



IMMIGRATION & REFUGEE INFORMATION SYSTEM



IRIS

Affiliate Supervisor Users' Guide

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Introduction

Those users who are set up in IRIS as “**Affiliate Supervisors**” have the ability to perform certain functions. The purpose of this guide is to identify and describe these functions, and to provide supervisor users the information they need to perform the functions.

Affiliate Supervisor Functions

The two main types of Affiliate user in IRIS are “**Case Worker**” (with or without ability to view Medical Information) and “**Supervisor**”. What is the difference between these two types of users? Basically, a user with supervisor designation has several additional capabilities in IRIS.

This is most easily shown by comparing the options on the Dashboard navigation bar for a Case Worker user with those for a Supervisor user:

Case Worker User	Supervisor User
Pre Case Processing <ul style="list-style-type: none">Advanced SearchAdd AORAdd Interest File	Pre Case Processing <ul style="list-style-type: none">Advanced SearchAdd AORAdd Interest File
Case Management <ul style="list-style-type: none">Advanced SearchAdd Non-Refugee CaseReconciliation Report	Case Management <ul style="list-style-type: none">Advanced SearchAdd Non-Refugee CaseCase ReturnReconcile Arrivals
Administration <ul style="list-style-type: none">Forms	Administration <ul style="list-style-type: none">User MaintenanceCo-Sponsor ListAffiliate Contact DataProgram ListForms
MG Reports <ul style="list-style-type: none">MG1 Enrollment ReportProgress Report	
Reports <ul style="list-style-type: none">Print Reports	Reports <ul style="list-style-type: none">Print Reports

Notice that the Supervisor user has the following additional links:

- | | | |
|-----------------|---|------------------------|
| Case Management | → | Case Return |
| Administration | → | User Maintenance |
| Administration | → | Co-Sponsor List |
| Administration | → | Affiliate Contact List |
| Administration | → | Program List |

These are the functions that this Supervisor User's Guide will cover.

Case Management / Case Return

When a VOLAG places a case with an affiliate agency, one of the first activities to take place on that case is for the agency to **Assure** an anchor sponsor and/or a co-sponsor, and to **make arrangements** for arrival of the case.

There may be times when an affiliate cannot work with a case. For example:

- For a Predestined or Geo case:
 - if an anchor cannot be located, or
 - if an anchor is known to have moved out of the agency's area of service
- For a Free case:
 - if there are special/medical conditions that the agency does not have the capacity to handle, or
 - if the special housing needs of a case member cannot be accommodated

In these situations, the affiliate agency should **always first consult** with the **VOLAG case processing staff**. The VOLAG will follow-up with the Refugee Processing Center (RPC) if needed and determine if the case can be converted from a Predestined or Geo case to a Free case, or if it needs to be transferred to another network affiliate or to another VOLAG.

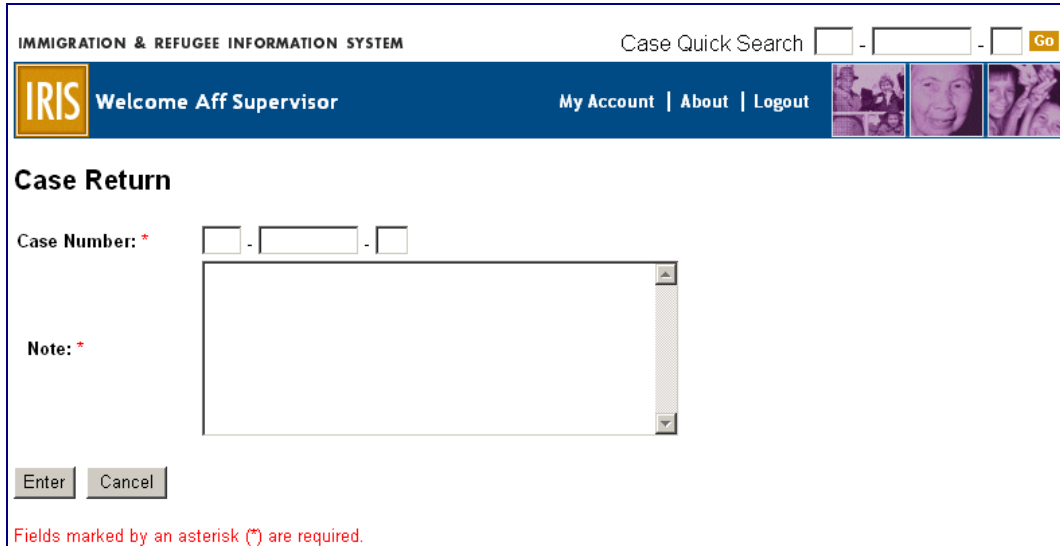
If the case is to be placed somewhere else, the VOLAG will request that the affiliate send the case back to them using the **Case Return** function in IRIS.

When a case is returned, it will be removed from the affiliate agency's roster of cases and can then be placed with a different affiliate or **transferred** to a different VOLAG.

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Returning a Case is a simple process. From the Dashboard, click the **Case Return** link under “**Case Management**” section on the left navigation bar.

The following screen will be displayed.



IMMIGRATION & REFUGEE INFORMATION SYSTEM Case Quick Search - -

IRIS Welcome Aff Supervisor My Account | About | Logout

Case Return

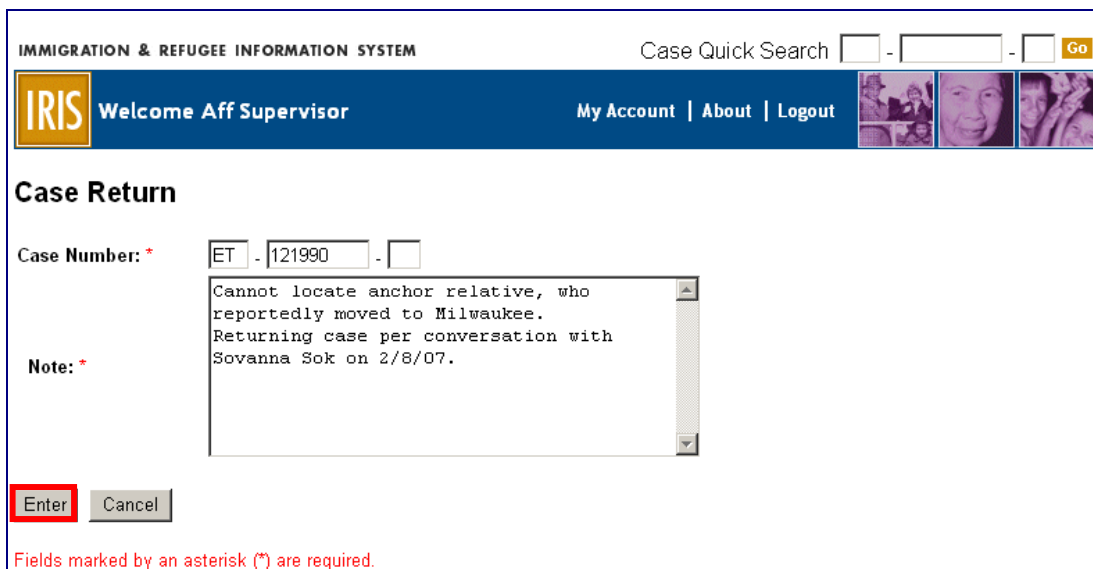
Case Number: * - -

Note: *

Fields marked by an asterisk (*) are required.

Enter the case number (**with suffix if needed**), and the **reason** for the return in the Notes field.

Note: Both fields are required.



IMMIGRATION & REFUGEE INFORMATION SYSTEM Case Quick Search - -

IRIS Welcome Aff Supervisor My Account | About | Logout

Case Return

Case Number: * ET - 121990 -

Note: * Cannot locate anchor relative, who reportedly moved to Milwaukee. Returning case per conversation with Sovanna Sok on 2/8/07.

Fields marked by an asterisk (*) are required.

Complete the Case Return by clicking on the **Enter** button. Cancel the Case Return by clicking on the **Cancel** button.

Administration / User Maintenance

Affiliate agency supervisors have the ability to **add** and **maintain** their own agency's users. The following User Maintenance topics will be covered here:

- Searching for a User
- Changing User Data
- Unlocking a User
- Inactivating (Removing) a User
- Inviting (Adding) a New User
- Troubleshooting User Issues

Searching for a User

From the Dashboard click the **User Maintenance** link under “**Administration**” section on the navigation bar.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search - -

IRIS Welcome Veronica Affiliate
LIRS My Account | About | Logout

User Search

Username:

First Name:

Last Name:

E-mail:

VOLAG or Affiliate: 05 - CO-Denver

Status: Active

Notice that the VOLAG or Affiliate dropdown field is pre-filled with your agency and that it is grayed out so that you cannot change it.

The easiest way to search is to **leave the search fields blank** and click on the **Search button**. This will return the list of all users within your **agency/office**. If you have many users, however, this may not be practical.

To search for a particular user name, enter the **beginning** or the **full** username and click on the **Search** button.

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For instance, if you type aff in the username field and click on Search, all user names for your agency **that contain “aff”** will be displayed.

User Search

Username:

First Name:

Last Name:

E-mail:

VOLAG or Affiliate:

Status:

Search Results Tips:

- You can see how many users were returned based on your search. In the screenshot below, 3 user were returned with “**aff**” in their username.
- Select how many results to see in the list using the “**Select**” dropdown. The default number is **20**. The dropdown choices are 10, 20, 50, 100, and ALL. In the screenshot below, this does not matter, since there are only 3 User to display.
- Use the Navigation links – First Page, Previous Page, Next Page, Last Page – to move from page to page, assuming that you get more results than can fit on a single screen.
- **Note:** The Column Headers are **links**. Clicking on them will resort the list based on the clicked column. For instance, clicking on the **Last Login** link will rearrange the list from earliest login to latest. Clicking it again reverses the order.

Search Results

Displaying 1 - 6 of 6 Result(s) (OR) Display results per page.

[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)

Username	First Name	Last Name	Email Address	Affiliate	Status	Emails Allowed?	Last Login
10	chicago	chicago	mgalgano@partners-intl.net	Interfaith Refugee & Immigration Ministries	Active	Yes	9/27/2010 9:03:05 AM
AffCase	Aff	Caseworker	wbisbee@lirs.org	Interfaith Refugee & Immigration Ministries	Active		2/8/2007 2:34:50 PM
AffChicago	Chicago	Chicago	mgalgano@partners-intl.net	Interfaith Refugee & Immigration Ministries	Inactive		7/17/2006 1:01:56 PM

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The same functionality exists for the other search fields: **First Name**, **Last Name**, **E-mail Address**, and **Emails Allowed?**. You can also choose to search for only users that have either an **Active** or **Inactive** Status.

Special User Type

If you see a user name that is a **number** – such as user “**10**” below, it indicates that a **user invitation** has been sent to someone, but that individual has not yet completed setting up their **IRIS user account**. Once the user has completed their user setup, the username they created will be displayed.

Search Results

Displaying 1 - 6 of 6 Result(s) (OR) Display results per page.

[\[First Page\]](#)[\[Previous Page\]](#)[\[Next Page\]](#)[\[Last Page\]](#)

Username	First Name	Last Name	Email Address	Affiliate	Status	Emails Allowed?	Last Login
10	chicago	chicago	mgalgano@partners-intl.net	Interfaith Refugee & Immigration Ministries	Active	Yes	9/27/2010 9:03:05 AM
AffCase	Aff	Caseworker	wbisbee@lirs.org	Interfaith Refugee & Immigration Ministries	Active		2/8/2007 2:34:50 PM
AffChicago	Chicago	Chicago	mgalgano@partners-intl.net	Interfaith Refugee & Immigration Ministries	Inactive		7/17/2006 1:01:56 PM

If a user is issued an **invitation** but does not complete their setup within a **week**, their link will **expire** and you will have to assist them. See the section on “**Troubleshooting User Problems**” for more information on handling situations like these.

Changing User Data

Now that you have searched for and located a user, you have the ability to view and change the user's login information. Open a user by clicking on the **user link** on the Search Results screen.

User Maintenance

Username:

First Name:

Last Name:

Email address: *

Title:

VOLAG or Affiliate: *

Status: *

Assigned Groups		Unassigned Groups
AffSup	<<	AffURM
AffCaseMgmtStaff		AffURMSup
AffCaseMgmtStaffMedical	>>	AffMGStaff

Do not send any emails to this account.

This account is locked.

Hide empty notification links on dashboard.

Last Login: 9/27/2010 9:03:05 AM

Login Attempts: 0

Fields marked by an asterisk (*) are required.

All of the fields shown on the screen except **Affiliate** are able to be changed. Supervisors **do not** have the ability to change a user's **password** or **phone number**, since users can change those themselves. Users can also change their own Email addresses, but a supervisor can change it for a user also.

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In the example below, we have changed the user's first and last name and updated their title. To do this, you just **overwrite** the values in those fields. When done, click on the **Save** button.

User Maintenance

Username: vaffiliate
First Name: Mary
Last Name: Gaigano
Email address: * wbisbee@lirs.org
Title: Case Worker
VOLAG or Affiliate: * 05 - CO-Denver
Status: * Active

Assigned Groups
AffSup
AffCaseMgmtStaff
AffCaseMgmtStaffMedical

Unassigned Groups
AffURM
AffURMSup
AffMGStaff

Do not send any emails to this account.
 This account is locked.
 Hide empty notification links on dashboard.

Last Login: 9/27/2010 9:03:05 AM
Login Attempts: 0

Save **Cancel**

Fields marked by an asterisk (*) are required.

Changing Permissions

The Assigned Groups box displays the permission(s) assigned to this user:

AffCaseMgmtStaff	affiliate case worker (with no medical data access)
AffCaseMgmtStaffMedical	affiliate case worker (with medical data access)
AffSup	affiliate supervisor
AffFinStaff	affiliate financial staff (not currently used)

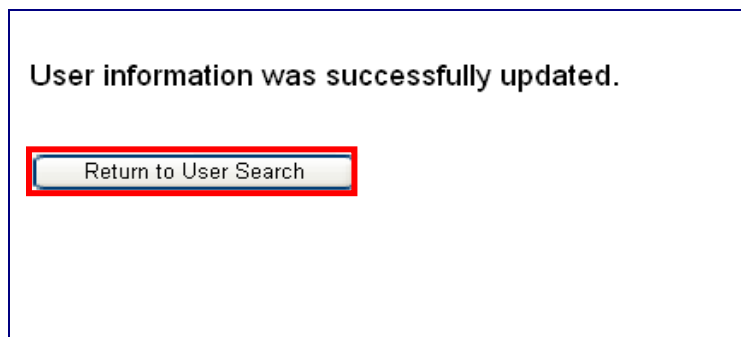
You can use the arrow buttons “<<” and “>>” to assign or removed permissions for this user. Users can have multiple permissions and they are cumulative – for instance, if you give a user both **AffCaseMgmtStaff** and **AffCaseMgmtStaffMedical**, that user will be able to view **medical data**.

Assigned Groups
AffCaseMgmtStaff

Unassigned Groups
AffSup
AffFinStaff
AffCaseMgmtStaffMedical

Save Your Changes

Once you click the **Save** button, the following screen will be displayed:

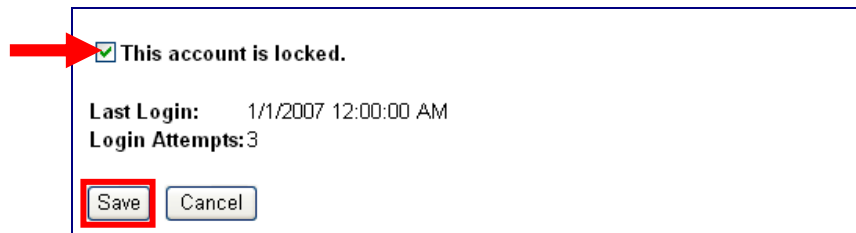


Click the "**Return to User Search**" button to continue.

Unlocking a User

A user who types in an incorrect password **three times** will find his/her account locked. The user should then receive an e-mail from the IRIS system to the e-mail address on record allowing them to unlock their account. However, the **Affiliate Supervisor** or **VOLAG administrator** has the ability to unlock a username as well.

First, search for the user and click on the link for their username. At the bottom of the user screen, you will see information about the user's **lock status**:



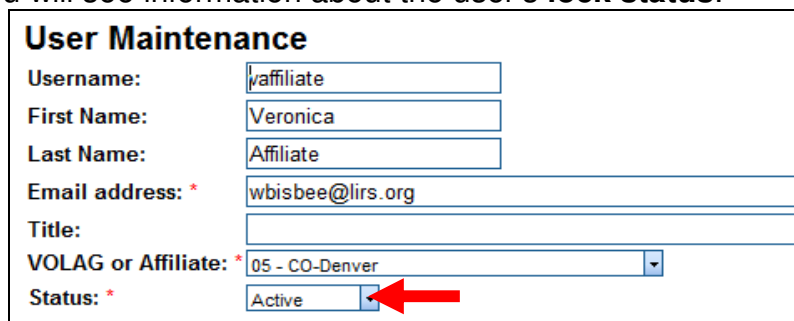
A screenshot of a web form showing user lock status. At the top, there is a checkbox labeled "This account is locked." which is currently checked. A red arrow points to this checkbox. Below the checkbox, the text "Last Login: 1/1/2007 12:00:00 AM" and "Login Attempts: 3" is displayed. At the bottom of the form, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red box.

Just uncheck the **"This account is locked"** checkbox and click the **Save** button to unlock the user account.

Inactivating (Removing) a User

Since many records in IRIS are marked with the identifier of the user who created or updated that record, you are not able to **delete users** from IRIS. When someone **leaves and/or will no longer** be accessing IRIS, you should **"Inactivate"** that user. Inactivating a user makes it so that person cannot log into the system.

First, search for the user and click on the link for their username. At the bottom of the user screen, you will see information about the user's **lock status**.



A screenshot of the "User Maintenance" form. The form contains several fields: "Username:" with the value "vaffiliate", "First Name:" with "Veronica", "Last Name:" with "Affiliate", "Email address: *" with "wbisbee@lirs.org", "Title:" (empty), "VOLAG or Affiliate: *" with a dropdown menu showing "05 - CO-Denver", and "Status: *" with a dropdown menu showing "Active". A red arrow points to the "Active" dropdown menu.

Use the **Status** dropdown to change the user from Active to Inactive. Then click the **Save** button to save the change.

Inviting (Adding) a New User

When adding a new user to IRIS, the administrator does not fully create the user, as in a traditional computer-based system. Rather, the administrator “**invites**” the user to join IRIS. This invitation is initiated by the **Affiliate Supervisor** or **VOLAG Administrator** user.

From the User Search screen, click the “**Invite User**” button to start the process.

Helpful Hint:

Since the User Search and the User Maintenance screens look very similar, it is a common mistake to start typing in a new user on the User Search screen. Be mindful of screen you are working on.

User Search

Username:

First Name:

Last Name:

E-mail:

VOLAG or Affiliate:

Status:

When you click the “**Invite User**” button, you are presented with the User Maintenance screen – this is the same screen used when changing an existing user’s data.

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All fields are available on this screen **EXCEPT** for the Username, which the user will create when s/he completes the process, and the Affiliate, which is set to your agency and cannot be changed. You must complete the required fields (**indicated with a red asterisk**) and assign at least **one group** to the user.

User Maintenance

Username:

First Name:

Last Name:

Email address: *

Title:

Affiliate: *

Status: *

You must select an Affiliate before you can assign Groups.

Assigned Groups	Unassigned Groups
<input type="text"/>	<input type="text" value="AffSup"/> <input type="text" value="AffCaseMgmtStaff"/> <input type="text" value="AffFinStaff"/> <input type="text" value="AffCaseMgmtStaffMedical"/>

This account is locked.

Last Login:
Login Attempts:

Fields marked by an asterisk (*) are required.

User Maintenance

Username:

First Name:

Last Name:

Email address: *

Title:

Affiliate: *

Status: *

You must select an Affiliate before you can assign Groups.

Assigned Groups	Unassigned Groups
<input type="text" value="AffCaseMgmtStaff"/>	<input type="text" value="AffSup"/> <input type="text" value="AffFinStaff"/> <input type="text" value="AffCaseMgmtStaffMedical"/>

This account is locked.

Last Login:
Login Attempts:

Fields marked by an asterisk (*) are required.

Once you have completed the screen, click the **Save** button. IRIS will e-mail the user an invitation message to the e-mail address you entered. The message will contain a link allowing the user to complete their setup by **creating their own user name and password**.

Troubleshooting User Issues

The following sections contain issues that you may be called upon to address:

Expired User Invitation

When a User Invitation is sent, the recipient has **7 days** to complete setting up their user account. After the 7th day, the **link expires**. IRIS currently has no way of resending an expired link, so the partially set up user account will appear on your **user list**, even if you send a new Invitation.

The best way to get around this, is to perform a **User Search**, looking for the **incomplete user accounts**. This will be indicated with a numerical username and the e-mail address of the user. Once you access that account, set the username to something the user desires and then **Save** the change.

Then, go to the IRIS log in screen and click on the **“Forgot Password”** link. When the system prompts you for a username, enter the one you just created. This will send a link to the user allowing them to set their own password.

Inability to log in

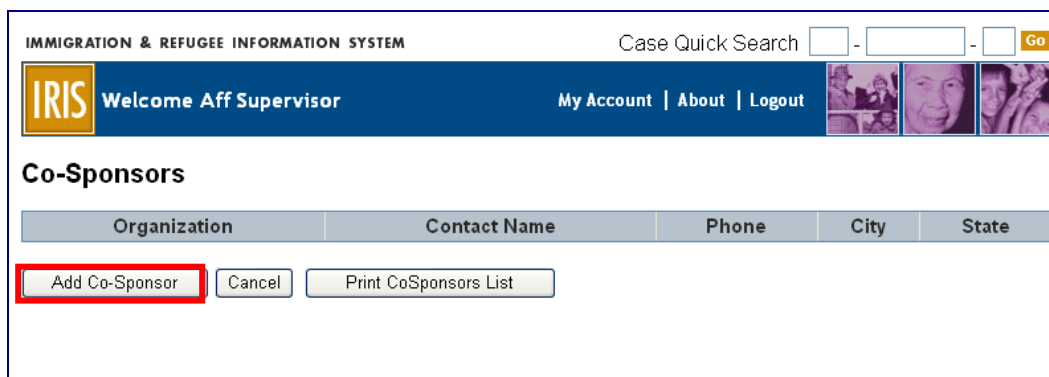
The most important thing to remember with IRIS logins is that **BOTH** the **username** and the **password** are **case sensitive**.

If the username is known, it is easy for the user to request a **link to reset** his/her password. However, there may be times when your intervention is needed. This is typically when the user either **forgets** or **cannot** use his/her username. Perform a User Search for this user and confirm the spelling and the upper/lower case pattern with the user, to ensure that they know exactly how the username is registered in IRIS. This may resolve the problem. If not, the user can then utilize the **“Forgot Password”** functionality.

Administration / Co-Sponsor List

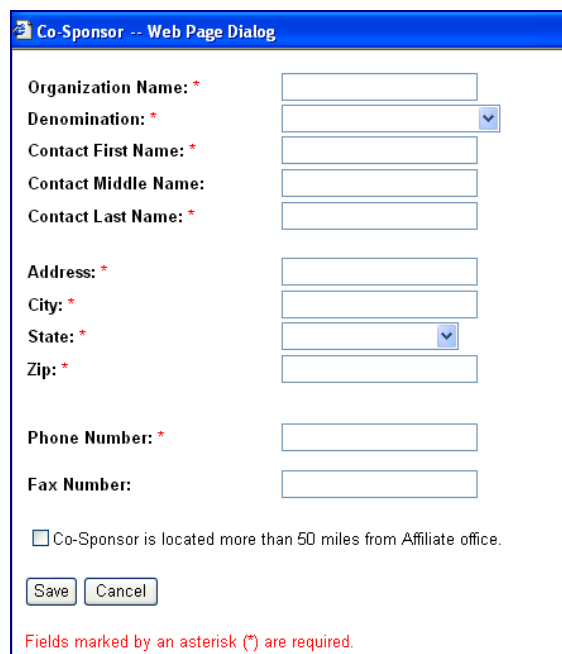
Co-Sponsors are the organizations or individuals who have agreed to sponsor cases, either **instead** of or **in addition** to anchor relatives. Co-Sponsors can be set up in IRIS once, and then used within a case many times. All co-sponsors are available on the **co-sponsor** dropdown when **assuring** a case.

To manage your agency's co-sponsors, click on the **"Co-Sponsor List"** link from the Dashboard. The first time you open the Co-Sponsors screen, you will see the following:



The screenshot shows the IRIS web interface. At the top, it says "IMMIGRATION & REFUGEE INFORMATION SYSTEM" and "Case Quick Search" with input fields and a "Go" button. Below that is a blue navigation bar with the IRIS logo, "Welcome Aff Supervisor", and links for "My Account", "About", and "Logout". There are also three small profile pictures. The main content area is titled "Co-Sponsors" and contains a table with columns: "Organization", "Contact Name", "Phone", "City", and "State". Below the table are three buttons: "Add Co-Sponsor" (highlighted with a red box), "Cancel", and "Print CoSponsors List".

Click the **"Add Co-Sponsor"** button to add a new co-sponsor to the system. A pop-up window will appear for you to complete.



The screenshot shows a "Co-Sponsor -- Web Page Dialog" window. It contains the following fields and options:

- Organization Name: * (text input)
- Denomination: * (dropdown menu)
- Contact First Name: * (text input)
- Contact Middle Name: (text input)
- Contact Last Name: * (text input)
- Address: * (text input)
- City: * (text input)
- State: * (dropdown menu)
- Zip: * (text input)
- Phone Number: * (text input)
- Fax Number: (text input)
- Co-Sponsor is located more than 50 miles from Affiliate office.
- Save (button) Cancel (button)

Fields marked by an asterisk (*) are required.

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Co-Sponsor -- Web Page Dialog

Organization Name: * St. Andrews Lutheran ChL
Denomination: * Lutheran Church
Contact First Name: * Elliot
Contact Middle Name:
Contact Last Name: * Sieffert
Address: * 5915 25th Avenue South
City: * Chicago
State: * Illinois
Zip: * 33333
Phone Number: * 333-230-2700
Fax Number:
 Co-Sponsor is located more than 50 miles from Affiliate office.
Save Cancel
Fields marked by an asterisk (*) are required.

Click the **Save** button to complete the process and return to the Co-Sponsors screen.

IMMIGRATION & REFUGEE INFORMATION SYSTEM Case Quick Search [] - [] - [] Go

IRIS Welcome Aff Supervisor My Account | About | Logout

Co-Sponsors


Organization	Contact Name	Phone	City	State
St. Andrews Lutheran Church	Elliot Sieffert	333-230-2700	Chicago	IL

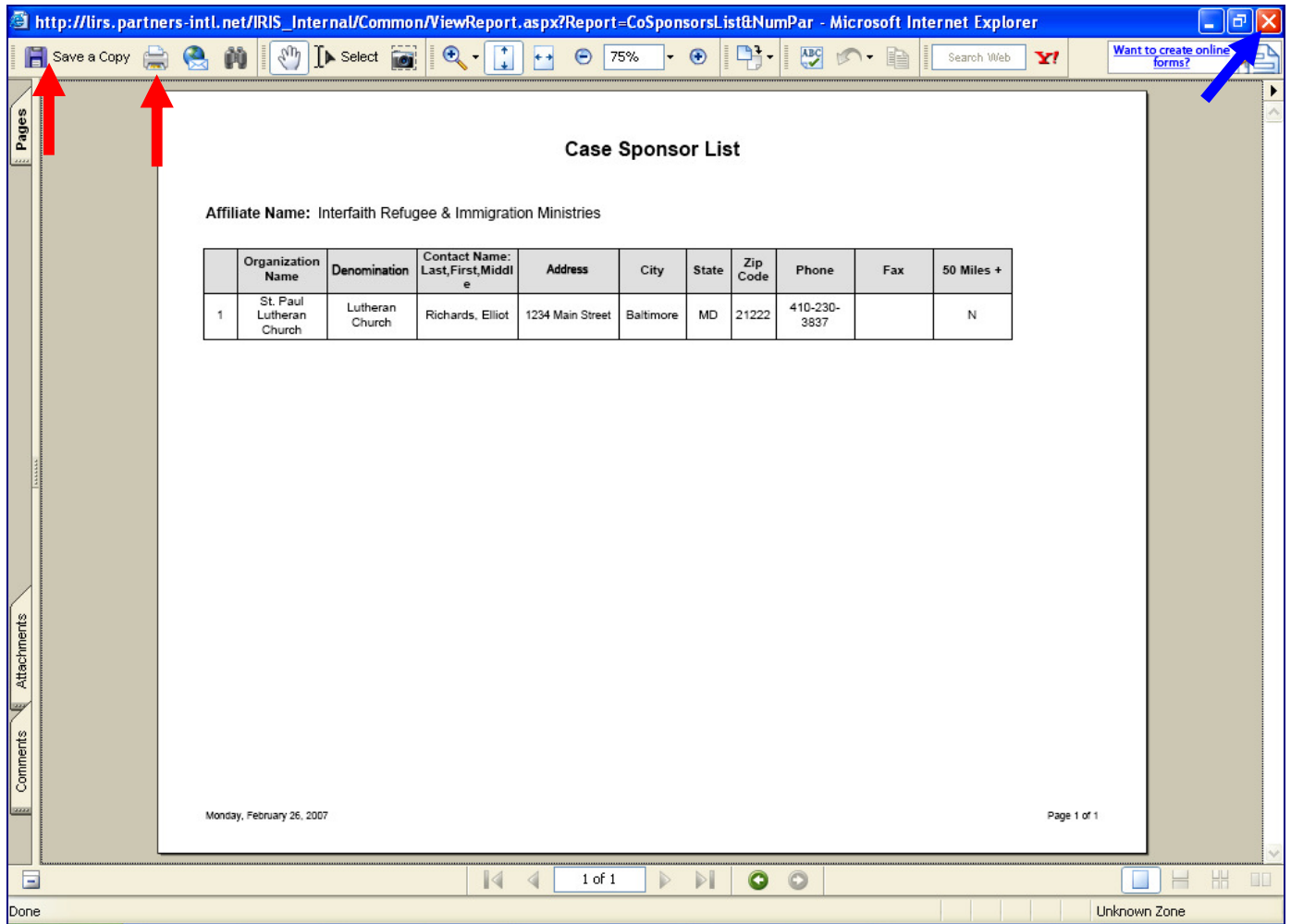
Add Co-Sponsor Cancel **Print CoSponsors List**

Note: The new co-sponsor now appears on the list.

To **edit** an existing co-sponsor, click on **link** for the organization you wish to edit. The same data screen pop-up will be displayed.

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To **print** a list of your co-sponsors, click the “**Print Co-Sponsors**” button. A report will be displayed on the screen. You then have the option of printing or saving the report. To close the screen, click the  in the upper right corner.



http://lirs.partners-intl.net/IRIS_Internal/Common/ViewReport.aspx?Report=CoSponsorsList&NumPar - Microsoft Internet Explorer

Save a Copy Print

Want to create online forms?

Case Sponsor List

Affiliate Name: Interfaith Refugee & Immigration Ministries

	Organization Name	Denomination	Contact Name: Last,First,Middle	Address	City	State	Zip Code	Phone	Fax	50 Miles +
1	St. Paul Lutheran Church	Lutheran Church	Richards, Elliot	1234 Main Street	Baltimore	MD	21222	410-230-3837		N

Monday, February 26, 2007

Page 1 of 1

Done Unknown Zone

Administration / Affiliate Contact Data

Reports or **forms** that are customized for your agency use the information on the **Affiliate Contact List**. The Affidavit of Relationship (AOR) is an example of this. As an Affiliate Supervisor, you have the ability to edit the information for your agency.

From the Dashboard, click on the **Affiliate Contact Data** link. The following screen will be displayed:

The screenshot shows the IRIS web interface. At the top, it says "IMMIGRATION & REFUGEE INFORMATION SYSTEM" and "Case Quick Search" with input fields and a "Go" button. Below this is a blue navigation bar with the IRIS logo, "Welcome Aff Supervisor", and links for "My Account", "About", and "Logout". There are also three small profile pictures. The main content area is titled "Affiliate Contact Data" and shows details for "Interfaith Refugee & Immigration Ministries" with ID "ILLIRS01". The form contains the following fields:

Contact Name: *	Mr. Greg Wangerin
Address 1: *	4753 North Broadway, Ste 401
Address 2:	
City: *	Chicago
State: *	Illinois
Postal Code: *	60640
Phone: *	773-989-5647
Fax: *	773-989-0484
Email:	nkodali@partners-intl.net
After Hours Contact: *	
Phone 1:	
Phone 2:	

At the bottom of the form are "Save" and "Cancel" buttons. A red note at the very bottom states: "Fields marked by an asterisk (*) are required."

Edit the information by **completing** or **overwriting** the desired fields.

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IRIS Welcome Aff Supervisor My Account | About | Logout

Affiliate Contact Data

Interfaith Refugee & Immigration Ministries
ILLIRS01

Contact Name: * Mr. Greg Wangerin
Address 1: * 4753 North Broadway
Address 2: Suite 401
City: * Chicago
State: * Illinois
Postal Code: * 60640
Phone: * 773-989-5647
Fax: * 773-989-0484
Email: gwangerin@irim.org
After Hours Contact: * Aff Supervisor
Phone 1: 410-230-2896
Phone 2:

Fields marked by an asterisk (*) are required.

When finished, click the **Save** button to save the changes

Note: The name of the Affiliate agency is shown at the top of the screen but cannot be edited. Changes to agencies names are made by the **VOLAG administrator**.

Administration / Program List

The Program List is the list of any programs other than R&P or Matching Grant that your agency offers to refugees or asylees. Once you **add** your programs using the Program List administrative function, then IRIS cases can then be associated with them.

Access the Program List from the Dashboard by clicking on the link. The following screen will be displayed:

IMMIGRATION & REFUGEE INFORMATION SYSTEM Case Quick Search [] - [] - [] Go

IRIS Welcome Aff Supervisor My Account | About | Logout

Programs

Program	Date Added	Added By
Wilson/Fish	2/23/2007	Chicago Chicago

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Note: A **Wilson/Fish** program was added on 2/23/07. To add a new program, click on the "Add Program" button. The following pop-up window will be displayed:

The screenshot shows a web browser dialog box titled "Program -- Web Page Dialog". It contains three input fields, each with an asterisk indicating it is required: "Name: *", "Abbreviation: *", and "Description: *". The "Description" field is a larger text area. Below the fields are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular box. At the bottom of the dialog, there is a red text message: "Fields marked by an asterisk (*) are required." The status bar at the bottom of the browser window shows the URL "http://lrs.partners-intl.net/IRIS_Internal/Admin/admin_dialog.aspx" and "Internet".

There are only three fields and they are all required. The Name is what will appear within the Program tab of a Case. The Abbreviation will appear in the case header, so it should not be more than 2-5 characters long. The description is there to provide additional details.

Click the **Save** button to save your changes.