IRIS Post Arrival Admin's Guide

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Objective

This document outlines steps on how an IRIS Administrator can add or manage Programs, Services, and associated Service Tasks.

Pre-Requisite

1. Access to the IRIS application.
2. Appropriate permissions to access the main dashboard page.

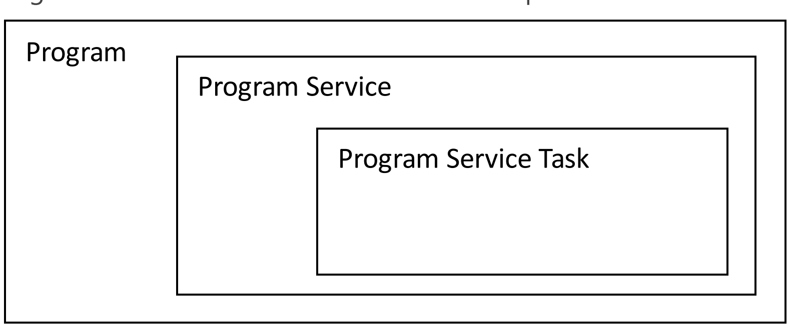
Contents

1. Introduction

In the context of IRIS application, a **Program** is a structured initiative designed to assist refugees in their transition, containing various services and support. RAs create and enroll refugee cases into these programs. **Program Services**, on the other hand, represent specific activities within a program aimed at achieving its objectives, such as healthcare assistance or educational support. RAs can add program services tailored to their requirements.

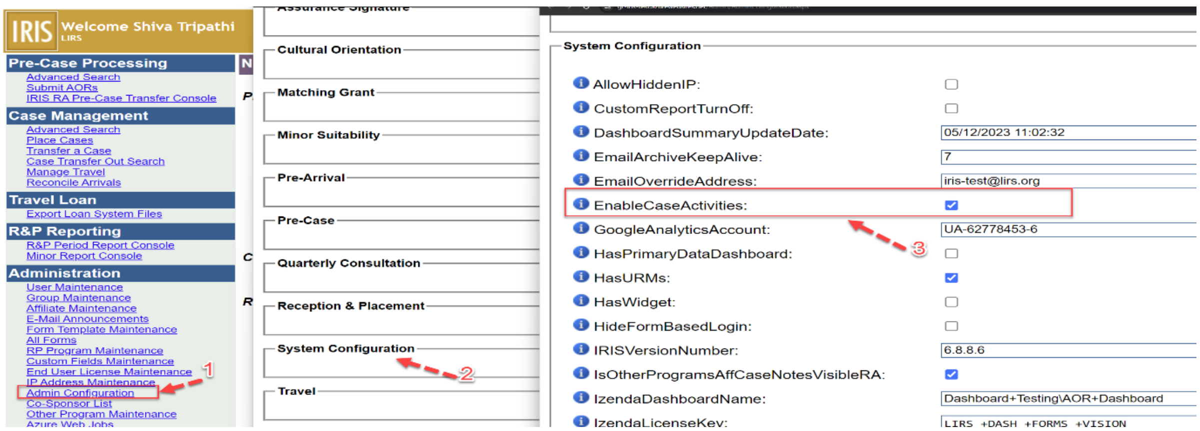
Program Service Tasks are the specific actions defined within these services, contributing to the overall program goals. For example, within a healthcare assistance program service, tasks may include medical check-ups or counseling sessions. These tasks are the individual steps taken to deliver the services outlined in the program.

A high-level visual definition of these three important initiatives.



2. Activating/Deactivating Program Service and Service Task Functionality

1. Begin by ensuring successful login into IRIS.
2. Navigate to the IRIS Dashboard.
3. On the Main page, navigate to **Administration >Admin Configuration > System Configuration, and locate the variable "EnableCaseActivities".**
4. Check/Uncheck the **"EnableCaseActivities"** variable to enable Program Service and Service Task functionality.
5. Click on the '**Save'** button to save the configuration changes.

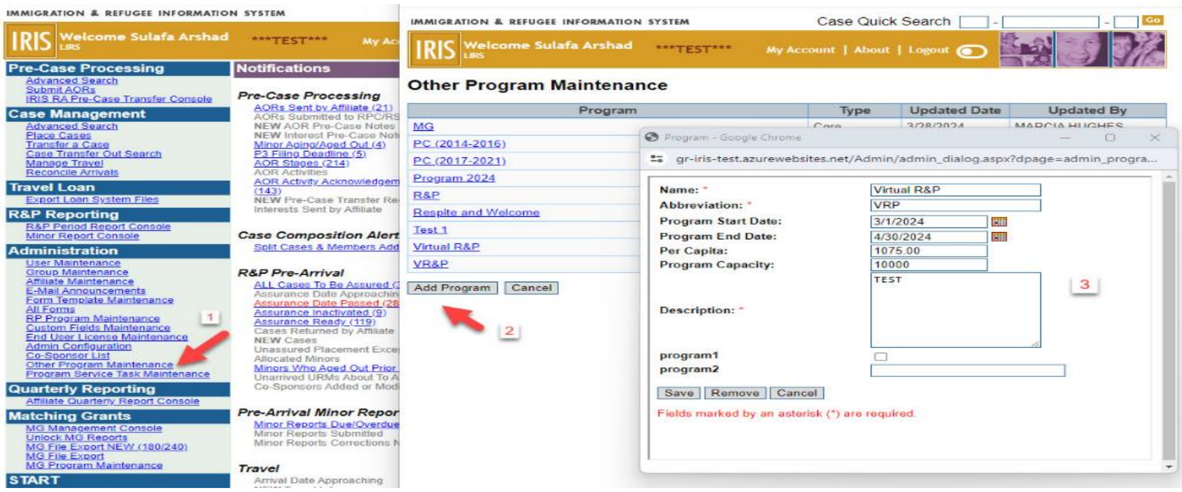


3. Create/Edit a Program

A **Program** refers to a structured initiative or set of activities designed to assist refugees in their transition to a new country and community. Refugee resettlement programs may encompass a wide range of services and support. In IRIS, RAs are able to create a Program with related details and enroll refugee cases into eligible programs. Following steps can be used to create/edit a Program:

1. To create a Program, under the **"Administration"** section, locate and click on the **"Other Program Maintenance"** option.
2. Click on the **"Add Program"** button.
3. Upon selection, a new screen will appear, prompting the user to input all necessary information.
   a. **Name:** Assign a name to the Program. For example, in screenshot below, the program is named as 'Virtual R&P'. User can name the new program with a name of their choosing.
   b. **Abbreviation:** User defined acronym for the program like the one shown in screenshot.
   c. **Program Start and End Dates:** Start date for the program can be case arrival date. End date can range between 30 days to 90 days depending on the type of program.
   d. **Per Capita:** This is allocated amount for each household member.
   e. **Program Capacity**: The program capacity is the total amount allocated for that family and is available for a defined period of time.
   f. **Description** - A brief description about the program.
   g. Click **Save** and new program will be created.

***(Note:** Once you've made your selections, click "Save." Information will not be saved until you've clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)*

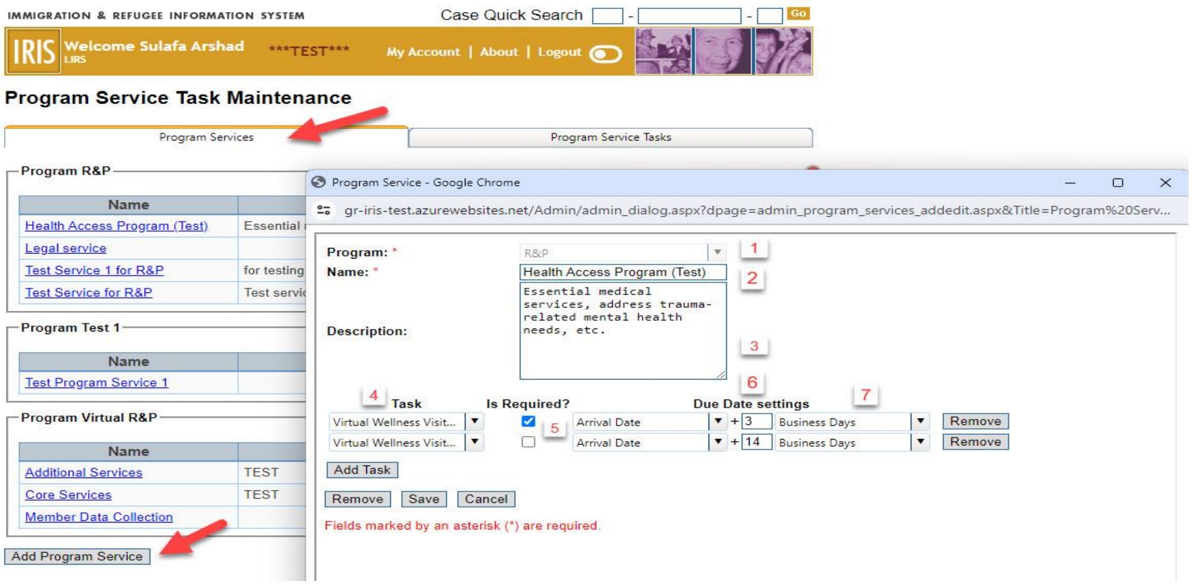


4. Add Program Service

A **Program Service** refers to a specific activity or set of activities provided by an organization to achieve its goals or objectives within a particular program. It's a term often used in the context of non-profit organizations or social service agencies to describe the core services or interventions they offer to their target beneficiaries. These services can vary widely depending on the organization's mission and the needs of the community they serve. Examples of program services include healthcare assistance, educational support, job training, counseling, and housing assistance. In IRIS, RAs have the ability to add program services that meets their requirements. Following are the listed steps that can help RA(s) to add program service:

1. To add a Program Service, on the IRIS Dashboard main page navigate to **Program Service Task Maintenance> Program Service tab.**
2. Click on the "**Add Program Service"** button. A new window will appear.
   a. **Program**: Select the Program name from the drop-down menu. As example in the screenshot, R&P is selected as Program.
   b. **Name:** Name of the service, example "Health Access Program".
   c. **Description:** Provide a short overview of the service, outlining the main purpose and related elements.
   d. **Tasks dropdown:** Select the task from the drop-down. Example as shown in the screenshot.
   e. **Is Required**: Check the box if the task has to be a mandatory requirement.
   f. **Due Date Settings:** Choose the input date for the service from the date dropdown menu, and select the calculation type from the list, which includes options such as Arrival Date or Intake date.
   g. Plus add the specified number of days (Business/Calendar Days) to define estimated time period it may take for the completion of chosen task.
   h. Click on the **"Add Task"** button to add more tasks as needed.
   i. Finally, click on **"Save"**.

***(Note:** Once you've made your selections, click "Save." Information will not be saved until you've clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)*

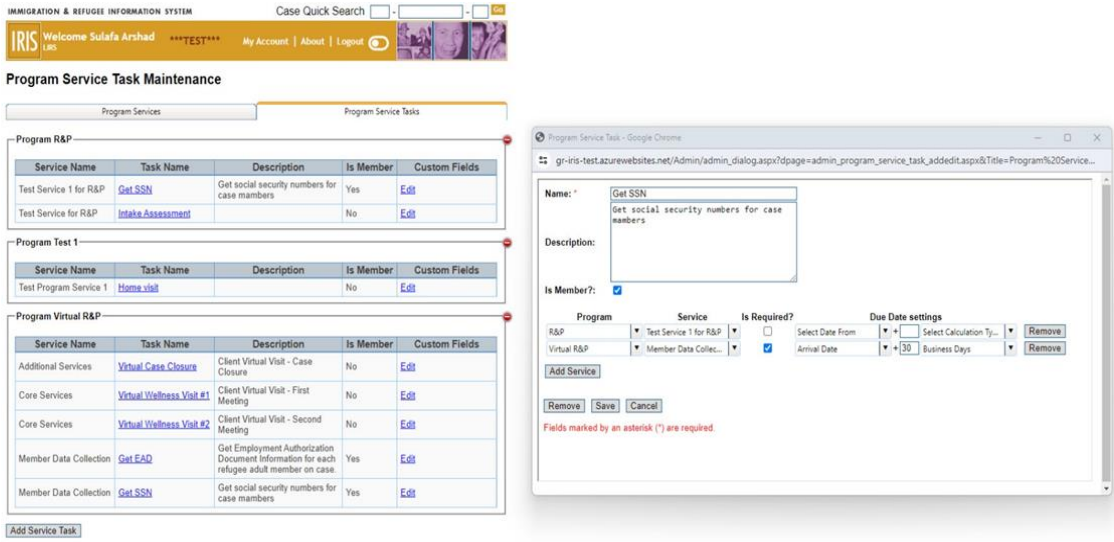


5. Add Program Service Tasks

A **Program Service Task** refers to a specific action, or an activity defined within the parameters of a selected Program Service. It's a particular task or responsibility that contributes to the overall goal of the Program. For instance, in a healthcare assistance Program Service, the Program Service Tasks might include actions such as providing medical check-ups, giving vaccinations, or offering counseling sessions. These tasks are the individual actions carried out to deliver the services outlined in the program. The following steps assist RA(s) in adding Service Tasks:

1. To add service Tasks not available in the Program Tasks list, navigate to **"Program Service Tasks"** tab and click on the **"Add Service Task"** button.
2. Upon selection, a new screen will appear, prompting the user to input all necessary information.
   a. **Name:** List the service tasks name, for example, 'Get SSN'.
   b. **Description:** Brief description of the task. In this example, task is to obtain SSN for all the case members.
   c. **Is Member:** Tasks can be created on a member level as well as on case level. For example, SSN information can be collected on individual level for each member of the case. Check the box if it is an individual member level task. While a case-level task is typically seen as having a broader impact, such as obtaining SSN for the entire family, then this box can be left un-checked.
   d. **Program:** Associate this service task to a program by selecting one from the drop-down list.
   e. **Service:** Select Service name from drop down list and check the box if its mandatory or not.
   f. **Due Date Settings:** Choose the input date for the service from the date dropdown menu, and select the calculation type from the list, which includes options such as Arrival Date or Intake date.
   g. Plus add the specified number of days (Business/Calendar Days) to define estimated time period it may take for the completion of chosen task.
   h. Click on the "**Add Service**" button to add more tasks as needed.
   i. Finally, click on "**Save**".

***(Note:** Once you've made your selections, click "Save." Information will not be saved until you've clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)*



5.1. Add Custom Fields

Adding custom fields to a service task serves to enhance its flexibility and adaptability by enabling the capture of task-specific information. This customization allows users to tailor the interface to accommodate unique requirements, additional details or specialized data points associated with the task. It improves record-keeping accuracy, communication, and alignment with organizational processes and objectives. Custom fields also facilitate the capture and tracking of specific metrics, preferences, or characteristics vital for effective task management and decision-making, ultimately enhancing the usability and effectiveness of the Service Task. Within IRIS, RAs possess the capability to incorporate custom fields, providing them with the advantage of obtaining supplementary information tailored to their specific requirements. RA(s) can add custom field following these steps:

To add/edit a Custom field on the task level, navigate to **Administration > Program Service Task Maintenance**.

1. Select on **Program Service Tasks** tab.
2. Click on **Custom Fields** column. A new window will appear.
3. Click on **Add Custom Field** button. It will take us to another pop-up window. Enter all the required information for custom field.

a. **Name:** Name of the custom field e.g. SSN Num.

b. **Data type:** Drop down lists four supported data types. Depending on the type or purpose of custom field, user can select the data type from Bit, Date, DateTime and Integer (used in this example)

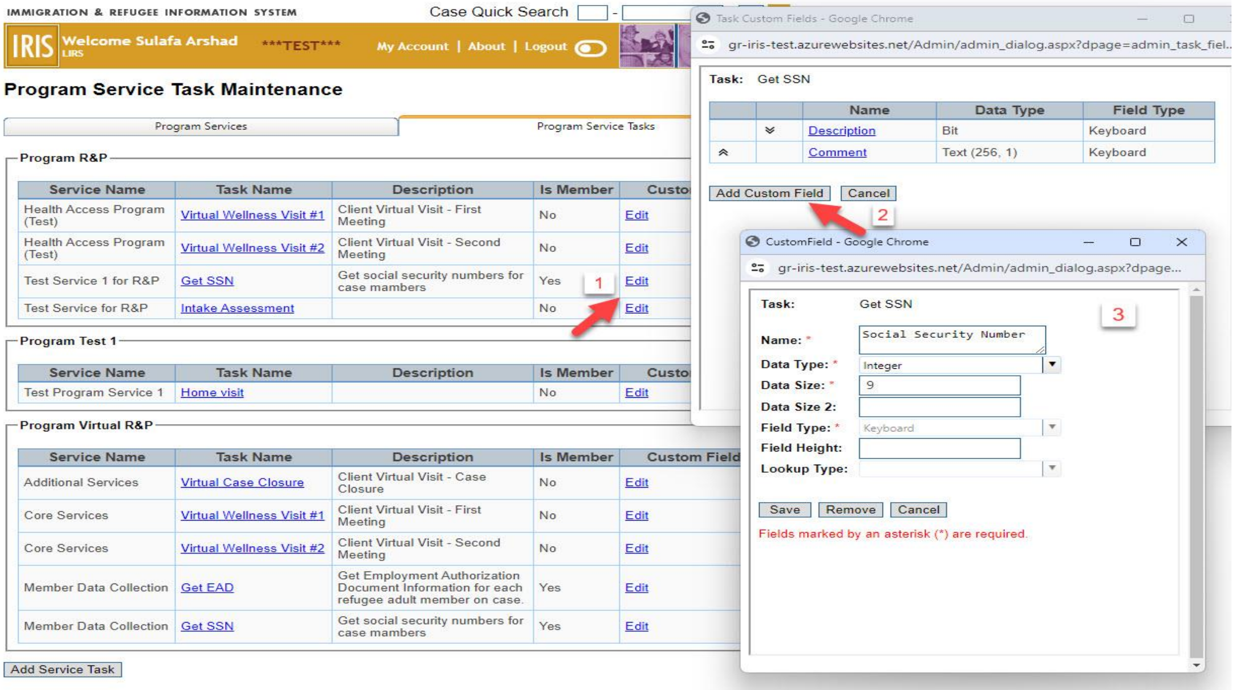
c. **Data Size:** It can vary from 1 to 300. In this example, for SSN, it's showing as limited to nine digits.

d. **Field Type:** Keyboard (by default)

e. **Field Height & Lookup** These fields are not mandatory and can be left as blank or with default settings.

f. Click on **Save.**

(Note: *Once you've made your selections, click "Save." Information will not be saved until you've clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)*



5.2. Associate a Program Service Task to Program Service and Program

Associating a Program Service Task with Program Service and Program allows for efficient management and organization within the IRIS system. This association enables flexibility and customization, as a single program service task can be linked to multiple Program Services and Programs simultaneously. This means that the same task can be utilized across various services and programs, streamlining workflows and reducing redundancy.

Additionally, by associating tasks with specific Program Services and Programs, it becomes easier to track and monitor task progress, ensuring that each task is appropriately aligned with its corresponding program objectives and requirements. Overall, this feature enhances the effectiveness and coordination of program management within the IRIS platform.

***(Note:** Once you've made your selections, click "Save." Information will not be saved until you've clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)*