IRIS Pre-Arrival User's Guide- New Enhancements

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1. Introduction:

The new and advanced IRIS (Immigration and Refugee Information System) application is a comprehensive platform crafted to streamline case management processes and improve usability and efficiency for refugee programs. Within the context of case management, the Pre-Arrival status represents a pivotal stage where crucial preparations and arrangements are made before the arrival of a case. During this phase, important information is collected, verified, and processed to ensure seamless coordination and assistance provision upon the individuals' arrival. RAs and affiliates will notice that several aspects of Pre-Arrival case management have received substantial enhancements, leading to the automatic creation, and streamlining of tasks that were previously manually performed.

As one of the top applications in the industry for managing all aspects of refugee operations, IRIS has recently undergone various changes to enhance usability, accessibility, and user satisfaction. It has adopted a modular design approach to simplify workflows, increase efficiency, and empower RAs and affiliates with more control over their interactions with the application.

2. Pre-Requisite

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

3. New Feature Enhancements:

To enhance and automate the Pre-Arrival process, IRIS has introduced six updates aimed at refining the user experience for RAs, fostering greater efficiency and effectiveness,

1) **Biodata Import:** Automatically associating cases with R&P or Virtual-R&P programs based on the biodata feed.
2) **Case Placement:** This functionality enables assignment of cases to Virtual R&P offices for affiliate staff to handle.
3) **USTie Verification:** This capability allows RA and Affiliate Users to verify USTie enrollment for Virtual R&P Program.
4) **Placement Update:** Updating Placement City and State to match USTie information under Assurance.
5) **Assurance Approval:** These features enable RAs to review and accept all submitted assurances by Affiliates under the Virtual R&P program, with convenient export options to RPC/START team.
6) **The Program Type Addition:** The addition of Virtual R&P (VRP) as a Program Type in IRIS ensures that all eligible cases are appropriately associated with this program type.

4. Biodata Import Process Update

This feature revolutionizes the process of uploading refugee biodata into IRIS through File Cloud, providing a seamless integration that automates the association of cases with either the R&P or Virtual-R&P programs.

To accomplish this task, the partners have utilized a data element available in biodata file, called 'Virtual Resettlement Preference' flag. This flag will help in updating the value to 'Yes' or 'No' for a new column named 'Virtual', added under Pre-Arrival > Assurance > US Ties.

In the example below, 'No' means the case was not eligible for VR&P and was automatically assigned to the R&P program category based on preset 'Virtual Resettlement Preference' flag. Similarly, if you see a value of 'Yes', then it means the case was Virtual R&P and was automatically assigned to the Virtual R&P program category. Case category will appear next to Enrolled Programs.

5. Case Placement by RAs

Pre-arrival process starts when a case is placed with the affiliate. This is a pre-existing process where RA assign a refugee case to their affiliate staff.

RAs can place a case with affiliate, by simply navigating to Main IRIS Dashboard > **Case Management** > **Place Cases**. This action will take the user to a new page related to **"Case Placement"**. It lists all the cases that have not yet been placed. **Select a case** that needs placement. On the case information page, click on **Placement** tab under **Pre-Arrival**. The below screen will be displayed.

Next, click on **Placement** button. A small pop-up window appears.
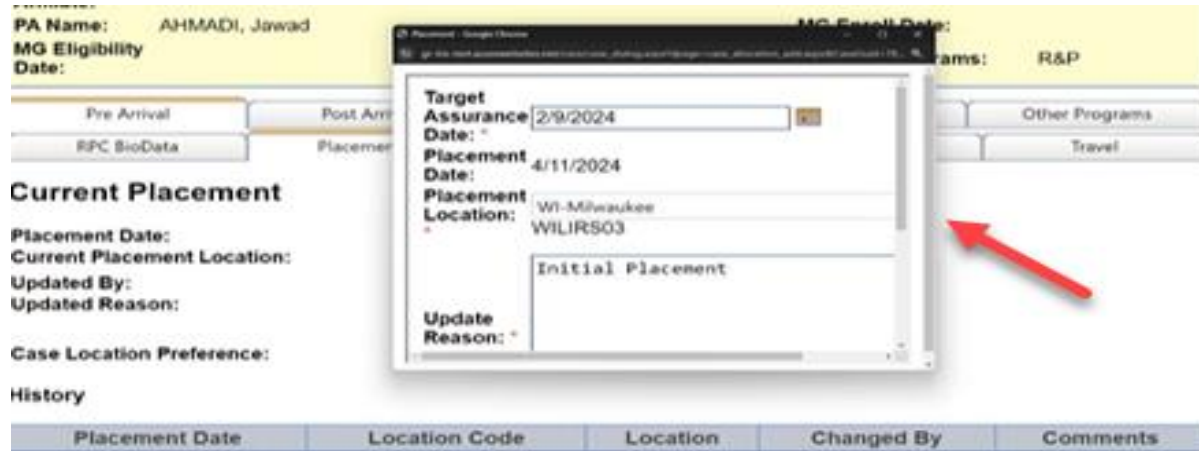
We enter the required affiliate's information in this widow. Once case placement is done, it will display the details of current placement as shown in the below screenshot.
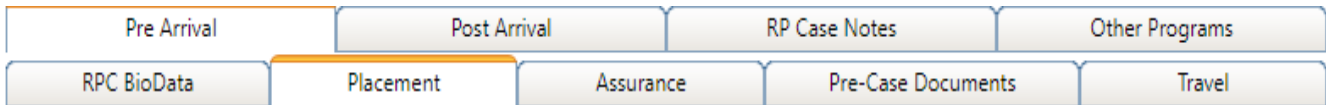
Current Placement

Placement Date: 4/11/2024
Current Placement Location: WILIRS03: Lutheran Social Services of Wisconsin and Upper Michigan - Milwaukee-Milwaukee
Updated By: Shiva Tripathi
Updated Reason: Initial Placement
Case Location Preference: Clemmons North Carolina

History

Placement Date	Location Code	Location	Changed By	Comments
4/11/2024	WILIRS03	Lutheran Social Services of Wisconsin and Upper Michigan - Milwaukee	Shiva Tripathi	Initial Placement

5.1 Affiliate access to Assigned case:

Once a case is assigned to affiliate staff, the changed case details are available under the **Assurance details** tab.

As soon as the case is placed with an affiliate, the details of Placement City and State is displayed. Earlier our affiliate partners did not have the ability to manually change the placement city and state but now with the new enhancement they are provided the ability to do so.

6. Assurance Process

6.1 Assure as Agency Sponsored:

During the assurance process, affiliates can do so with their affiliate agency, that means the placement city and state will be same as where the affiliate office is located. If the assurance is Agency sponsored Case, affiliate need to click on the checkbox to have it indicated on the case **(as shown in the screenshot)**.

Affiliate enters **Other Bio Information** in the box and click on the checkbox to confirm all the information is correct on the case. Clicking on **Assure** and **Save** buttons will update the status on the case.

Once the affiliate assures the case and saves the changes made. **Assurance Status gets updated.**

6.2 Assure with US Tie:

To assure a case with US Tie address, a US Tie must be confirmed **(as in the screenshot)**.

Affiliates are required to confirm a US Tie. **That means the US Ties status must be noted down. It should be identified, updated, or confirmed.**

On the affiliate portal, assigned affiliate verify and confirm the US Tie information by clicking on the checkbox and the Save button (as shown in screenshot).

Once the US Tie is confirmed, it changes from **Possible US Tie** to **Validated US Tie** and the status changes to **Identified**.

Whenever there are any changes made in US Tie information, the status changes to Updated or Confirmed based on the changes made on the US Tie information.

Once the US Tie is identified, under the **Assurance** tab, there will be a new checkbox that allows the affiliate to **Assure this case with US Tie.** As soon as the affiliate clicks on the checkbox, the Placement City and State gets updated with the US Tie city and state. Clicks on the checkbox to confirm all the information is correct on the case. Clicking on **Assure** and **Save** buttons will update the status on the case.

Left side of screenshot is of Affiliate portal and right side of screenshot is of RA portal

Once the affiliate assures the case and saves the changes made. **Assurance Status gets updated.**

Note: This is the first process where the case is assured by affiliate as Agency Sponsored Case but additionally affiliates have the ability to change the address on the case whenever they want to. As soon as the assurance process is complete, affiliates lose the ability to make any changes

7. Assurance Acceptance by RA:

Once the case is assured by the affiliate, it's sent back to RA. RA the review the case and confirm the information/changes are acceptable by selecting **"I confirm all of the information is correct and this case is assured"**. Click on the **Assure** button to save the changes.

Once the assured case is accepted and confirmed by RA, it takes aways ability of affiliate to further make any changes or updates on the case on affiliate side unless asked by RA.

8. Assurance Correction or Amendment by RA

If any changes are required from affiliate, RA sends the case back to the affiliate for amendments. To do so RA clicks on the **Request Amendment Assurance** button.

A new window appears where **RA** inputs **New Target Assurance Date** and **Amended Assurance Request Reason.** Click on **submit to** send the case back to affiliate.

AGENCY: Lutheran Social Services of Wisconsin and Upper Michigan - Milwaukee
CASE NUMBER: AF-10101846
PA NAME:
CURRENT TARGET DATE: 2/9/2024

New Target Assurance Date: * 4/11/2024

Amended Assurance Request Reason: *

TEST

Submit Cancel