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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.

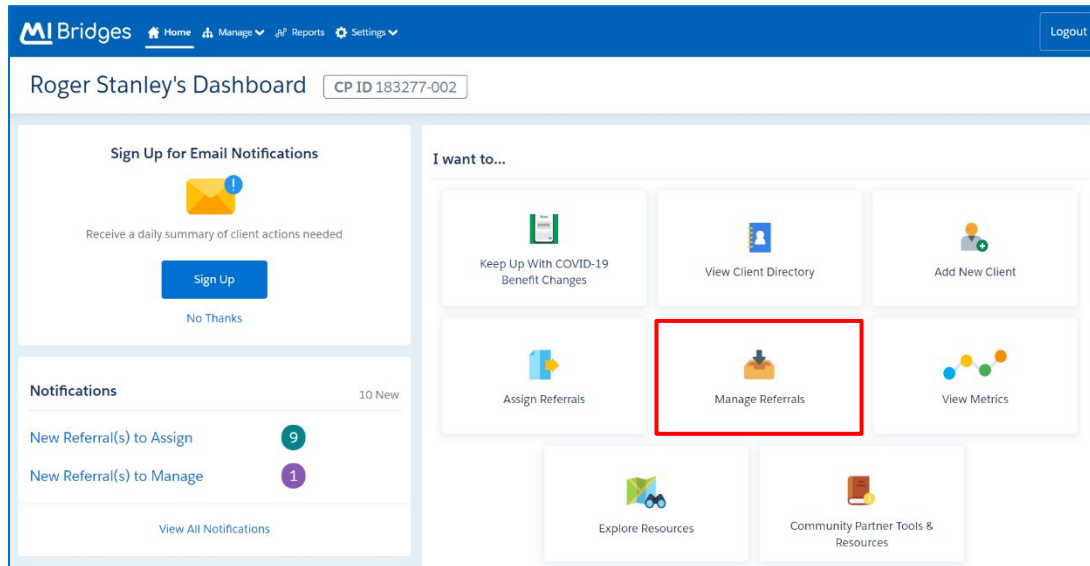


Note: For more information on how an LPOC can change a user's permission level, please view the [Manage Organization Job Aid](#).

Open the Manage Referrals Page

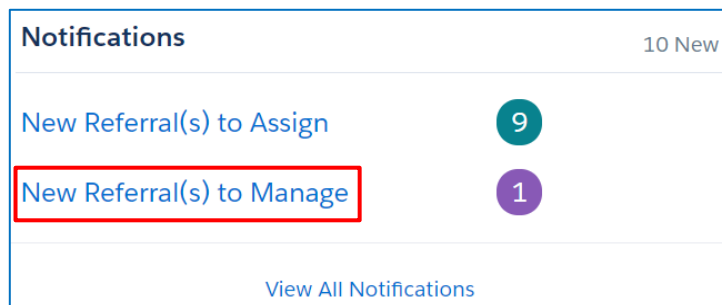
FROM THE MANAGE REFERRALS TILE

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.

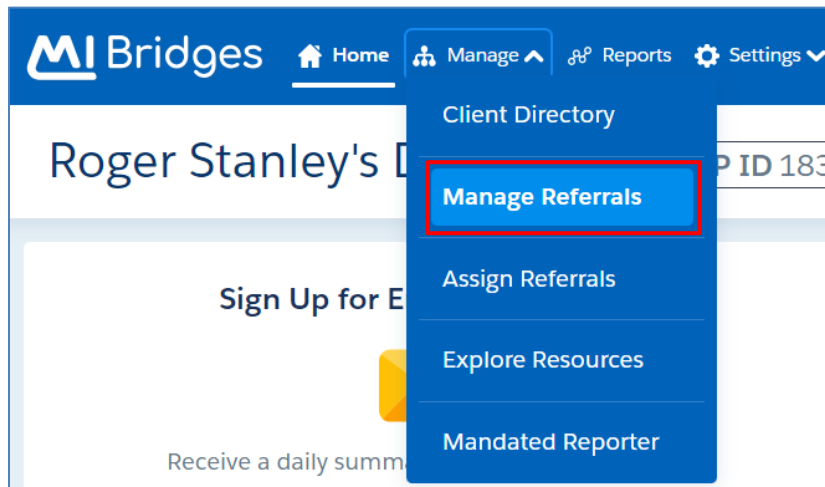


FROM THE TOP NAVIGATION BAR

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.

Roger Stanley's Referrals

New 4
In Progress 6
Completed
Forwarded

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

+ 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"/>	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 also reassign multiple clients at a time by selecting multiple checkboxes.

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

+ Reassign (2)
Export Referrals

Filter by Organization Location

Select location ▼

Search by Client Name

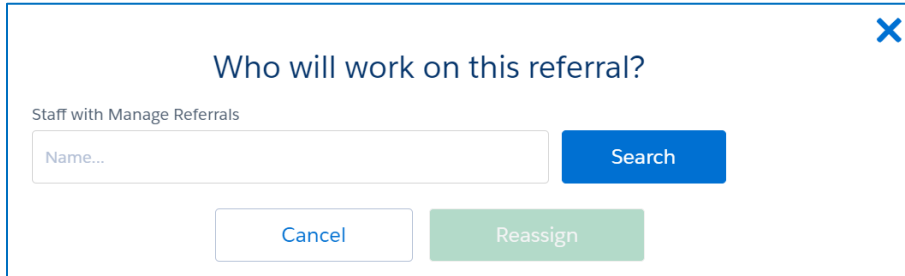
Q Search...

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input 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"/>

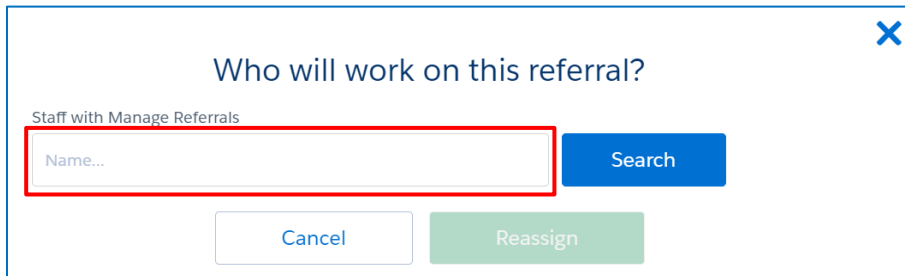


Note: The **Reassign** button is conveniently located at the top and the bottom of the tab.

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

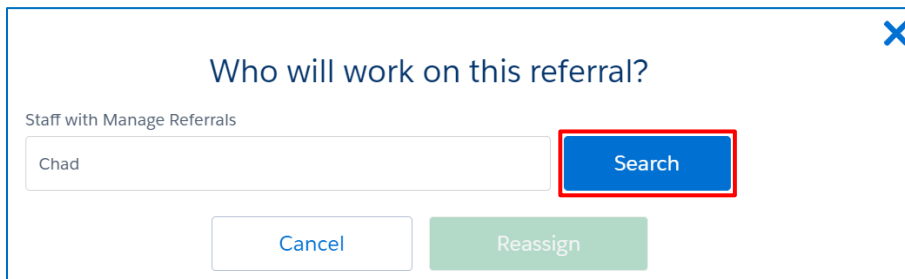


4. Type a Referral Partner's Name in the **Search** field that has the *Manage Referrals* permission.

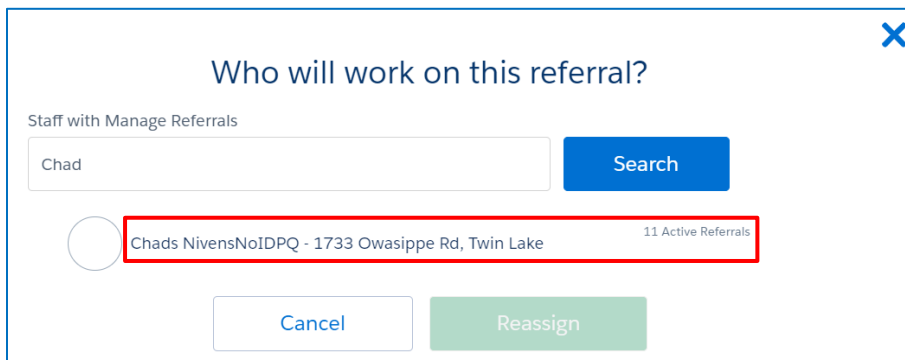



Tip: Remember to always enter at least 3 letters of the referral user's first or last name to search.

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**.

Who will work on this referral?

Staff with Manage Referrals

☒ Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 11 Active Referrals

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

Who will work on this referral?

Staff with Manage Referrals

☒ Chads NivensNoIDPQ - 1733 Owasippe Rd, Twin Lake 11 Active Referrals

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.

Roger Stanley's Referrals

☒ Reassigned 2 referrals to Chads NivensNoIDPQ

New 1

In Progress 6

Completed

Forwarded

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"/>	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.	New	<input type="checkbox"/>
<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"/>

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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**.

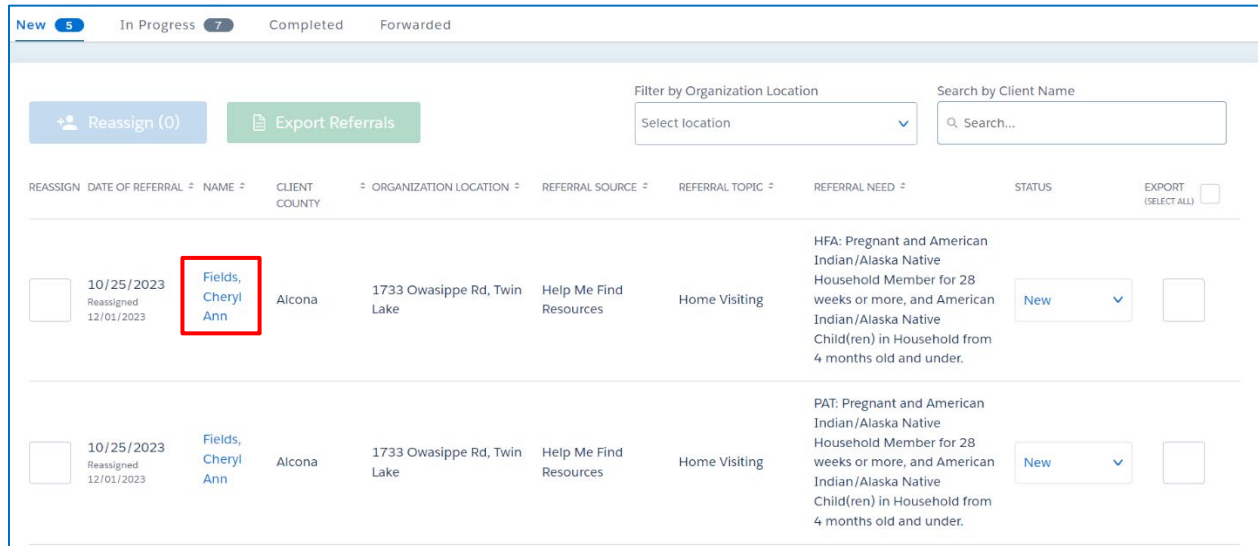


Note: The referral has been moved from the tab you are on and is reflected by the number decrease next to the tab name.

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.

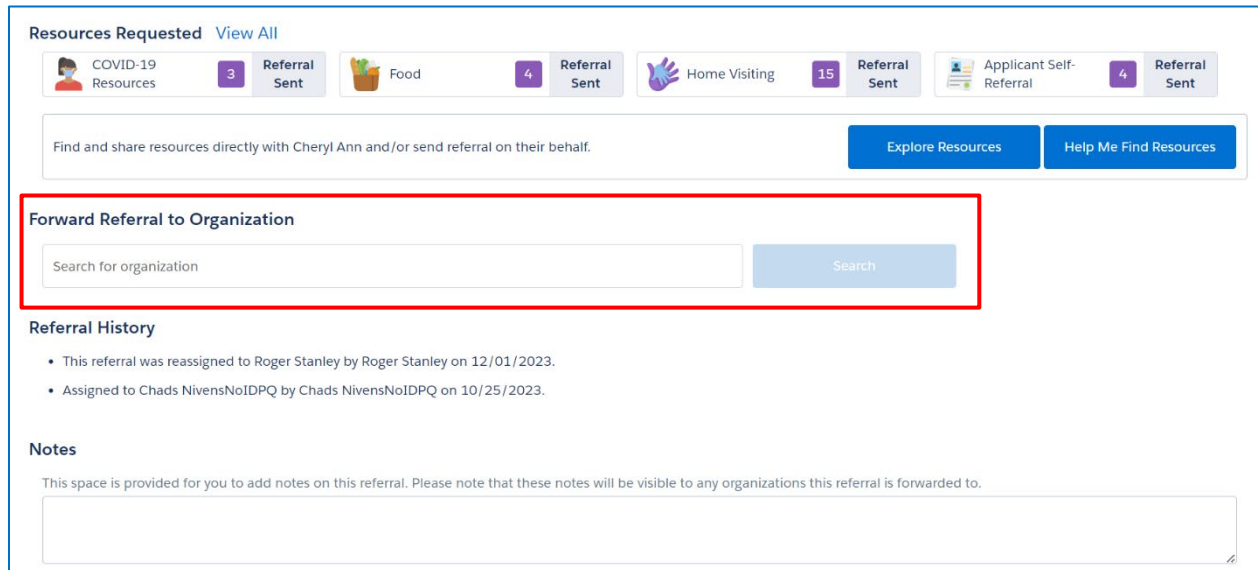
1. Click the **Client's Name** hyperlink next to the Referral Record from the **New** or **In Progress** tab.



The screenshot shows the 'Manage Referrals' dashboard. At the top, there are tabs for 'New' (5), 'In Progress' (7), 'Completed', and 'Forwarded'. Below the tabs are buttons for 'Reassign (0)' and 'Export Referrals'. A filter section includes 'Filter by Organization Location' (a dropdown menu) and 'Search by Client Name' (a text input field). Below this is a table of referrals. The first row is highlighted, and the client's name 'Fields, Cheryl Ann' is highlighted with a red box. The table columns are: REASSIGN, DATE OF REFERRAL, NAME, CLIENT COUNTY, ORGANIZATION LOCATION, REFERRAL SOURCE, REFERRAL TOPIC, REFERRAL NEED, STATUS, and EXPORT (SELECT ALL).

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/25/2023 Reassigned 12/01/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Help Me Find Resources	Home Visiting	HFA: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more, and American Indian/Alaska Native Child(ren) in Household from 4 months old and under.	New	<input type="checkbox"/>
<input type="checkbox"/>	10/25/2023 Reassigned 12/01/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Help Me Find Resources	Home Visiting	PAT: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more, and American Indian/Alaska Native Child(ren) in Household from 4 months old and under.	New	<input type="checkbox"/>

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



The screenshot shows the 'Forward Referral to Organization' section. At the top, there are 'Resources Requested' and 'View All' links. Below this are icons for 'COVID-19 Resources' (3), 'Food' (4), 'Home Visiting' (15), and 'Applicant Self-Referral' (4). A search bar is present with the text 'Find and share resources directly with Cheryl Ann and/or send referral on their behalf.' Below the search bar is a section titled 'Forward Referral to Organization' which contains a search input field and a 'Search' button. Below this is a 'Referral History' section with a list of referrals. At the bottom is a 'Notes' section with a text area for adding notes.

Resources Requested View All

COVID-19 Resources 3 Referral Sent Food 4 Referral Sent Home Visiting 15 Referral Sent Applicant Self-Referral 4 Referral Sent

Find and share resources directly with Cheryl Ann and/or send referral on their behalf. Explore Resources Help Me Find Resources

Forward Referral to Organization

Search for organization Search

Referral History

- This referral was reassigned to Roger Stanley by Roger Stanley on 12/01/2023.
- Assigned to Chads NivensNoIDPQ by Chads NivensNoIDPQ on 10/25/2023.

Notes

This space is provided for you to add notes on this referral. Please note that these notes will be visible to any organizations this referral is forwarded to.

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



The screenshot shows the 'Forward Referral to Organization' section. It contains a search input field and a 'Search' button. The search input field is highlighted with a red box.

Forward Referral to Organization

Search for organization Search

- Click the blue **Search** button.

Forward Referral to Organization

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.

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

Choose Organizations to Forward Referral to

☒

Salvation Army Meap
1632 Linden Ave SE, Grand Rapids Kent MI 49507

LEO,AAA

☐

Salvation Army (The) - Calhoun County
400 Capital Ave NE, Battle Creek Calhoun MI 49017

MEAP

☐

SALVATION ARMY (THE) - CAPITAL AREA
525 N Pennsylvania Ave, Lansing Ingham MI 48912

Statewide MEAP,MEAP

☐

Salvation Army (The) - Jackson
1600 N Michigan Ave, Ste 202, Saginaw Saginaw MI 48602

Statewide MEAP,MEAP

☐

SALVATION ARMY (THE) - SALVATION ARMY SOCIAL SERVICES
1215 Fulton St E, Grand Rapids Kent MI 49503

LEO,BC3NP

- Click the blue **Continue** button.

Choose Organizations to Forward Referral to

☒

Salvation Army Meap
1632 Linden Ave SE, Grand Rapids Kent MI 49507

LEO,AAA

☐

Salvation Army (The) - Calhoun County
400 Capital Ave NE, Battle Creek Calhoun MI 49017

MEAP

☐

SALVATION ARMY (THE) - CAPITAL AREA
525 N Pennsylvania Ave, Lansing Ingham MI 48912

Statewide MEAP,MEAP

☐

Salvation Army (The) - Jackson
1600 N Michigan Ave, Ste 202, Saginaw Saginaw MI 48602

Statewide MEAP,MEAP

☐

SALVATION ARMY (THE) - SALVATION ARMY SOCIAL SERVICES
1215 Fulton St E, Grand Rapids Kent MI 49503

LEO,BC3NP

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

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

Referral Has Been Forwarded

You have successfully forwarded a referral on behalf of Cheryl Ann Fields. Thanks for forwarding this referral to Salvation Army Meap.

Okay

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

Roger Stanley's Referrals


New 4
In Progress 7
Completed
Forwarded

Reassign (0)
Export Referrals

Filter by Organization Location

Search by Client Name

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/25/2023 <small>Reassigned 12/01/2023</small>	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Help Me Find Resources	Home Visiting	IMH: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more, and American Indian/Alaska Native Child(ren) in Household from 4 months old and under.	New ▼	<input type="checkbox"/>
<input type="checkbox"/>	10/25/2023 <small>Reassigned 12/01/2023</small>	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Help Me Find Resources	Home Visiting	PAT: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more, and American Indian/Alaska Native Child(ren) in Household from 4 months old and under.	New ▼	<input type="checkbox"/>



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.

Roger Stanley's Referrals

New 4
In Progress 7
Completed
Forwarded

State of Michigan
Department of Health and Human Services

Page 9 of 22

Manage Referrals
Last Updated: 12/11/2023

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

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	ORGANIZATION FORWARDED TO	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL) <input type="checkbox"/>
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	<input type="checkbox"/>
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	<input type="checkbox"/>



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.

Roger Stanley's Referrals

New **4** **In Progress 5** Completed Forwarded

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"/>	10/26/2023 Reassigned 11/07/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	In Progress	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023 Reassigned 12/01/2023	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.	In Progress	<input type="checkbox"/>

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

REASSIGN	DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	STATUS	EXPORT (SELECT ALL)
<input type="checkbox"/>	10/26/2023 Reassigned 11/07/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	<div>In Progress</div> <div>In Progress</div> <div>✓ Completed</div>	<input type="checkbox"/>
<input type="checkbox"/>	10/26/2023 Reassigned 12/01/2023	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.	In Progress	<input type="checkbox"/>

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

Navarro, Nathan

Applicant Self-Referral Employment and Training: Currently collecting unemployment

Were you able to address the need?

☐ Yes ☐ No

REFERRAL FEEDBACK: YES

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

Referral Feedback

Navarro, Nathan

Applicant Self-Referral Employment and Training: Currently collecting unemployment

Were you able to address the need?

☒ Yes ☐ No

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

Referral Feedback


Navarro, Nathan

Applicant Self-Referral Employment and Training: Currently collecting unemployment

Were you able to address the need?

☒ Yes ☐ No

Please describe how you addressed the need:



Note: This is an optional field.

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

Referral Feedback

Navarro, Nathan

Applicant Self-Referral Employment and Training: Currently collecting unemployment

Were you able to address the need?


☒ Yes ☐ No

Please describe how you addressed the need:

I sent them food pantry resources.

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

Roger Stanley's Referrals



New **4** In Progress **4** Completed Forwarded

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"/>	10/26/2023 Reassigned 12/01/2023	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.	In Progress	<input type="checkbox"/>
<input type="checkbox"/>	10/25/2023 Reassigned 11/07/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Child(ren) in household from 16 months to 2 years old.	In Progress	<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 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).

Roger Stanley's Referrals

New **4** In Progress **4** **Completed** Forwarded

Export Referrals

Filter by Organization Location
Select location

Search by Client Name
Q Search...

Search

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	HELPED?	STATUS	EXPORT (SELECT ALL)
10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	Yes	Completed	<input type="checkbox"/>
10/26/2023 For Self (age 83)	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Yes	Completed	<input type="checkbox"/>



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.

Referral Feedback

Navarro, Nathan

Applicant Self-Referral Employment and Training: Currently collecting unemployment

Were you able to address the need?

☐ Yes
 ☒ No

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.

Ramirez Diaz, Manuel

Applicant Self-Referral EHS-HB: Pregnant and American Indian/Alaska Native Household Member for 28 weeks or more.

Were you able to address the need?

☐ Yes
 ☒ No

Reasoning:

☐ Full capacity/ Funding not available

☐ Didn't meet eligibility criteria

☐ Client didn't come to appointment

☐ Unable to reach client

☐ Client no longer has this need

☐ Services available didn't fit the client's need

☐ Other (please specify)

3. Answer the question with:

- Yes, I forwarded the client to another agency.
- No, I did not forward the client to another agency.

Reasoning:

☐ Full capacity/ Funding not available

☐ Didn't meet eligibility criteria

☒ Client didn't come to appointment

☒ Unable to reach client

☐ Client no longer has this need

☐ Services available didn't fit the client's need

☐ Other (please specify)

Did you forward this client to another agency?
☐ Yes ☐ No

Cancel

Submit



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.


Did you forward this client to another agency?
☐ Yes ☒ No

Cancel

Submit

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

Roger Stanley's Referrals



New **4** In Progress **4** Completed Forwarded

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"/>	10/26/2023 Reassigned 12/01/2023	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.	In Progress	<input type="checkbox"/>
<input type="checkbox"/>	10/25/2023 Reassigned 11/07/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Child(ren) in household from 16 months to 2 years old.	In Progress	<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 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).

Roger Stanley's Referrals

New **4** In Progress **4** **Completed** Forwarded

Export Referrals

Filter by Organization Location
Select location

Search by Client Name
Q Search...

Search

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	HELPED?	STATUS	EXPORT (SELECT ALL)
10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	Yes	Completed	<input type="checkbox"/>
10/26/2023 For Self (age 83)	Ramirez Diaz, Manuel	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Yes	Completed	<input type="checkbox"/>



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.

Roger Stanley's Referrals

New **4** In Progress **4** **Completed** Forwarded

Export Referrals

Filter by Organization Location: Search by Client Name:

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	HELPED?	STATUS	EXPORT (SELECT ALL)
10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	Yes	Completed	<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+	Yes	Completed	<input type="checkbox"/>

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

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	HELPED?	STATUS	EXPORT (SELECT ALL)
10/30/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	Yes	<div>Completed </div> <div>In Progress </div>	<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+	Yes	<div>Completed </div> <div>Completed </div>	<input type="checkbox"/>

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? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Action Taken to met Referral Need I sent them food pantry resources.	
Reason for Changing Referral Status to In-Progress: ⓘ	
<input type="checkbox"/> Needs to be forwarded	
<input type="checkbox"/> Return contact	
<input type="checkbox"/> Change in eligibility	
<input type="checkbox"/> Capacity/Funding Available	
<input type="checkbox"/> Closed by mistake	
<input type="checkbox"/> Other	

[< Back](#)[Submit](#)

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

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

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

Roger Stanley's Referrals

New 4 In Progress 5 **Completed** Forwarded

Export Referrals

Filter by Organization Location
Select location

Search by Client Name
Search...

Search

DATE OF REFERRAL	NAME	CLIENT COUNTY	ORGANIZATION LOCATION	REFERRAL SOURCE	REFERRAL TOPIC	REFERRAL NEED	HELPED?	STATUS	EXPORT (SELECT ALL)
10/26/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	Yes	Completed	<input type="checkbox"/>
10/25/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	MIHP: Child(ren) in household from 5 months to 11 months old.	Yes	Completed	<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**.

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)
<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"/>
<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"/>



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 (0)

Export Referrals

Filter by Organization Location
Select location

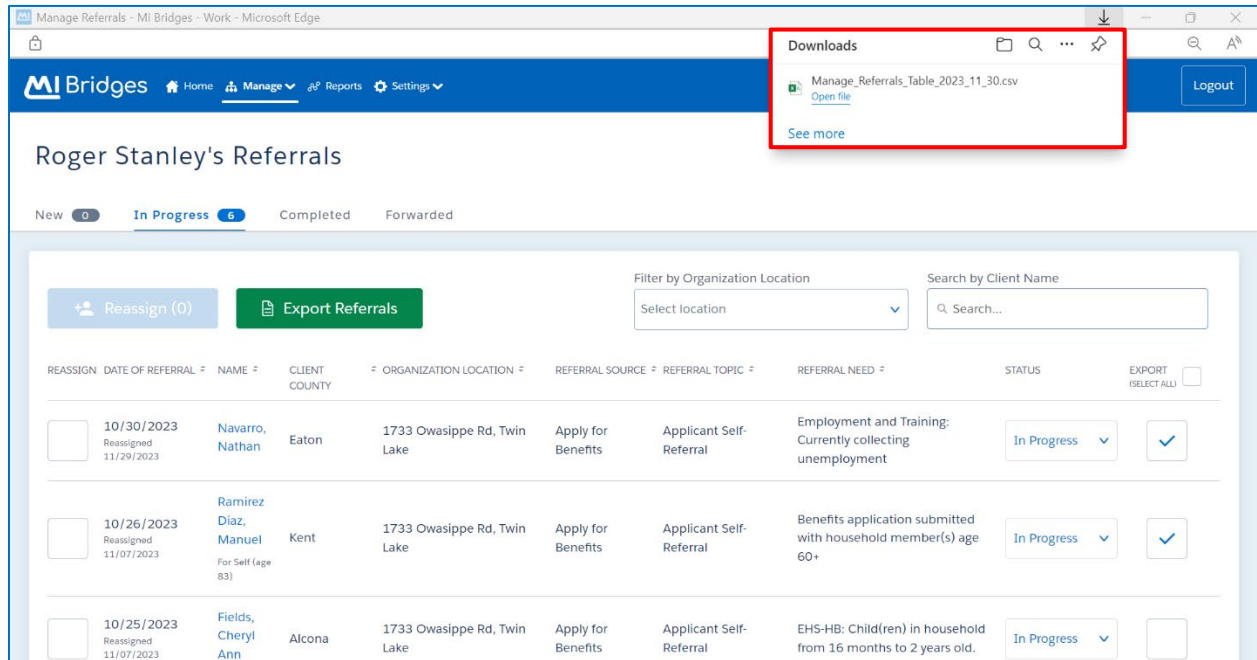
Search by Client Name
Search...

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 checked="" 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 checked="" 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"/>	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"/>



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.



MI Bridges Home Manage Reports Settings Logout

Roger Stanley's Referrals

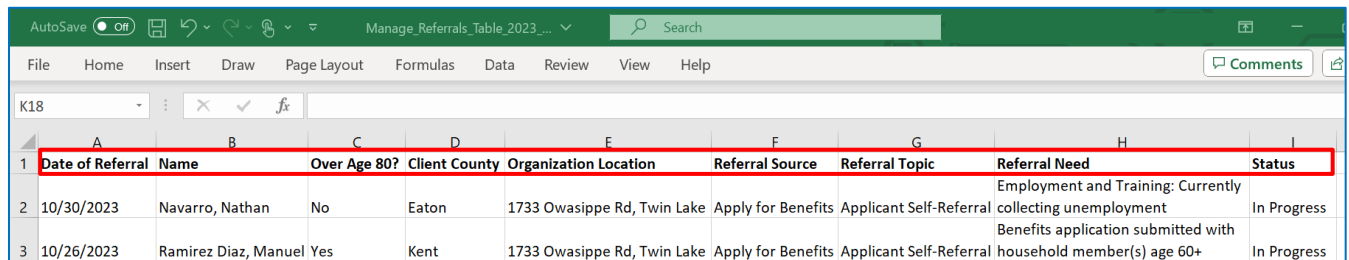
New 0 In Progress 6 Completed Forwarded

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"/>	10/30/2023 Reassigned 11/29/2023	Navarro, Nathan	Eaton	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Employment and Training: Currently collecting unemployment	In Progress	<input checked="" type="checkbox"/>
<input type="checkbox"/>	10/26/2023 Reassigned 11/07/2023	Ramirez Diaz, Manuel For Self (age 83)	Kent	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	Benefits application submitted with household member(s) age 60+	In Progress	<input checked="" type="checkbox"/>
<input type="checkbox"/>	10/25/2023 Reassigned 11/07/2023	Fields, Cheryl Ann	Alcona	1733 Owasippe Rd, Twin Lake	Apply for Benefits	Applicant Self-Referral	EHS-HB: Child(ren) in household from 16 months to 2 years old.	In Progress	<input type="checkbox"/>

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



	A	B	C	D	E	F	G	H	I
1	Date of Referral	Name	Over Age 80?	Client County	Organization Location	Referral Source	Referral Topic	Referral Need	Status
2	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
3	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