



Referral Management

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

Important Information

With MI Bridges there are specific features only available for community partners who have the referral partner level. In order to effectively manage incoming referrals, users will need to be given the Assign Referral and Manage Referral permissions.

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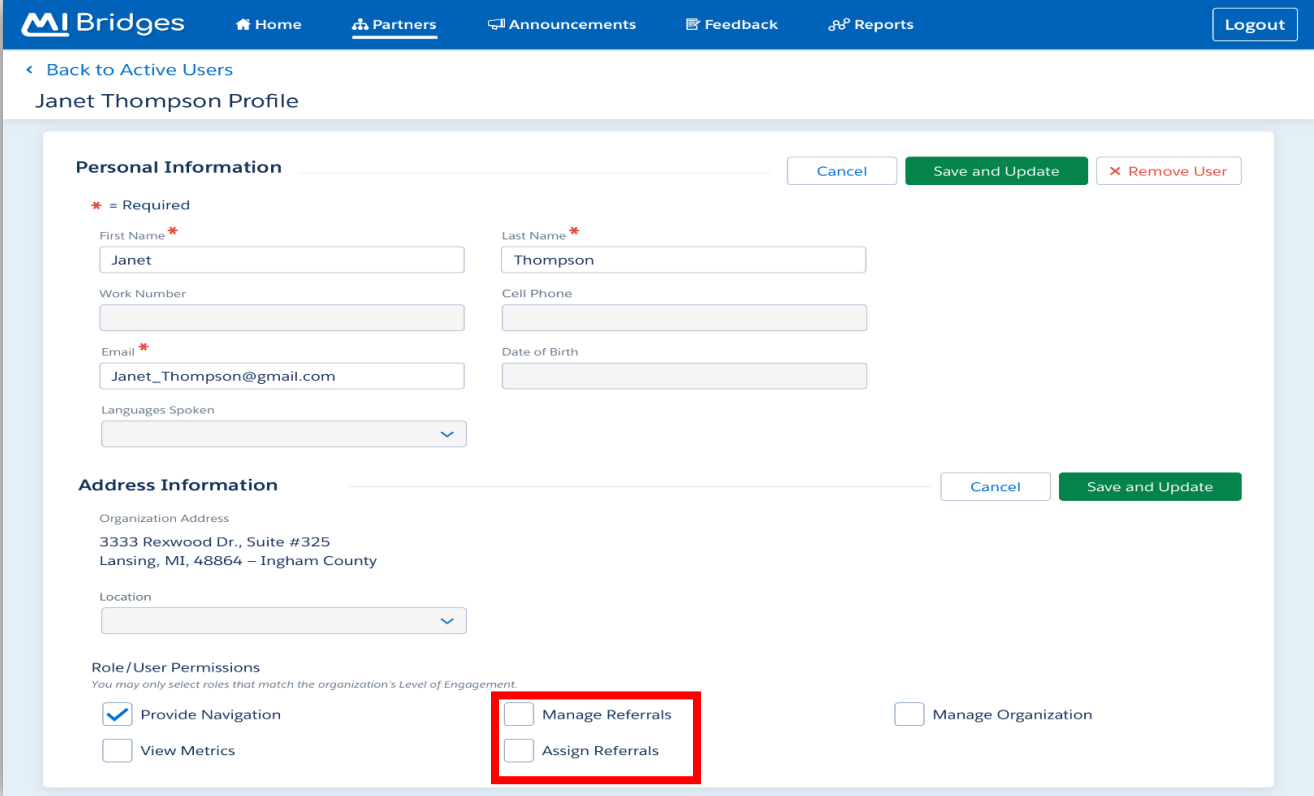
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Assign and Manage Referral Permission

The Lead Point of Contact (LPOC) or users with the *Manage Organization* permission will need to determine which users within their organization should have the *Assign Referral*

permission. A user with Assign Referral permission can view all new unassigned and currently assigned referrals. To change a user's permission level, follow these steps:

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



MI Bridges Home Partners Announcements Feedback Reports Logout

< Back to Active Users
Janet Thompson Profile

Personal Information Cancel Save and Update Remove User

* = Required

First Name * Last Name *

Work Number Cell Phone

Email * Date of Birth

Languages Spoken

Address Information Cancel Save and Update


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

Location

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

Provide Navigation Manage Referrals Manage Organization

View Metrics Assign Referrals



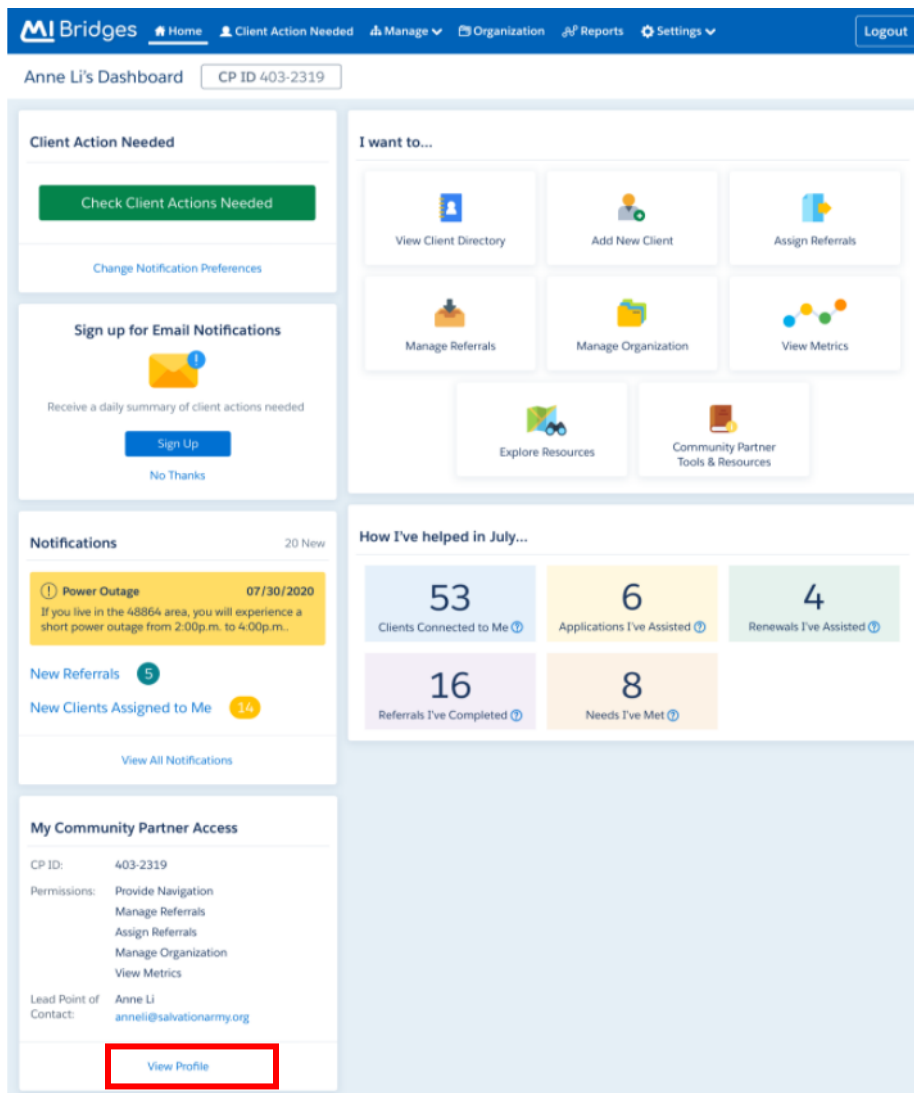
TIP: At least one user in your organization needs to have the *Assign Referrals* permission level as this is the only way for new and unassigned referrals to be seen. The LPOC will have this permission level automatically assigned to them. At least one user will need the *Manage Referral* permission, this is required to be able to take action on the referral. Organizations are not limited to how many users can have these permission levels and it might be especially helpful to organizations that have multiple locations to have multiple users with these permissions.

Sign Up for Referral Notifications

Users can sign up for notifications. These emails serve as a prompt to log into MI Bridges to work on MI Bridges Referrals. There are two different notification types:

- For users with **assign referral permission**: when a new referral is sent to the organization, an email will be sent to notify that a referral needs to be assigned to a user.
- For users with **manage referral permission**: when a new referral has been assigned to a user, an email will be sent to that user to take action on the referral.

1. To sign up for notifications, click on **[View Profile]**. You can also click on **[Settings]** to navigate to the profile page.



2. Your profile page displays. Click on the third [Edit] for Notifications Preferences. Select to receive daily email notifications for New Referrals to Assign and/or New Referrals to Manage.

MI Bridges Home Client Action Needed Manage Settings Logout

Janet Thompson's Profile

Personal Information CP ID 4035 [Edit](#)

| | |
|--|---|
| First Name Janet | Last Name Thompson |
| Date of Birth 08/13/1983 | Languages Spoken English Spanish |
| Work Number 517-555-1231 | Cell Phone 517-555-1231 |
| Email Janet_Thompson@gmail.com | |

Organization Information [Edit](#)

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

Location
Tim's Food Pantry - 235 Main St., Lansing MI

Notification Preferences [Edit](#)

Sign Up for Email Notifications
Janet_Thompson@gmail.com

| Notification Type | Email |
|-----------------------------|--------------------------|
| New Referral(s) to Assign ? | <input type="checkbox"/> |
| New Referral(s) to Manage ? | <input type="checkbox"/> |
| Urgent Need Updates ? | <input type="checkbox"/> |

Update Password and Security Questions

You can change your password or security questions through MiLogin. Your password and security questions will be updated for any State of Michigan account.

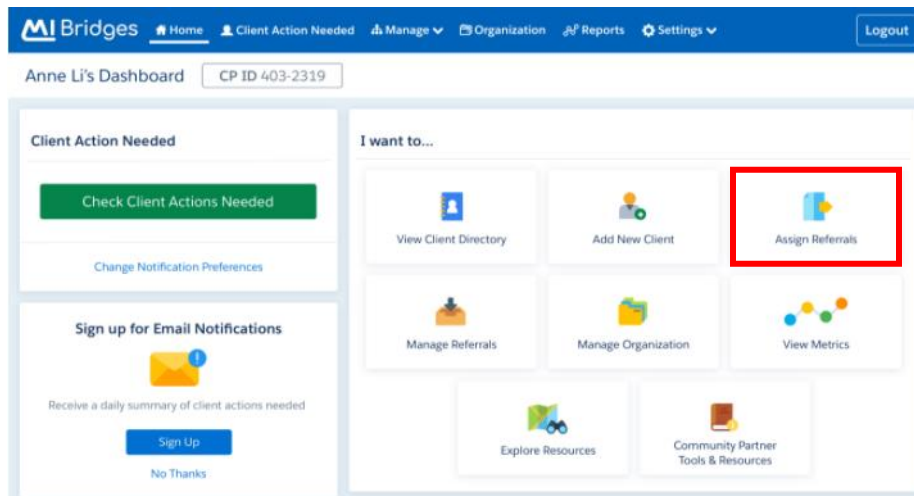
[Change Password](#) [Change Security Questions](#)

Date Joined: 01/23/2016 Date Trained: 01/23/2016

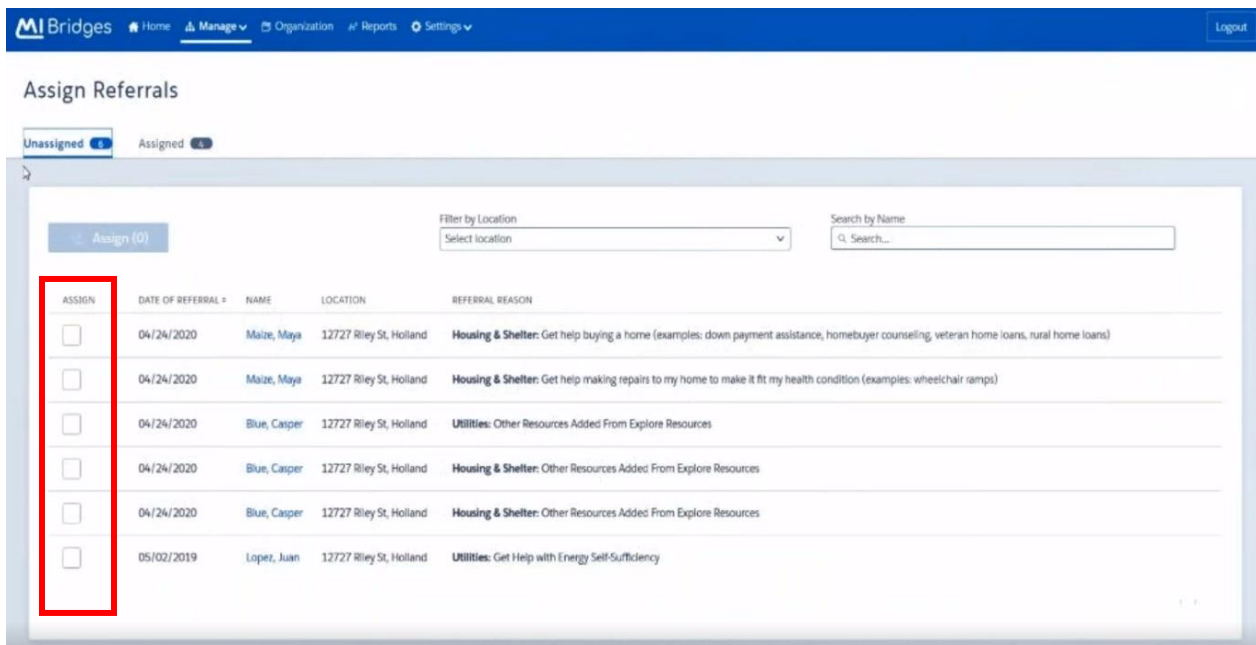
Assigning an Unassigned Referral

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

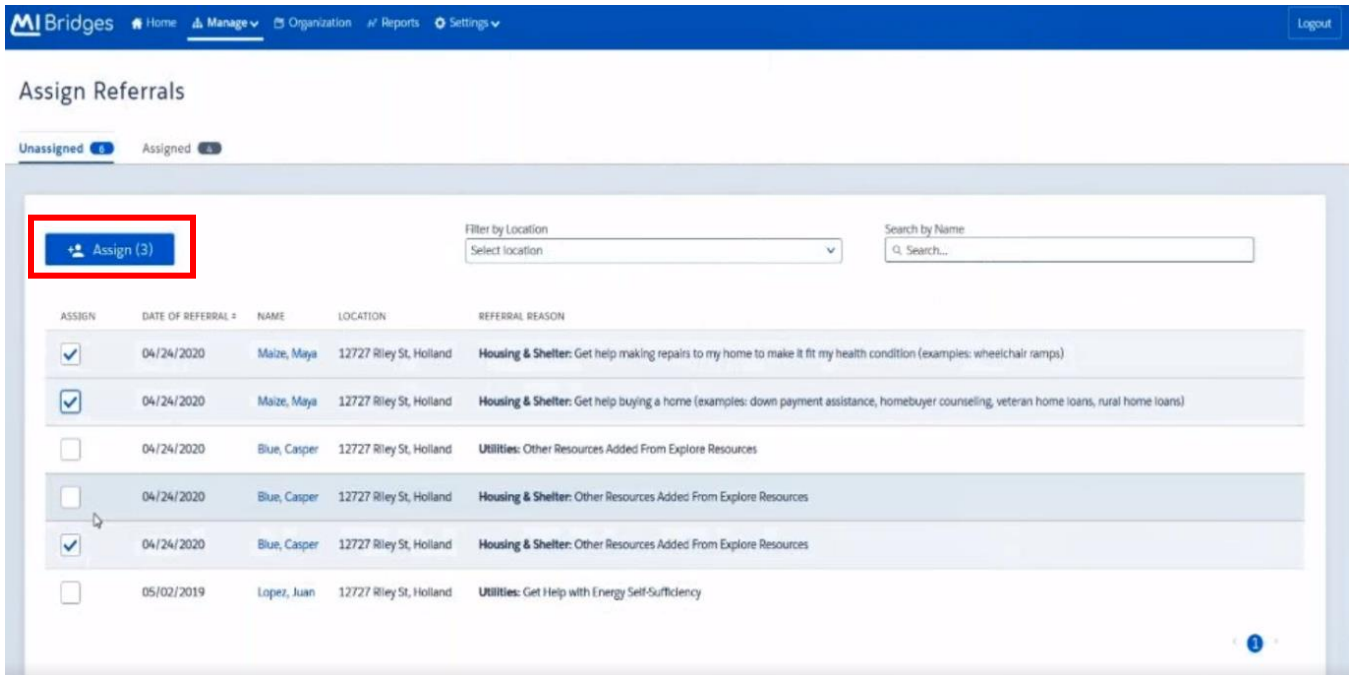
1. To assign an unassigned referral, click on **[Assign Referral]**,



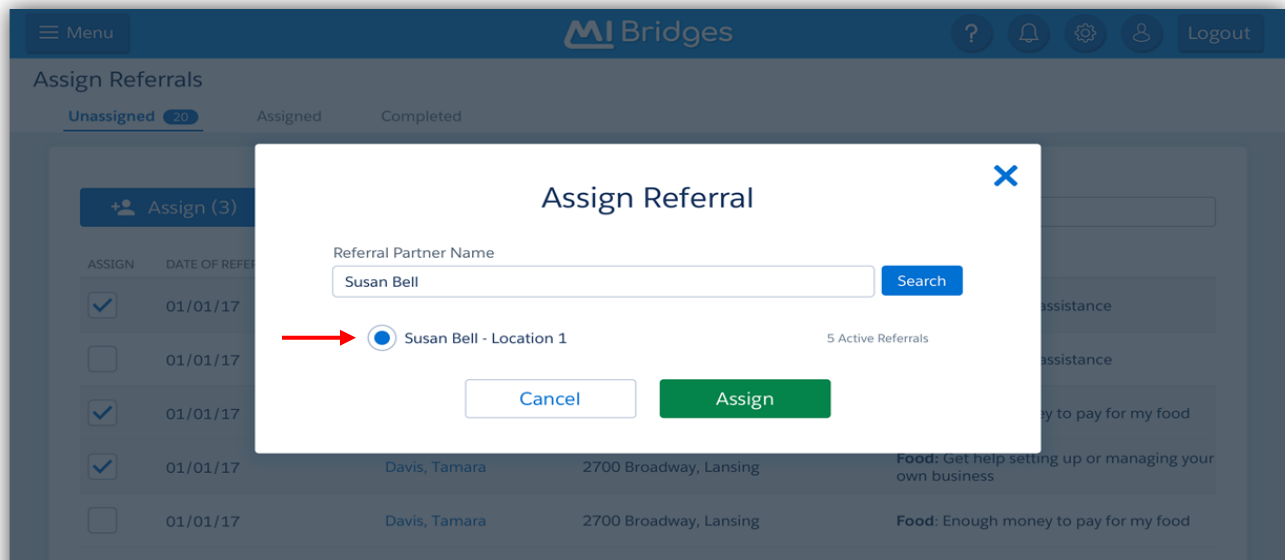
2. In the **[Unassigned]** referral directory on the left-hand side check the box for each referral you wish to assign.



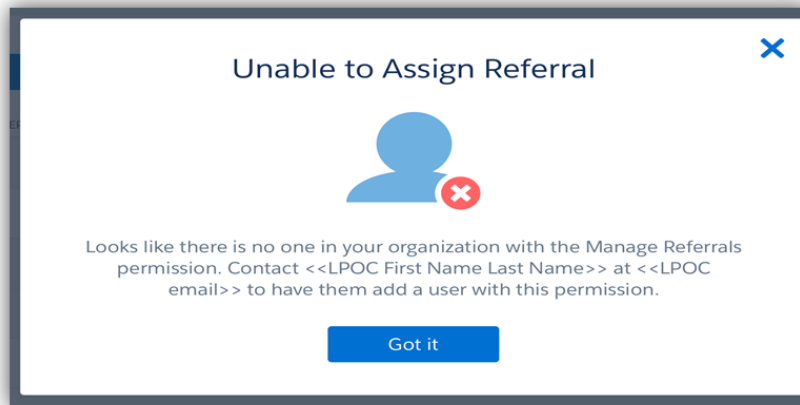
3. Once you have checked the referral(s), click on the **[Assign]** button.



- 4. A pop-up window will appear with a search box. Enter the name of the user you wish to assign the referral(s) to and click **[Search]**.
- 5. Select the name that appears and click **[Assign]**.



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



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

Referral Review Page

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

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



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

The screenshot shows the MI Bridges interface for a referral review. At the top, there is a navigation bar with 'MI Bridges', 'Home', 'Manage', 'Organization', 'Reports', and 'Settings'. A 'Logout' button is in the top right. Below the navigation bar, there is a breadcrumb trail '< Back to Assign Referrals' and an 'Add to Client Directory' button. The main content area is titled 'Windy Day' and contains several sections:

- Referral Reason:** A table with columns: Referral Date (03/25/2019), Topic (Utilities), Need (Get Help with Energy Self-Sufficiency), Referral Status (In Progress), and Assigned To (Jason Uat). A red box highlights the 'Assigned To' field, which includes a 'Reassign Referral' link.
- Contact Info:** A table with columns: Cell Number (517-582-9892), Home Number, Email (windiy@mailinator.com), and Preferred Language.
- Resources:** A grid of resource categories with counts: Food (25), Housing & Shelter (49), Utilities (29), Healthcare (124), Income & Employment (43), Transportation (10), Clothing & Household Goods (19), Child Care (19), Education (50), and Legal (12). A 'View All' link is next to the Resources header.
- Find and share resources directly with Windy:** A red box highlights this section, which includes 'Explore Resources' and 'Help Me Find Resources' buttons.
- Referral History:** A red box highlights a list item: 'Assigned to Jason Uat by Anner Uat on 01/24/2020.'
- Notes:** A section with the text 'This space is provided for your own use. Type in any thoughts or reminders that are relevant.' and a text input area.

Completing a Referral

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

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

Referral Feedback

Tamara Davis
Food: Get Help with Finding Healthy Food

Were you able to address the need?
 Yes No

Reasoning:

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

Client did not want to proceed

Did you forward this client to another agency?
 Yes No

Please enter organization's name...

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

Cancel Submit

Referral Partner Management

As an organization, there may be times when you have determined that you are at capacity of new referrals received through MI Bridges and need to focus only on the current referrals. In these instances, you can send an email to MDHHSCommunityPartners@michigan.gov to temporarily turn off referrals. When emailing with this request, please provide the date you want the referrals turned off and the date you want the referrals turned back on.

Community Partner Resources

Questions on MI Bridges and Community Partnership

MI Bridges Community Partner Liaison
MDHHSCommunityPartners@michigan.gov

MI Bridges Community Partner Website
www.Michigan.gov/MIbridgesPartners

MI Bridges
https://newmibridges.michigan.gov/s/isd-prelogin-help?language=en_US

MI Bridges Help Desk
(844) 799-9876