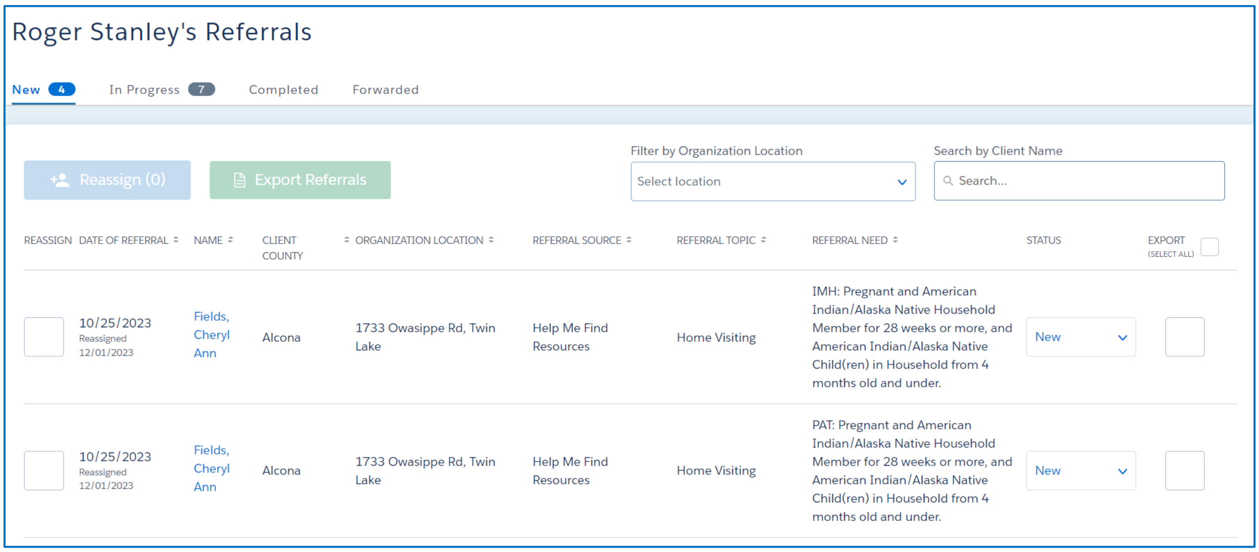


Notice a **Referral Has Been Forwarded** notification appears.

7. Click the blue **Okay** button.

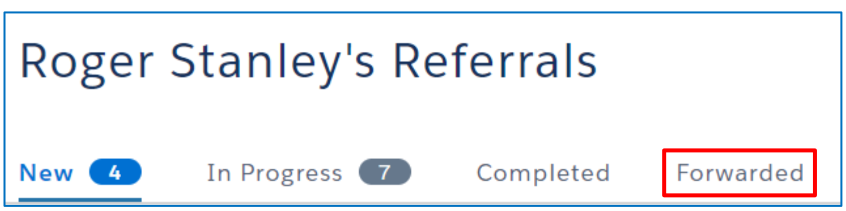


Notice you are redirected to the **Manage Referrals** page.

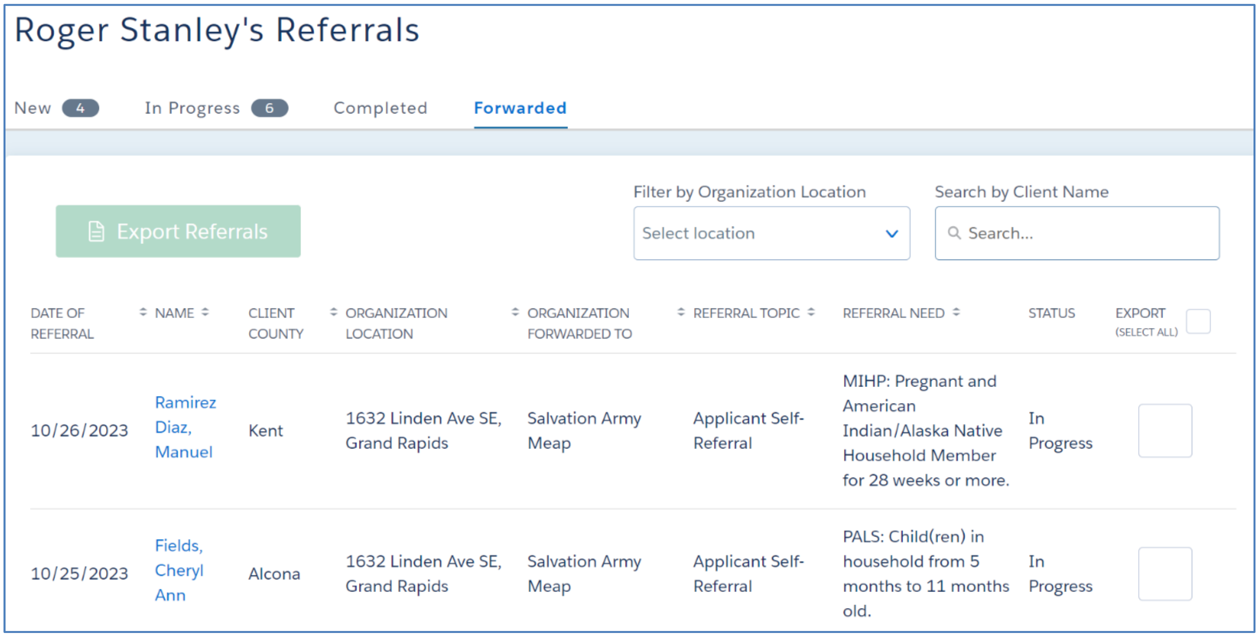


Note: You can see that the referral has now moved from the **New** or **In Progress** tab to the **Forwarded** tab as seen by the number decrease next to the tab.

To find the Forwarded Referral, click the **Forwarded** tab**.**



From here you can see all Referrals your organization forwarded to a different organization.



Roger Stanley's Referrals

New 4 | In Progress 6 | Completed | Forwarded

Export Referrals

Filter by Organization Location: Select location

Search by Client Name: Search...

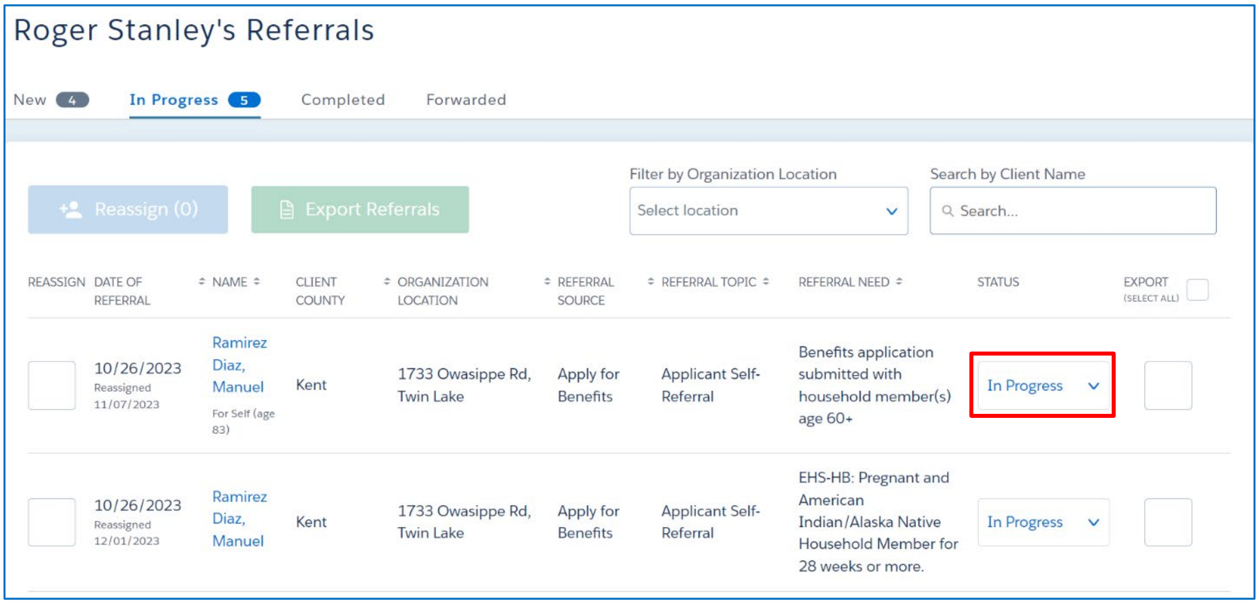
DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	ORGANIZATION FORWARDED TO	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
10/26/2023	Ramirez Diaz, Manuel	Kent	1632 Linden Ave SE, Grand Rapids	Salvation Army Meap	Applicant Self-Referral	MIHP: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.	In Progress	
10/25/2023	Fields, Cheryl Ann	Alcona	1632 Linden Ave SE, Grand Rapids	Salvation Army Meap	Applicant Self-Referral	PALS: Child(ren) in household from 5 months to 11 months old.	In Progress	

Note: Once a referral is forwarded, you cannot change the status or reassign the referral.

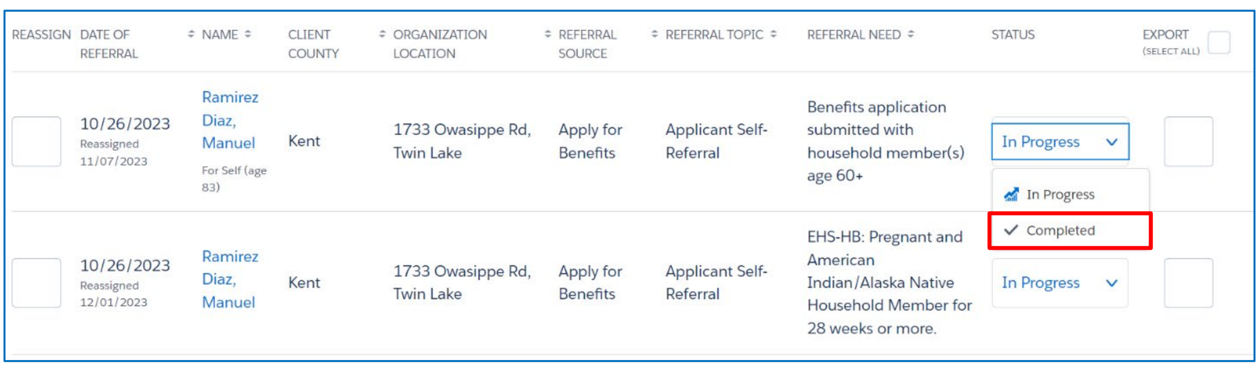
Closing a Referral

You can close a referral from the **New** or **In Progress** tab.

1. Click the **Status Dropdown** in the Status Column next to the Client Referral.

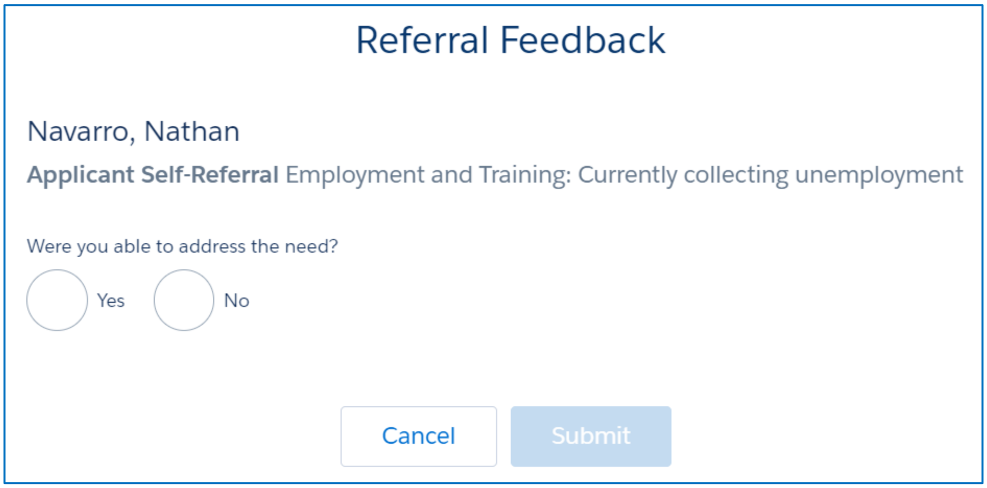


2. Click **Completed** from the Status dropdown.



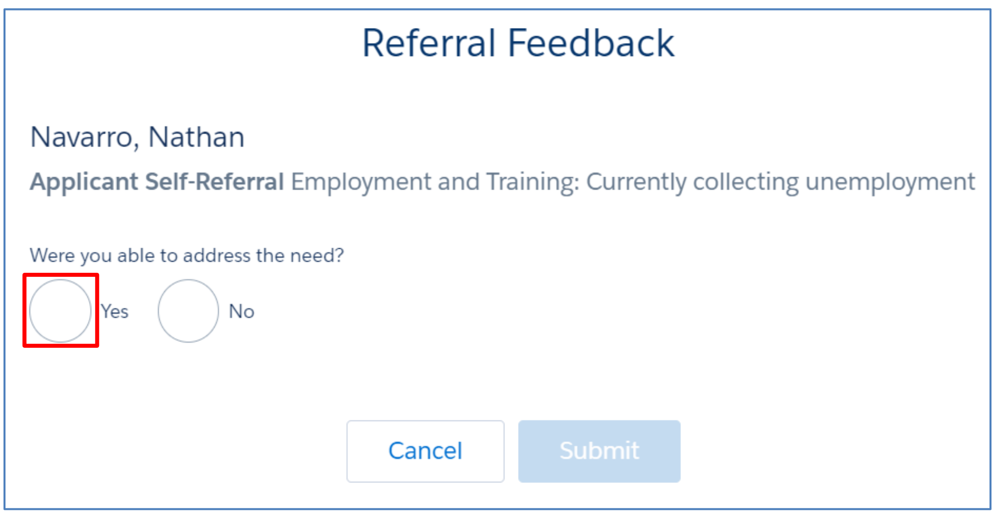
Notice a “Referral Feedback” pop up box appears. From here you can select:

- Yes, you were able to address the need of the client.
- No, you were not able to address the need of the client.

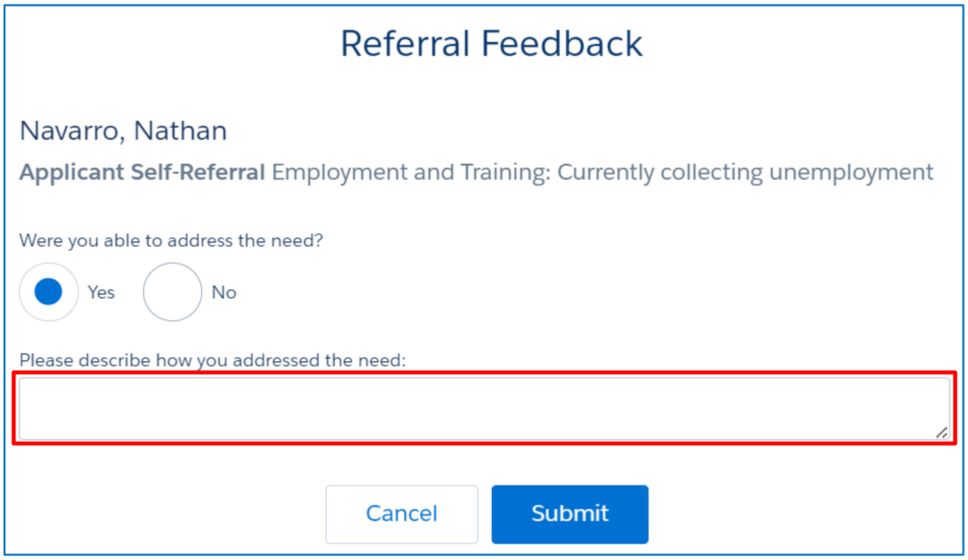


REFERRAL FEEDBACK: YES

1. Click **Yes** on the “Referral Feedback” pop up box.

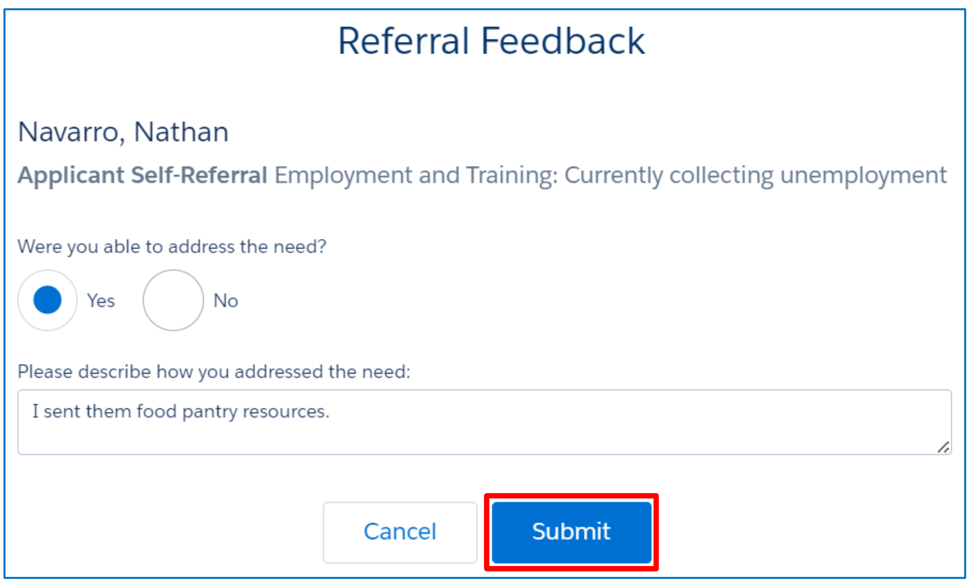


2. Notice a text box appears.
   Type how you addressed the client's need into the field.

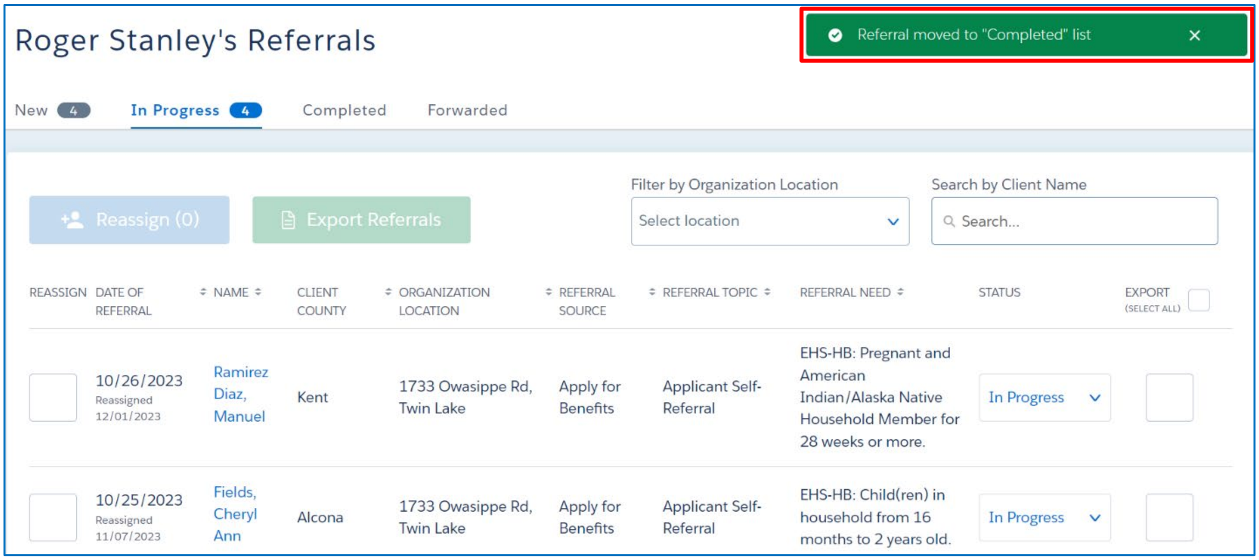


Note: This is an optional field.

3. Click the blue **Submit** button.



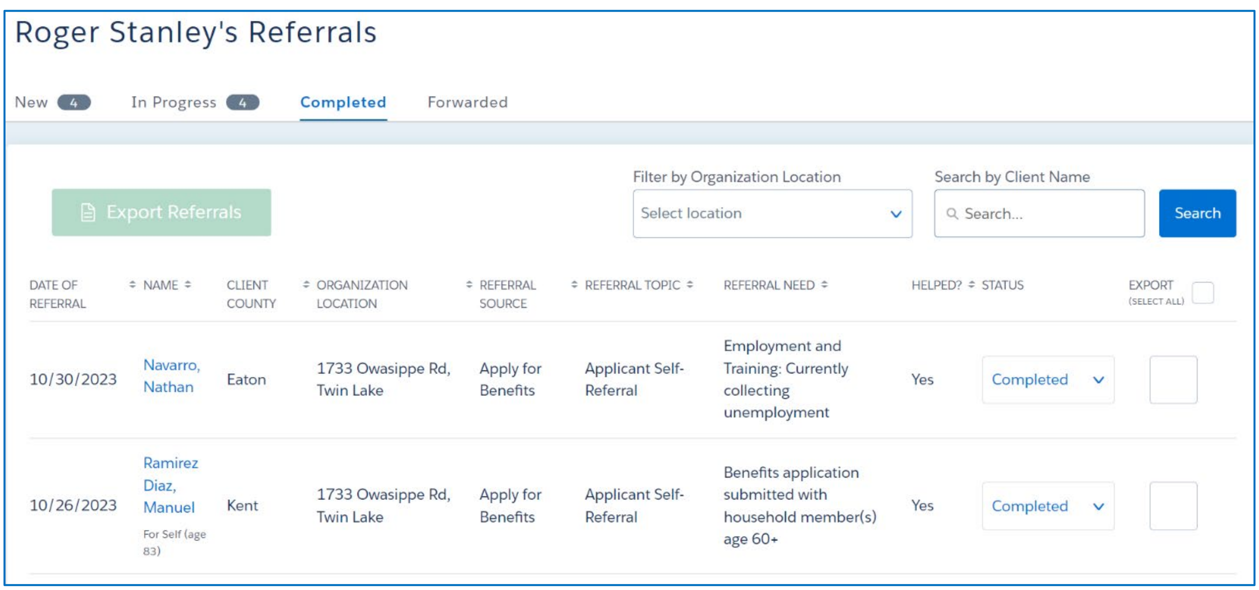
Notice that a green **Notification** pops up in the top right corner showing that your referral has been completed.



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 tab you are on and is reflected by the number decrease next to the tab name.

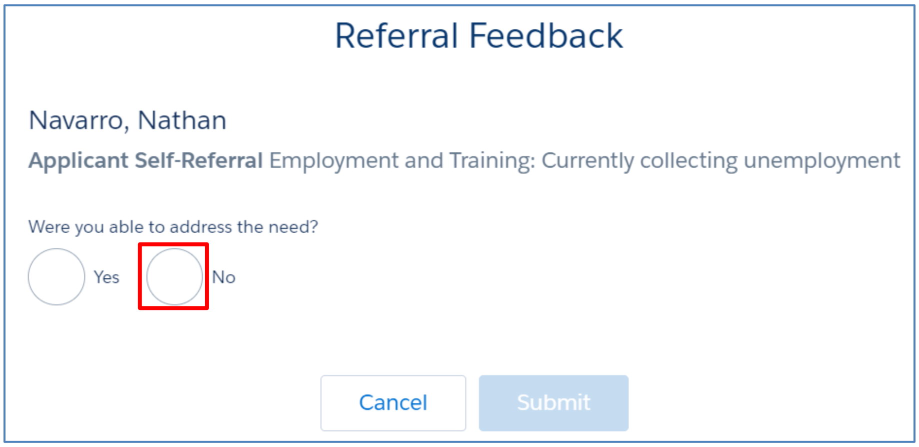
4. Click on the **Completed Tab** to find your newly Completed Referral(s).



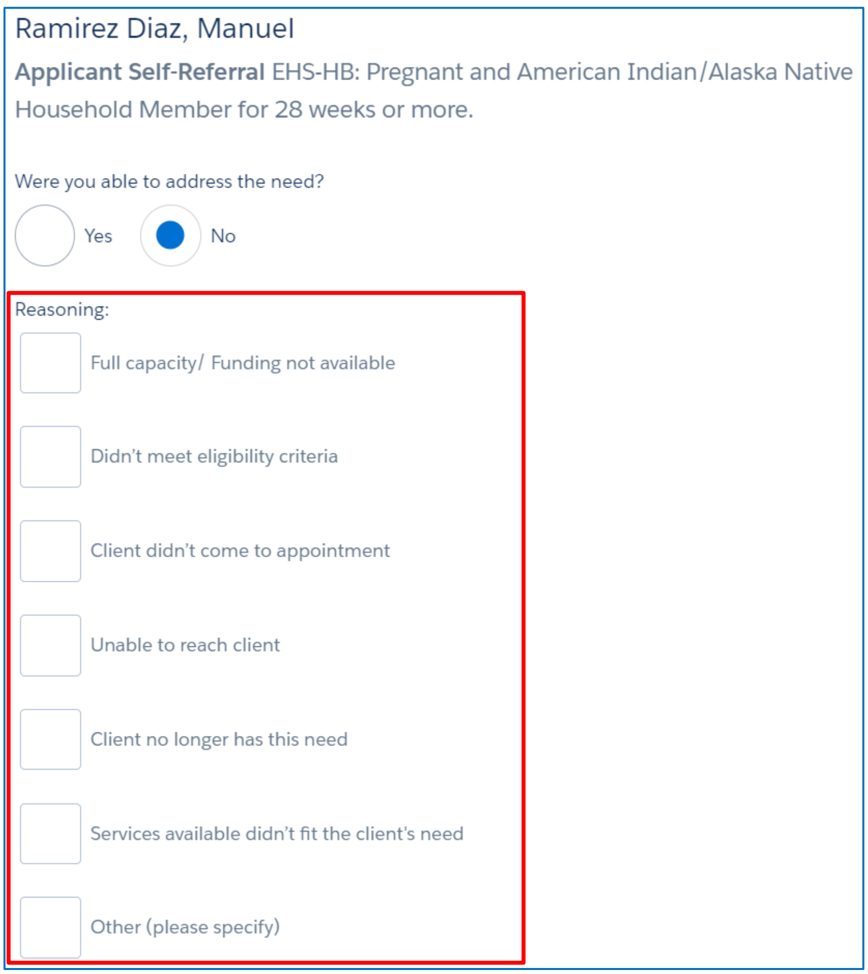
Note: One thing to note is that once a referral is marked as complete, you cannot reassign the referral.

Referral Feedback: No

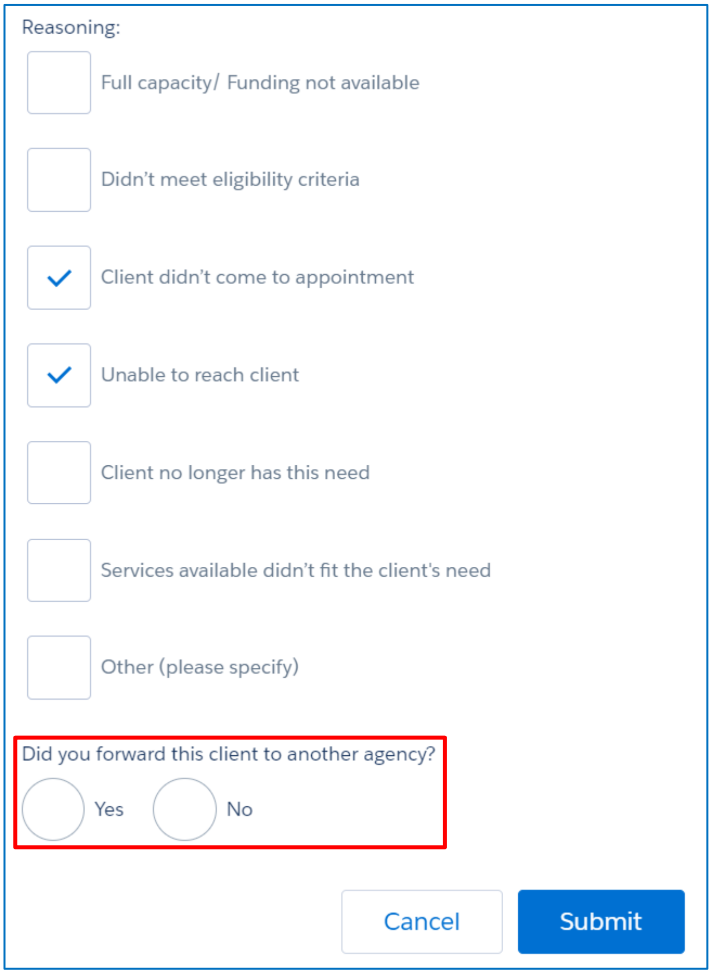
1. Click **No** on the Referral Feedback pop up box.



2. Notice "Reasoning" checkboxes appears.
   Check the box(es) that best identify the reasons on why you were not able to address the client's need.

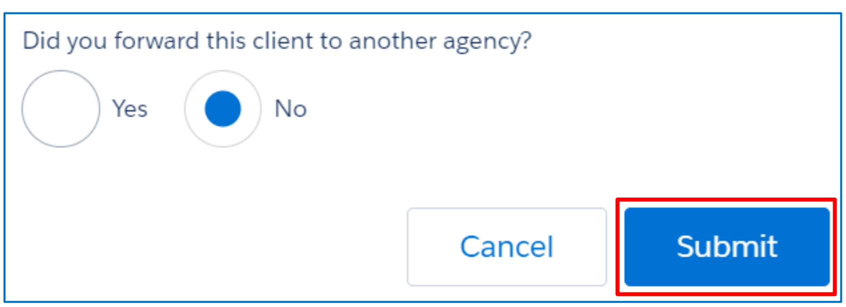


3. Answer the question with:
   - Yes, I forwarded the client to another agency.
   - No, I did not forward the client to another agency.

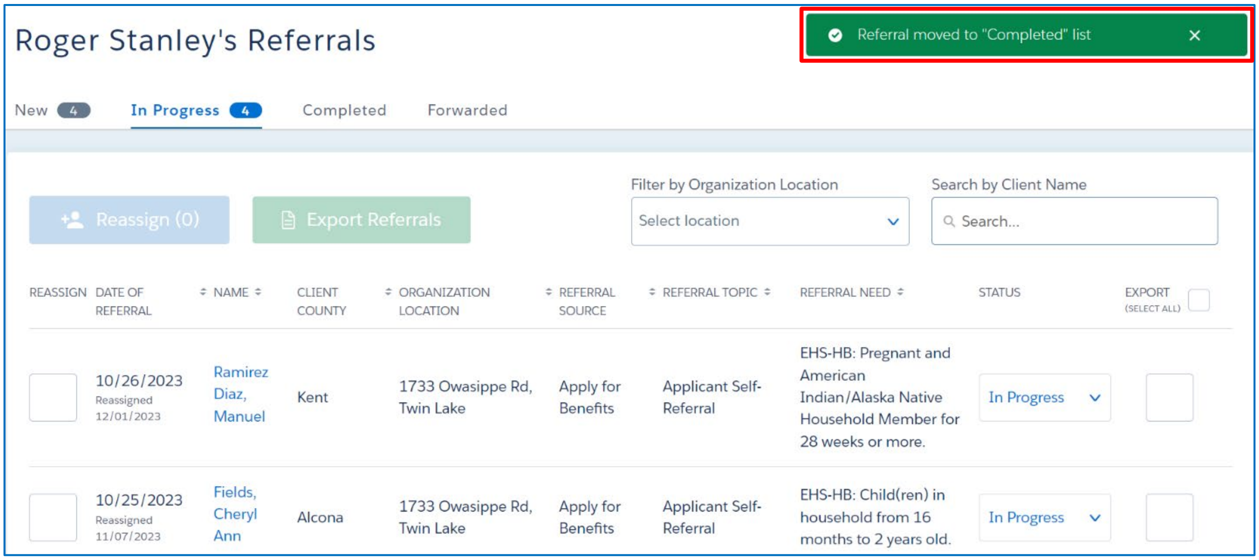


Note: If you click **Yes**, you will be asked to enter the organization's name that you forwarded the referral to.

4. Click the blue **Submit** button.



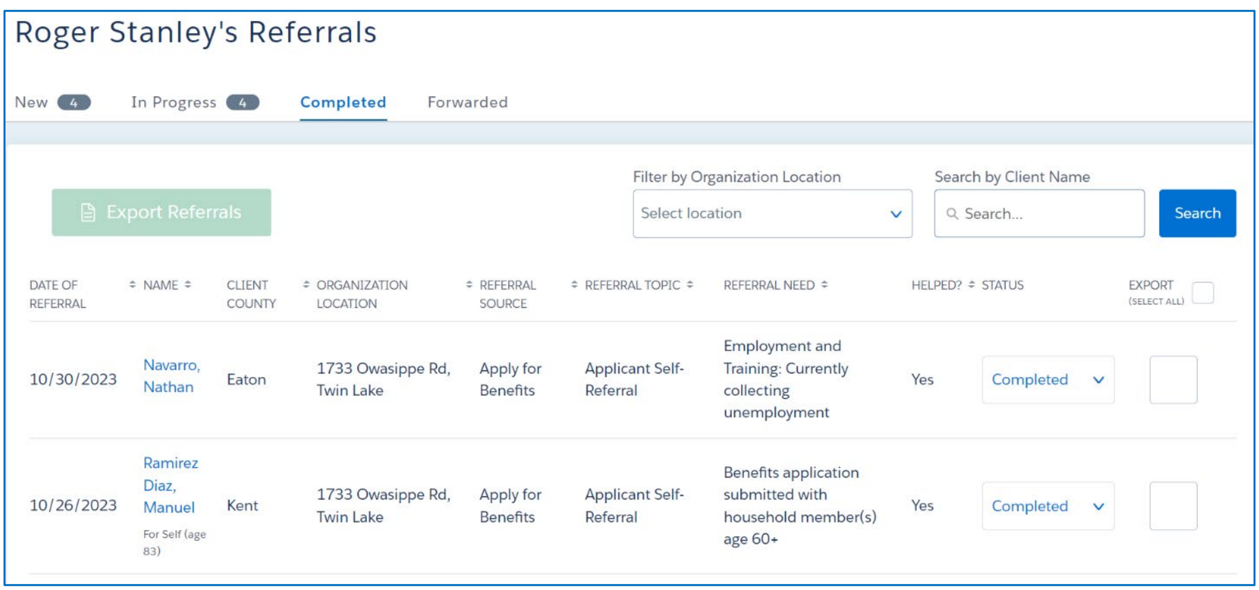
Notice that a green **Notification** pops up in the top right corner showing that your referral has been completed.



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 tab you are on to the **Completed** tab as seen by the number decrease next to the tab name.

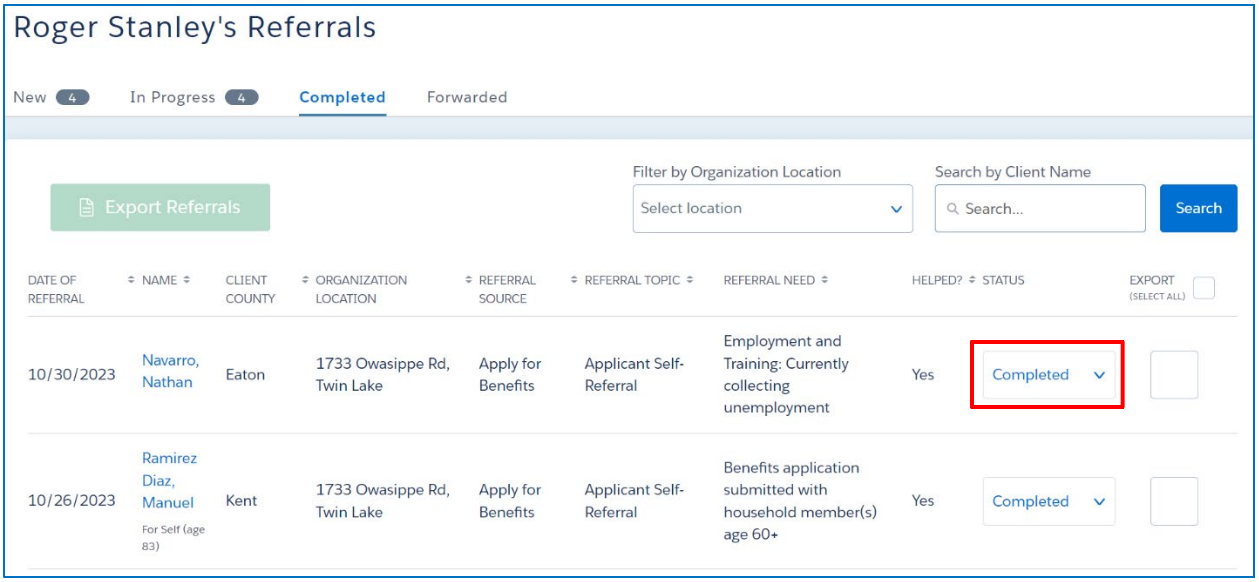
5. Click on the **Completed Tab** to find your newly Completed Referral(s).



Note: One thing to note is that once a referral is marked as complete, you cannot reassign the referral.

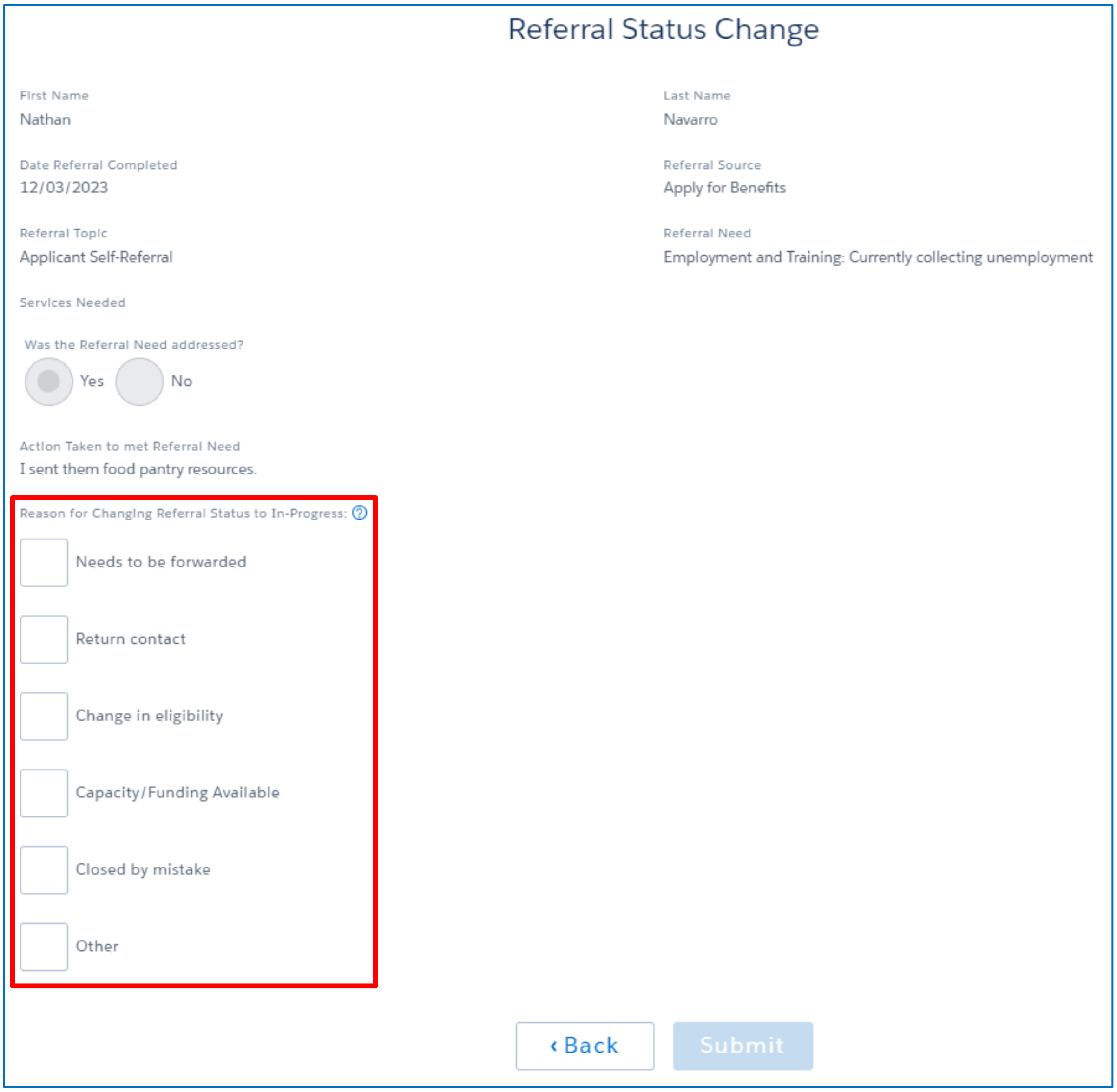
Changing the Status in the Completed Tab

1. Click the **Status Dropdown** in the Status Column next to the Client Referral in the Completed tab.



2. Click **In Progress** from the Status dropdown.

Notice a **Referral Feedback** pop up box appears. From here, check the box(es) that best explain the reason for changing Referral Status to **In Progress**.


Referral Status Change

First Name
Nathan

Last Name
Navarro

Date Referral Completed
12/03/2023

Referral Source
Apply for Benefits

Referral Topic
Applicant Self-Referral

Referral Need
Employment and Training: Currently collecting unemployment

Services Needed

Was the Referral Need addressed?
Yes No

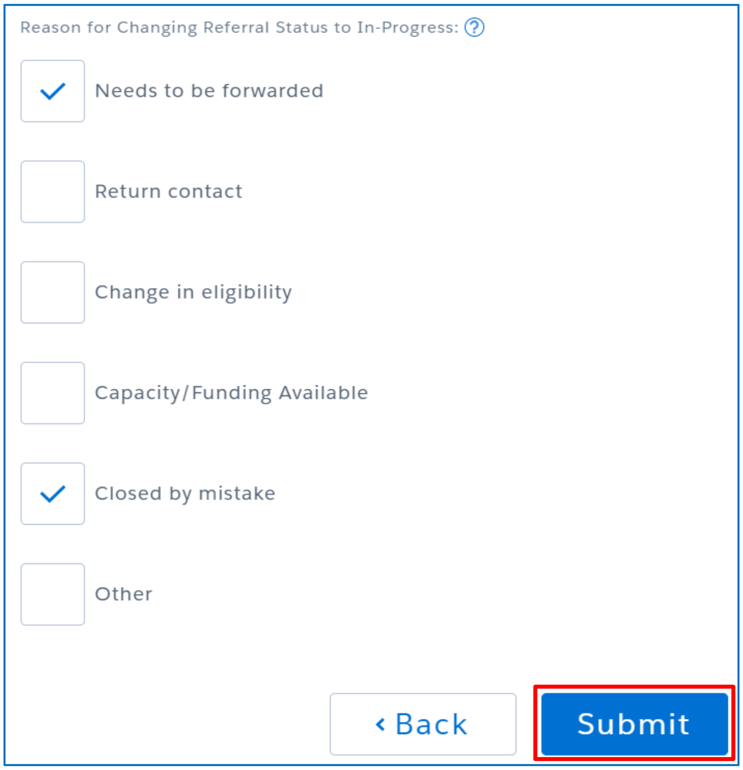
Action Taken to met Referral Need
I sent them food pantry resources.

Reason for Changing Referral Status to In-Progress:

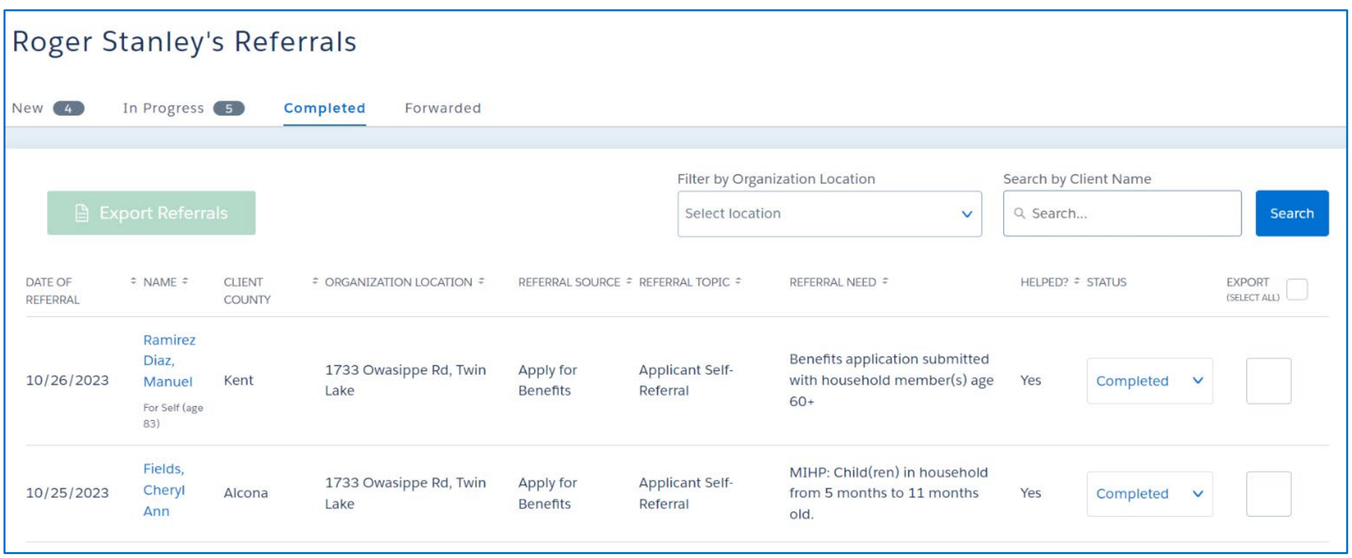
- [ ] Needs to be forwarded
- [ ] Return contact
- [ ] Change in eligibility
- [ ] Capacity/Funding Available
- [ ] Closed by mistake
- [ ] Other

‹ Back Submit

3. Click the blue **Submit** button.



Notice that the Referral has now been moved from the **Completed** tab to **In Progress** tab.

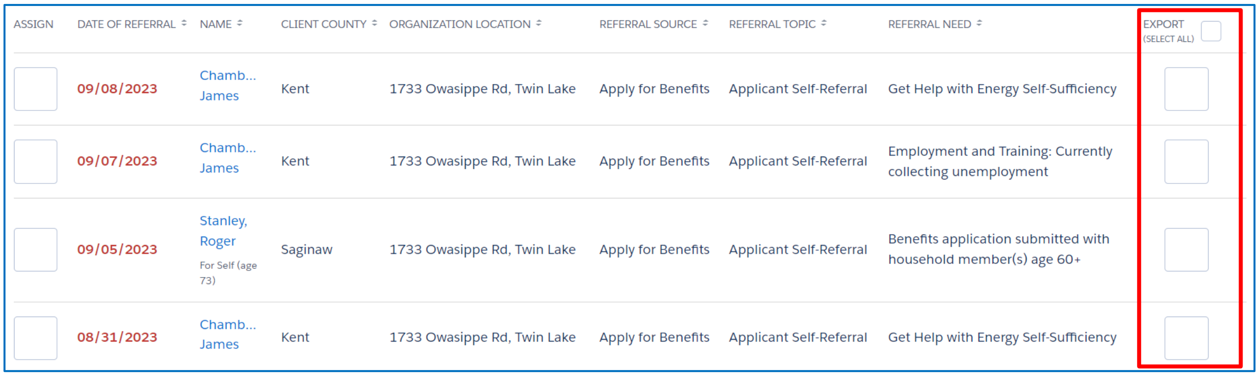


Important Tip: To see your updates, refresh your page by clicking **Home** on the Top Navigation Bar or right clicking your mouse and selecting **Refresh.**

Export Referrals

Note: You can Export Referrals from any of the tabs available in the Manage Referrals page.

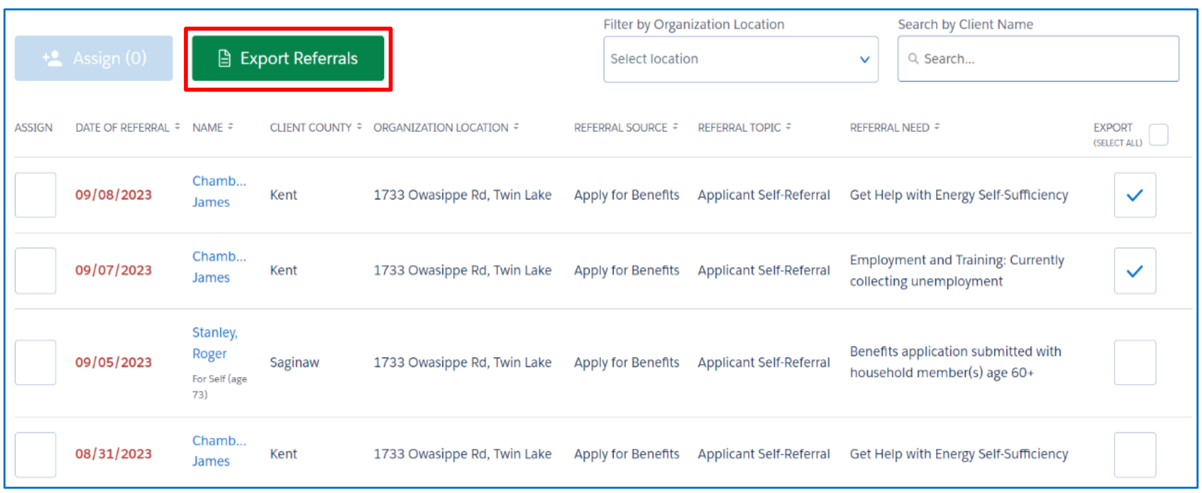
1. Click the **Export** check box(es) next to each referral record from the tab you are on.



ASSIGN	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	

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

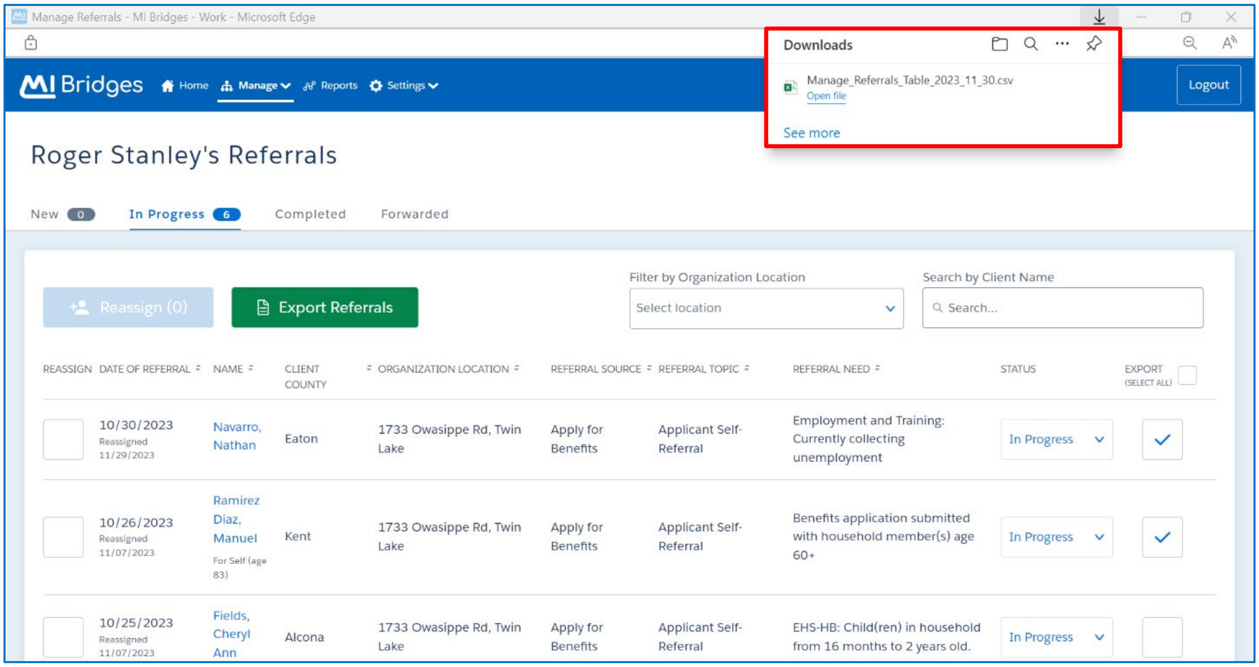
2. Once you have checked all the referrals(s) you would like to export, click the green **Export Referrals** button.



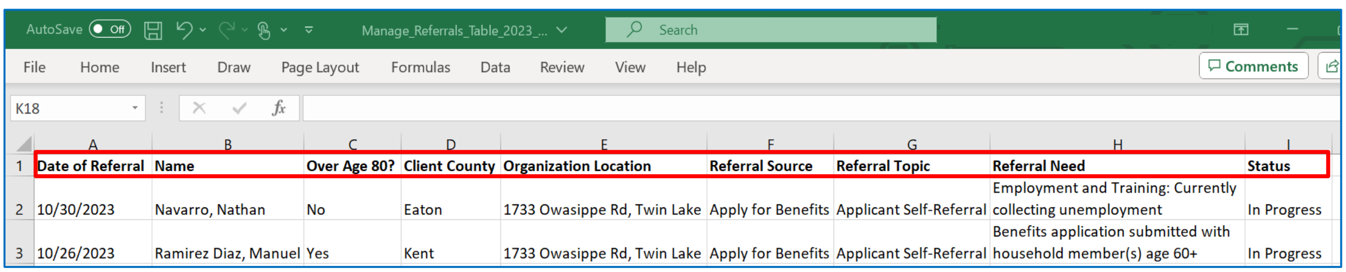
ASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	EXPORT (SELECT ALL)
	09/08/2023	Chamb... James	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Get Help with Energy Self-Sufficiency	✓
	09/07/2023	Chamb... James	Kent	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	

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

Notice a **Manage Referrals Table** downloads to your computer containing the referrals selected.



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



Date of Referral	Name	Over Age 80?	Client County	Organization Location	Referral Source	Referral Topic	Referral Need	Status
10/30/2023	Navarro, Nathan	No	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	In Progress
10/26/2023	Ramirez Diaz, Manuel	Yes	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	In Progress