IRIS Post Arrival User's Guide

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1. Introduction

The new modern IRIS (Immigration and Refugee Information System) application is designed to streamline case management processes, increase usability and efficiency refugee programs. RAs and associates can establish any program by providing related details and enrolling refugee cases into suitable programs.

In the rapidly evolving technological landscape of today, every crucial software application and platform must remain continually up to date to align with high demands of enhanced time efficiency and work-related productivity standards. The IRIS application aims to accomplish the same. Being one of the top applications in the industry for managing all aspects of refugee operations, IRIS has recently undertaken number of changes to enhance usability, accessibility, and user satisfaction. It has implemented a modular design approach aimed at simplifying workflows, boosting efficiency, and granting users more control over their interactions with the application.

As a result, the IRIS application has evolved into a comprehensive platform for resettlement agencies (RAs) and their associates, facilitating the management of all post-arrival programs, services, and tasks in one convenient location.

This user guide aims to provide step-by-step instructions for users to efficiently navigate and utilize the features of the IRIS application and customize it according to their needs. For further reference use <u>IRIS Modernization Guide</u>.

2. Pre-Requisite

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

3. Enroll a case into Program

Based upon RPC biodata requirement, a case can be enrolled into R&P and Virtual-R&P program. Additionally, the case may be enrolled in other programs supported by the organization. If a refugee case hasn't been linked to a specific program yet, you can do so by following these steps:

- 1. Navigate to the "**Other Programs**" tab within the platform and click on the "Add Other Program" button. This action will prompt a small pop-up window to appear on your screen.
- 2. In the pop-up window, you'll see a dropdown menu labeled "Select Program." Click on this dropdown menu. All the associate programs can be seen here that are provided by your agency.
- 3. Select the appropriate program from the list. Once you make your selection, other Program info will appear such as Abbreviation and Description of the Program that was entered during the Program creation.
- 4. Select Start and End Dates. Start date will be the eligibility date indicate date at which refugee case got enrolled in the program and end date will be date at which program service ended. Once you've made your selections, click on the "Add" button to finalize the association of the case with the chosen program.

Pre Arrival	Post Arrival	RP Case Notes	Other Programs	🕙 Program - Google Chrome — 🗆
er Program Case Notes				gr-iris-test.azurewebsites.net/case/case_dialog.aspx?dpag
ograms				Program: * Virtual R&P
Program	Date Star	t Date End	Added By	Abbreviation: VRP Description: TEST
irtual R&P			Shiva Tripathi	Start Date:
Other Program				End Date:
rtual R&P				Add Clear Cancel

4. Generate Service Tasks associated with Program.

Follow these steps to add Service Tasks associated with the Program.

1. Go to the "Tasks" tab and locate the "Add Task" button. By clicking on this button, a pop-up screen will appear, allowing you to generate a new task for the refugee case.

	al	Post Arrival		RP	Case Notes	s ľ	Other Pr	ograms
Client Data	Financial Tracking	R&P Reports	Cultural (Drientatio	Case Form	ıs	Tasks	Activities
asks dd Task Program Virtual	D&D							
i iogram i intaar	i di							
Service Name	Task Nar	ne	Member	Stat	us Co	ompleted Date	Due Date	Notes
-			Member	Stat	us Co		Due Date 5/30/2024	Notes
Service Name	Task Nar	<u>e</u>	Member	Stat	us Co			

2. In the pop-up window, you'll find a dropdown menu labeled "Program." From this dropdown menu, select the program associated with the task you're creating.

- 3. Next, select the specific service related to the task from the dropdown menu labeled "Service." This helps to categorize the task based on the type of assistance or service required.
- 4. Once you've selected the service, additional options for specific tasks will appear based on the service type chosen. Review the available task options and make the appropriate selection(s) that align with the needs of the case. You can choose multiple tasks if necessary.
- 5. After finalizing your selections, click on the "Save" button to save the newly created task. This action will integrate the task into the case management system, ensuring it is tracked and addressed accordingly within the chosen program and service framework.
- 6. Refresh the page and all the added tasks appear in the list next to the Service Name.

ſ	RP Case	Notes	Other P	rograms		0				
Cultural Orie	entatio Case	e Forms	Tasks	Activities		Case Task - Goo	azurewebsites.net/case/case_dial	log.aspx?dpag	- 🗆 ge=case_ta	× sk
/lember	Status	Completed Date	Due Date	Notes	•	Program: * Service: Tasks:	R&P ▼ Legal service ▼ Select Service Legal service Test Service 1 for R&P			Î
			5/30/2024			Save	Test Service for R&P			
			3/21/2024			Fields marked				
			3/6/2024	Notes(1)						
rke, Lard			5/30/2024							

(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.)

4.1 Assign a Task to staff/Caseworker:

Tasks associated with refugee cases can be assigned to specific case workers who are responsible for their completion. The assignment of tasks is facilitated by referencing information stored in the IRIS database, ensuring that tasks are allocated to appropriate staff members based on their roles and responsibilities.

- 1. To assign a task to a case worker, begin by selecting the task from the list of available tasks within the IRIS application.
- 2. Upon selecting the task, a pop-up window will appear, providing detailed information about the member associated with the task and the current assigned caseworker.

Client Data	Financial Tracking R&P Repo	orts Cultural Orie	ntatio Care	Forms	Tasks	Activities				
Client Data	rinancial fracking Kor Kepc		intatio case	ronns	Idoko	Activities	Case Service Task - Google Chrome	-		×
isks							gr-iris-test.azurewebsites.net/Case/case_dialog.aspx?dpage=case_ta	ask_edit.as	ox&Cas	se
ld Task							Program: Virtual R&P			
Program Virtual	R&P						Service: Member Data Collection			
Service Name	Task Name	Member	Status	Completed Date	Due Date	Notes	Task: Get SSN Member: PETERS, ELAINE			
Additional Services	Virtual Case Closure				5/30/2024		Assigned Caseworker: Select Caseworker	-		
Core Services	Virtual Wellness Visit #2				3/21/2024		Activity Method: Select Caseworker	-		۰.
Core Services	Virtual Wellness Visit #1				3/6/2024	Notes(1)	Status: BECK, WESLEY			
Member Data Collection	Get EAD	BURKE, WILLARD			5/30/2024		Completed Date: BURNS, BRENDA CAMPBELL, BYRON			
Member Data Collection	Get EAD	LYNCH, CARLA			5/30/2024		Due Date: 4/12/2024	1		
Member Data Collection	Get EAD	HAMILTON, ROBERTA			5/30/2024		Is Required:	1		
Member Data Collection	Get EAD	SUTTON, ELSIE			5/30/2024		Custom Field 2]		
Member Data Collection	Get SSN	BURKE, WILLARD			4/12/2024			1		
Member Data Collection	Get SSN	LYNCH, CARLA		M	4/12/2024		Save Cancel			
Member Data		HAMILTON					Fields marked by an asterisk (*) are required.			

4.2 Navigate through Case Service Tasks window:

Clicking on any Task opens a new window where you can assign the task to a caseworker. This is called "Case Service Task" window. The window displays pre-populated information such as Program Name, Service, and Task, along with additional required details as explained below.

Ť	Other P	rograms			
	Tasks	Activities	Case Service Task - Google Chrome	e .	- 0
			gr-iris-test.azurewebsites.ne	et/Case/case_dialog.aspx?dpage=case_	_task_edit.aspx&Ca
			Program:	Virtual R&P	
			Service:	Member Data Collection	
pleted			Task:	Get SSN	
ate	Due Date	Notes	Member:	PETERS, ELAINE	
	5/30/2024		Assigned Caseworker:	Select Caseworker	
	3/21/2024		Activity Method:	Select Activity Method	-
	3/6/2024	Notes(1)	Status:	Select Activity Method	
	5/30/2024		Completed Date:	Phone	
			Due Date:	In Person	
	5/30/2024			Message	
	510010001		Is Required:		
	5/30/2024		Custom Field 1		
	5/30/2024		Custom Field 2		
	4/12/2024				
	4/12/2024		Save Cancel		
			Fields marked by an asterisk (*)	are required.	

- 1. Assigned Caseworker: The dropdown menu offers a selection of suitable staff members based on their respective roles and duties within the resettlement agency or affiliate office. Assign tasks accordingly to ensure prompt and effective completion.
- 2. Activity Method: Record any relevant activity method related to the task i.e. Email, Phone, In Person or Message. This ensures a thorough record of all actions taken, maintaining documentation of communication and collaboration efforts.
- 3. **Status:** Monitor the progress of tasks by tracking their status. This includes identifying tasks that are pending, in progress, or completed, allowing for effective task management.
- 4. **Completed Date:** Mark tasks as completed by entering the date of completion manually or by navigating and choosing a date from the calendar icon. This action updates the task status and allows for the closure of completed tasks within the case management system.
- 5. **Task Due Date:** Similarly, in order to ensure tasks are completed within the specified timeframe, you can enter an estimated due date. Note that if the due date is calculated from the arrival date, ensure the case has arrived and the arrival date is updated before setting the due date.
- 6. **Is Required:** Check the box if this task is mandatory and required according to the established case-related guidelines.

7. Additional Custom Fields: If a Task has additional custom fields which requires additional information for task completion, ensure to complete all required details.

5. Logging a Case Note Task

Under the Task tab in IRIS, all Tasks associated with refugee cases are displayed under this tab. Case managers have ability to associate one or many case notes to each task in order to update progress on task or provide additional information or documents as attachment for task. Following steps can be used to create case notes for Tasks:

- 1. Under Tasks tab, locate the task for which you need to add a case note.
- 2. Click "Add" button to open Case Note creation window.

Client Data	Financial Tracking	R&P Reports	Cultural Orier	ntatio Case	Forms	Tasks	Activities
asks							
dd Task							
Program R&P—							
			Member	Status	Completed	Due Date	Notes
Service Name	Task N	ame	Member	Status	Date	Duo Duto	Notes
Service Name Health Access Program (Test)	Virtual Wellness		Member	Status	Date	1/26/2023	Add

- 3. Enter case note related details:
 - a. **Medical Information** Select 'Yes' if you are including medical information in your case note otherwise select 'No'.
 - b. Note Summary Enter summary of your case notes.
 - c. **Note Description** Enter description of your case notes.
 - d. Attached Documents Attach any supporting documents related to your case notes.
 - e. Note Date This indicates date at which this case note is initiated.
 - f. Viewable by Affiliates This checkbox allows affiliate staffs to view case notes in IRIS. Uncheck this box if this case notes should be viewable by HQ/RA staff only.

Pre Arri	Pre Arrival Post Arrival			RP Case Notes	Othe	Other Programs		
Client Data	Financial Tracking	R&P Reports	Cultural Orienta	io Case Forms	Tasks	Activities		

Medical Information: *	○ Yes ● No
Note Summary: *	
Note Description: *	
Attached documents:	Choose File No file chosen Upload
Note Date: *	3/30/2024 10:4 🛗 🕑
Viewable by Affiliates	
	Specifying that this note contains restricted medical information will prevent it from appearing to users who have not been given 'health' data privileges.

Save Save Draft	Cancel		
Fields marked by an aste	erisk (*) are required.		

6. Logging an Activity to Task

The Activities tab allows logging an activity to a Task which allows case managers to track communications with refugee clients using different communication modes. Follow below steps to log an activity on Tasks associated with refugee case:

1. On Activity tab, select the type of activity you need to create a log of.

Pre Arrival Post Arrival		Arrival	RP Case Notes	Matching Grant		Other Programs	
Client Data	Financial Tracking	R&P Reports	Cultural Orientatio	Case Forms	Tasks	Í	Activities

Add Email Add Phone Call Add Message Add Video Call Add Mail									
Activity Date	Activity Type	Task Name	Details	Completed date	Due date	Notes			
4/4/2024 3:41 PM	<u>Task</u>	Virtual Wellness Visit #2	Task created		1/26/2023	<u>Add</u>			
4/4/2024 3:41 PM	<u>Task</u>	Virtual Wellness Visit #1	Task created		1/10/2023	<u>Add</u>			
3/27/2024 6:00 AM	<u>Email</u>	Virtual Wellness Visit #1	TEST			<u>Notes(1)</u>			

- 2. Upon selection of Activity Type, a pop-window will appear consisting details of activity. Enter following information to complete an activity log:
 - a. Activity Type: Indicates type of activity selected during activity creation.
 - b. Activity Date: Activity Date can be changed to date at which actual activity was initiated by case worker.
 - c. **Task**: Case worked can select a Task from list of tasks associated with refugee case in order to indicate activity is in response to task associated with refugee case.

ase Activity - Google Chrome	tails of Activity.
Activity Type: *	Email
Activity date:	4/1/2024 12:00 🛗 🕒
Task:	Health Access Program (Test), 🔻
Details:	This is a sample activity.
Save Cancel	

3. Click 'Save' and activity log will be created and can be viewed under Activity tab.

Pre Arrival		Post Arrival		RP Case Notes		Matching Grant			Other Programs	
Client Data	Finano	ial Tracking	R&P Reports	Cultural Orientatio	Case F	orms	Tasks		Activities	

Activities

Add Email Add Phone Call Add Message Add Video Call Add Mail										
Activity Date	Activity Type	Task Name	Details	Completed date	Due date	Notes				
4/4/2024 3:41 PM	<u>Task</u>	Virtual Wellness Visit #2	Task created		1/26/2023	<u>Add</u>				
4/4/2024 3:41 PM	Task	Virtual Wellness Visit #1	Task created		1/10/2023	<u>Add</u>				
3/27/2024 6:00 AM	Email	Virtual Wellness Visit #1	TEST			<u>Notes(1)</u>				