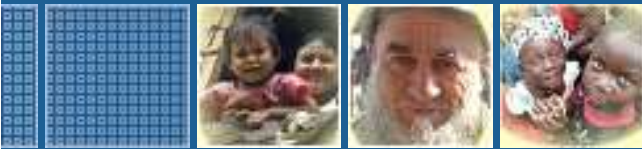**IMMIGRATION & REFUGEE INFORMATION SYSTEM**

IRIS

Affiliate Agency Staff
Users' Guide

Matching Grant and Other Programs

Updated: 01/13/2020

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MG Functions and Reporting in IRIS

Affiliate sites that have the Matching Grant program will use IRIS to enroll and manage Matching Grant (MG) cases. Please contact your administrator or national office if you need assistance with MG permissions in IRIS.

A case may be enrolled in the Matching Grant program if it already exists as an R&P Case in IRIS. In addition, you may add your own non-R&P cases to IRIS. Once the case is in IRIS, the enrollment process for both R&P and non-R&P cases is the same.

Adding a Non-R&P Case to IRIS

On the left side of the IRIS Dashboard, there is a link "**Add a Non-Refugee Case**." Clicking on this link displays the following screen.

Fill in all required fields marked by an asterisk. Specify the **type** of case from the dropdown list. Two of the case types are similar, so the difference in each is described below. ***For both of these case types, you must get prior approval from your national office.***

Other VOLAG Refugee	Refugee case resettled by another agency in your area, but due to special circumstance, that agency cannot enroll the case in the Matching Grant program.
Secondary Migrant	Refugee case member resettled by your agency or another agency in a different region who then moves to your area and wants to be enrolled in the Matching Grant program.

The Affiliate field will default to the affiliate location of the user who is signed onto IRIS. If the user is assigned to the main office and his credentials allow him access to sub-offices, he will have the ability to modify the Affiliate field, otherwise it will be grayed out.

Before saving a non-refugee case or case member, IRIS does several checks to validate the alien number.

If the alien number already exists for an R&P case member, then IRIS provides the following warning message.

Alien Number is used by an R&P case. Do you want to proceed and use the same Alien Number for this non-refugee case member?

If Yes, please press Submit button again

If the alien number already exists for another non-refugee case member, then IRIS will provide the following error message. In this case, the alien number may not be entered again because the individual is already in the database.

Alien Number is already in use. The active case must be closed to use this Alien Number

Click the Submit button to save the data you entered. IRIS will present you with the following screen.

At this point, the Case Size is 1. The next step is to add more case members.

Click the **Member** tab to start this process.

The new case member is shown in the Case Members screen. To add a new case member, click the Add Member button to open the new member entry screen.

The fields with red asterisks are required. Complete the fields and then click the Submit button.

The new case member is shown in the Case Members screen. Continue adding members by clicking the Add Member button.

Note: The Alien ID is a **link** that may be clicked to edit this case member.

You will also need to add the ethnicity for non-refugee cases. This must be done for the "PA" Only. If more members are added, then Birth Country, Nationality, and Ethnicity pre-populate from the PA.

Enrolling a Matching Grant Case

To enroll a case in the Matching Grant program, click on the **Matching Grant** tab and click the Enroll Case in MG button. Both R&P and Non-R&P cases have a **Matching Grant** tab.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search [ ] - [ ] - [ ] Go

IRIS **Welcome Veronica Affiliate**
LIRS

My Account | About | Logout

Case ID:	A -45321667	Case Size:	2	Allocation Date:	None
Case Type:	Asylee	Processing Status:	Arrived	Assurance Date:	
Case Pool:		Active Status:	Active	Eligibility Date:	10/4/2010
Affiliate:	05 - CO-Denver			MG Enroll Date:	
PA Name:	Henry, Janet			Enrolled Programs:	None

Pre Arrival | Matching Grant | Other Programs

Case is not currently enrolled in the Matching Grant Program.

Enroll Case in MG

On the Enroll MG Cases and Members form, you will enter the **enrollment date** and select the MG **case members** by checking the **Add** checkbox for each. Next, indicate which members are **Employable**. At least one member of the case must have their Employable status set to **"Yes"** in order to save the MG enrollment.

Enroll Matching Grant Cases and Members

Enrollment Date:* 1/1/2018   Reporting Year: 2018 ←

Enroll Members From:

This Case (A -112233449)

Add	Employable?	Name	Relation	Alien #	Enrollment Age
☑	Yes	Lname1, Fname1	PA	112233449	53
☑	Yes	Lname1, Fname2	WI	777888666	49
☐	No	Lname1, Fname4	SO	111555999	6
☐		Lname1, Fname3	GM	666555888	54

Comments:

Save   Cancel

If all members of the family are part of the same MG case, then click Save and the enrollment process is complete. IRIS will add all of the members of the case to your MG Enrollment (MG-1) report.

Note: IRIS defaults to the Reporting Year the case is being enrolled in.

Contact your national office, if the following changes are needed:
1. Reporting year
2. Enrollment date after 31 days from arrival
3. Employable = Yes for individuals with age under 18 or over 65

If an individual has a job, then IRIS will require Employable equal to yes.

Now on the **Matching Grant** tab you will see the enrollment information for this case. Use the Edit Enrollment button to make changes to the case composition, or the Open Case File button to access the Matching Grant case details.

Splitting a Case

If you wish to split the case according to specifications detailed in the ORR Matching Grant Guidelines, On the Matching Grant tab, click the Add New MG Case button.

Please check with your national office contact if you are not sure when this is allowable.

This button will only be displayed if there are members that were not enrolled in the first MG Case that are available to add to another MG Case. An example of this is shown below.

You may then assign the different individuals to different cases using the **Add** checkbox. Remember to make at least one member **"Employable".**

Enroll Matching Grant Cases and Members

Enrollment Date:* 10/4/2010   Reporting Year: 2010

Enroll Members From:

This Case (A -45321667)

Add	Employable?	Name	Relation	Alien #
☑	Yes	Henry, Janet	PA	45321667
☑	No	Henry, Apple	AD	99988882
☐	No	Henry, Adam	AB	99998886

Comments: *

Save   Cancel

In the example below, one family member is enrolled in **MG Case 1** and two in **MG case 2**. In addition, there is an adopted brother that was **not enrolled** in any MG case.

IMMIGRATION & REFUGEE INFORMATION SYSTEM   Case Quick Search ___ - ___ - ___ Go

IRIS LIRS   Welcome Veronica Affiliate   My Account | About | Logout

Case ID:	A -45321667	Case Size:	4	Allocation Date:	None
Case Type:	Asylee	Processing Status:	Arrived	Assurance Date:	
Case Pool:		Active Status:	Active	Eligibility Date:	10/4/2010
Affiliate:	05 - CO-Denver			MG Enroll Date:	10/4/2010
PA Name:	Henry, Janet			Enrolled Programs:	MG

Pre Arrival   Matching Grant   Other Programs

MG Enrollment Date: 10/4/2010   Reporting Year: 2010

MG Case 1
Members: Henry, James
Open Case File   Edit Enrollment

MG Case 2
Members: Henry, Janet
    Henry, Apple
Open Case File   Edit Enrollment

Members Not Enrolled:

Name	Relation	Alien Number
Henry, Adam	AB	99998886

Add New MG Case

Enrolling Members from Two Different R&P Cases

In very limited circumstances, it is possible to enroll members from **two different** R&P cases in the **same Matching Grant case**. If there is a hard cross-referenced or hard travel/soft resettle case that arrived within 30 days of this case, then IRIS will display the Add Related Members button on the MG Enrollment screen. The ORR Matching Grant Guidelines state that to be joined, the cases must have **arrived on the same day** and the household composition must be recognized as a household by your state.

Please contact your national office if you are unsure whether it is allowable to join two cases.

You will now see the individuals in the related case and have the ability to **add them.** Notice that the **"Explain Relationship"** text box is required. The information entered here will be sent to the national office in an IRIS notification e-mail so that they can be aware of this situation.

A case member can only be enrolled in **one** MG case. If Reginald Butler was already in his own Matching Grant case, then he would not be available to be combined into this case with his father. You would need to **un-enroll** him from his own case in order to **add** him to this one.

After combining case members, the MG Case looks like this:

MG Enrollment Report (MG-1)

The **MG Enrollment Report or MG-1** can be accessed from the dashboard Standard Reports link under the Matching Grant tab.

The MG-1 Report lists all of the clients you have enrolled in the **MG program.** Clients are sorted by **Date of Arrival (or eligibility date).** The first columns are your individual, case, and employable counts. In addition, the information you enter into the 120 and 180 day reports is imported directly to the **MG-1.**

Please note: The MG-1 does not include work information **(i.e. FT/PT, wage, benefits)** for any jobs obtained after the **120th** day. This is because these statistics are not reported to ORR. The information is retained on the Job Placement screen for your records.

The MG-1 Report is your main interface with your national office. National MG Coordinators and finance staffs access these reports on the 10th of each month and reconcile your enrollment numbers for the previous month with what you have reported on your reimbursement requests. National MG Coordinators also look at your 120 and 180 day statistics and may contact you if they have any questions. All 120 and 180 day reports must be completed in IRIS by the 10th day of the month following the month in which the report is due.

Working with a Matching Grant Case File

When you click on the Open Case File button, IRIS displays the full Matching Grant case in a new set of screens. The Case Header is replaced by the Matching Grant Header that shows key MG dates and statuses. Below are the **Matching Grant** section tabs: **MG Main**, **Finances**, **120 Day Report**, **180 Day Report**, and **Case Forms**.

Once the case reaches the 120th and 180th days, you will also see tabs for the **120 Day Report** (MG-2) and the **180 Day Report** (MG-3):

MG Main

MG Members

The **MG Main** tab is where you will see the basic enrollment information for the Matching Grant case members. Each **enrollee's** name is displayed as a link. Clicking on the **name link** will open up the screens to enter information about that member. The Header screen contains the **Case link** that will take you back to the MG Main screen.
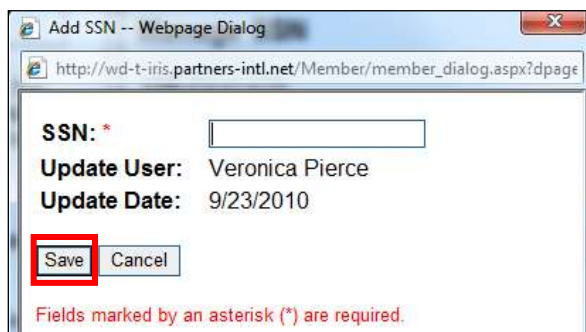
The individual tabs, shown above, are actually linked to the R&P sections with the same name. So, if you have been maintaining the **Social Security Number**, **Address** and **Jobs** in that section, then it will appear here and you will not have to re-enter them.

SSN

The **SSN** History is maintained so that previously **used** numbers, including **typos** are listed for reference, and for sending to an **external Travel Loan** system.

Click the Add / Edit SSN button to add a **new** Social Security Number. Complete the SSN field – you do not need to enter the dashes – and then click the Save button.
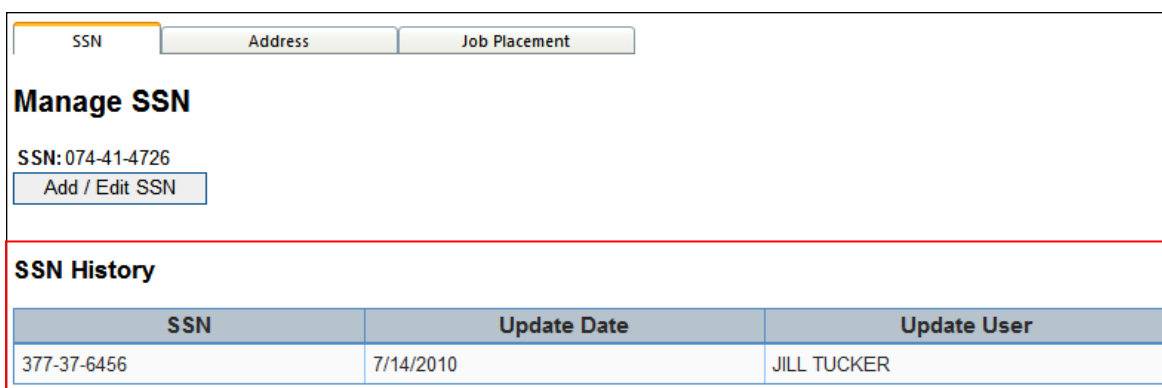
The newly entered SSN is displayed, along with the **SSN History** notation.

Address

Under the **Address** tab, you can **add** the case member's address, and keep it **current** as it changes over time. Starting with the **PA**, click the Add Address button to add a new address.

The Address dialog window opens. Complete the fields and click the Save button to save the new address.

The address now appears in the list. You can click on the **address** link to open up the Address dialog window and edit the address if needed.

For subsequent members of the case, IRIS will initially assume that they are living at the same address as the **Principal Applicant**. When you navigate to another member's address tab, the **"Same Address as PA"** box will be checked.

If you need to change the address, uncheck the box. The Add Address button will appear and the system will allow entry of a separate address.

Job Placement

The **Job Placement** tab allows you to track a case member's job history over time. To add a new job, click the Add Job button.

Note: If an individual is enrolled in MG and has Employable equal to Yes, then IRIS does not allow adding a job for that individual.

A dialog box will appear in which you may **add** and **save** the job information. The top portion is **required** for all clients. The bottom portion is for individuals in the **Matching Grant Program**. The follow up information you enter here will transfer directly from this form to the **MG 120** and **180 day** reports.

To edit a Job Placement entry, click on the **Place of Employment** link. For your records, the Job Placement Screen will keep a history of all job upgrades and previous jobs. Please be sure to enter a **termination date** if a client stops working at a particular job. This will ensure that the job is not erroneously recorded on the MG-1 and reported to ORR.

Note: If the user changes the job start date, the first record of wages and hours will change to match.

Finances

In the **Finances** section, you can enter the expenses that have been gone towards this case. These include Federal Cash, Match Cash, and Match In-Kind Donations. These amounts are used to create the Matching Grant Expense Report (MG-8).

For each expense item to be added, you will click on the Add Another Item button. A data entry screen will be displayed. Fill in all required fields, click **Save**
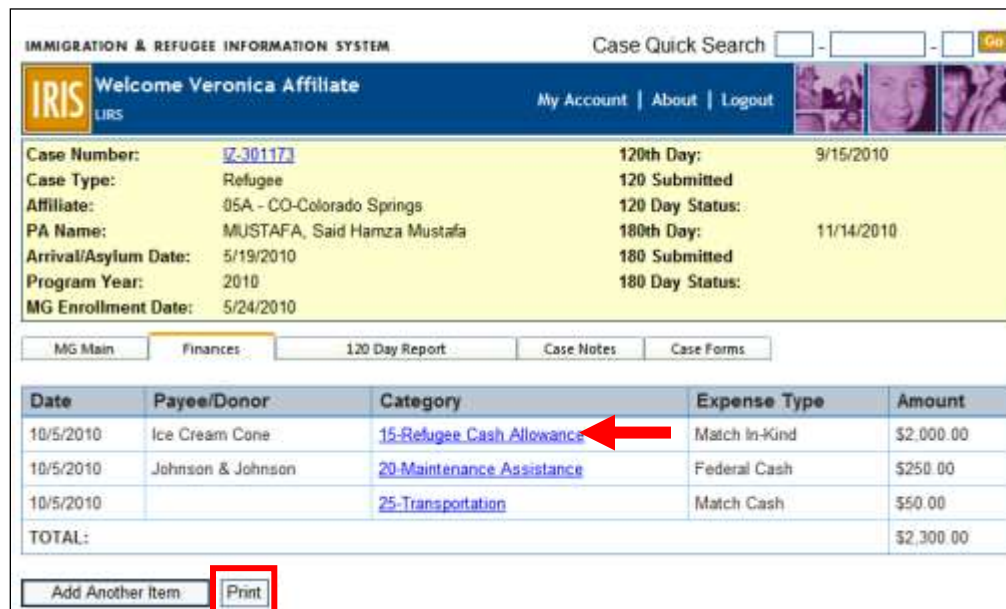
Refer to your **national MG Coordinator** for guidance on using expense categories.

Once you have added the expenses, they will show on the finance page and you can **print** a list of expenditures for your files.

120 Day Report

As soon as a **Matching Grant** case reaches the 120th day from the **date of arrival** or **asylum granted**, it appears in an online IRIS Notification called **120 Day Report Due**. Cases remain in this notification until the 120 Day Report is **completed, saved** and **submitted**. The notification is useful as a working list of what is due at any given moment.

Clicking on **the notification** link will take you to a list of cases with reports due.

To access the report, click on the **PA's** name.

Part A is pre-filled from the Case Member's **Job Placement** entries. If no job placements have been entered, or if the job start date was after the 120th day, then this section will be blank and the report cannot be submitted with a **status of 11 (self-sufficient).** You may enter a job from the report screen by clicking Add Job for the appropriate client. You will also notice a box to choose which job will be used on the **MG-1** Report. If there is only one full-time (FT) job or one FT and one part-time (PT) job, IRIS will choose the FT job. However, if you have a client with more than one FT job, you will need to mark the one you wish to report on the MG-1. If a client has **multiple** PT jobs that add up to at least 40 hours per week, IRIS will count this as a FT placement and average the wages of the multiple jobs.

A job may have hours per week and wage per hour that change over time. For this reason, when the hours and wage are entered the "Effective Date" is also entered. If the effective date is after the case's 120th day then it will not be included in the report. The system will indicate this as an error when the report is submitted so that the job's wage and hours may be entered with a date that is not after the 120th day. The same process is implemented for the 180 Day Report.

Part B:
The following are the statuses you must choose from for part B of the 120 Day Report. You may also reference the **"Matching Grant Progress Report – Glossary of Terms"** on www.irisweb.org.

1. **Economically self-sufficient**- ORR defines Self-sufficiency as follows:

   "Economic self-sufficiency means earning a total family income at a level that enables a family unit to support itself without receipt of a cash assistance grant. Cases and individuals receiving Food Stamps, Medicaid, etc. without cash payments, are considered self-sufficient. In order for a MG case to be counted self-sufficient a minimum of one member in each case must be employed."

2. **Not economically self-sufficient but remains in the program**

Clients who are not self-sufficient at 120 days and do not remain in the program, are considered time expired.

3. **Not economically self-sufficient and removed from the Program prior to, or on, day 120.**
   a) **Removed by Service Provider**
   b) **Dropped out**
   c) **Out-migrated**
   d) **Other**

The status you choose in part B will apply to all members of the case unless someone has out-migrated. If anyone has moved, check the **"Outmigrated "**box for each member that has out-migrated.

Matching Grant - 120 Day Report

A. Job placement information must be complete and accurate before completing Section B:

Employ Date	Term. Date	Employer Name	Hrs/ Wk	Wage	Ben	Follow-up Interviews		Use on MG1
						Employer	Refugee	
BANKS, PAMELA			Employable: Yes			Out-Migrated ☐		Add Job
2/5/2010		Home Depot	2/5/2010 40	$8.00	5/5/2010	The manager is very pleased with Pamela's job performance. She has paired her with another refugee who helps with interpretation.	Pamela said she likes the job so far but would like to switch to a cashier position if one opens up.	⦿
TORRES, GILBERT			Employable: No			Out-Migrated ☐		Add Job
3/15/2010		Hilton Hotel	3/15/2010 20	$9.00	No			⦿
3/1/2010		Walmart	3/1/2010 20	$8.50	No			
KELLY, MISTY			Employable: No			Out-Migrated ☐		Add Job
FOX, GLORIA			Employable: No			Out-Migrated ☐		Add Job

B. Choose the appropriate 120 Day status, with comments as needed:

☐ **1) Economically self-sufficient** (Self-sufficiency is defined as "no longer receiving cash assistance payments from Matching Grant or public cash assistance programs due to earnings from employment")

☐ **2) Not economically self-sufficient** (Continues to receive MG services and/or MG cash support)

☐ **3) Time expired** (Not self-sufficient at the 120th day, but will not be kept in the MG program)
☐ a) Applying for public cash assistance

  4) Dropped out prior to 120th day (Check appropriate category below)
☐ a) Accessed public cash assistance
☐ b) Outmigrated
☐ c) Other (May have been sanctioned from the program due to non-compliance) explain below

Comments:

Save	Save & Submit to Volag	Print MG Follow-up Report

When you have finished with the report, you have the option of saving it without submitting it to the RA or **Saving and Submitting**. You can also **Print** the report from this screen.

Once the report has been **Saved** and **Submitted to RA**, an Update Report button is displayed to allow you to make changes and resubmit. Once the current reporting period is over (see the **Locking** section below), however, the report will be locked and may only be modified by contacting the **RA Matching Grant Coordinator.**

Once the 120 Day Report is **saved** and **submitted,** the Matching Grant Header will change to reflect this submission:

180 Day Report

As with the 120 Day Report, as soon as a Matching Grant case reaches the **180th day** from the **date of arrival** or **asylum granted**, it appears in an online IRIS Notification called **180 Day Report Due**. Cases remain in this notification until the 180 Day Report is completed, saved and submitted. The notification is useful as a working list of what is due at any given moment.

To access the report, click on the notification link and then the client's name.

The 180 Day Report takes into account the **status** that was submitted on the 120 Day Report. If the 120 Day status was **1**, then only the options in section A are available. If the 120 Day status was **2**, then only options in section B are available. If the case did not continue in the program – **status 3**, then this report is not required and the **180 Day status** will reflect the same status reported at 120 days.

Once you have finished with the report, you have the option of **Saving** it without submitting it to the RA or **Saving and Submitting**.

Once the report has been Saved and Submitted to the RA,
a Begin Status Change button is displayed to allow you to make changes and resubmit. Once the current reporting period is over, however, the report will be **locked** and can only be modified by contacting the **RA Matching Grant Coordinator.**

When the 180 Day Report is saved and submitted, the Matching Grant Header will change to reflect this submission:

MG Progress Report

National Coordinators submit the Progress Report, to ORR twice a year. Prior to FY 2016, the MG Program reported on trimesters. The report includes your **120** and **180** day outcomes for the relevant months. Details of the report codes and calculations may be found on www.irisweb.org/.

MG Enrollments by Affiliate and Site - Summary

This report shows all enrollments Affiliate and by month, compares to total available MG slots and calculates slots remaining.

MG Enrollments by Nationality by Affiliate and Site - Summary

This report shows a count of individuals enrolled in MG summarized by Affiliate or sub-office and individuals nationality.

Case Notes

The Matching Grants **Case Notes** section follows the same format and functionality of the other **Case Notes** sections in IRIS. Case Notes entered here are only for this particular MG Case, so if you have a **split case**, you may print the MG case notes separately.

IRIS Users' Guide

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search [ ] - [ ] - [ ] Go

IRIS
LIRS

Welcome Veronica Affiliate

My Account | About | Logout

Case Number:	IZ-301576	**120th Day:**	7/14/2010
Case Type:	Refugee	**120 Submitted**	8/9/2010
Affiliate:	05 - CO-Denver	**120 Day Status:**	2
PA Name:	YA	**180th Day:**	9/12/2010
Arrival/Asylum Date:	3/17/2010	**180 Submitted**	
Program Year:	2010	**180 Day Status:**	
MG Enrollment Date:	3/18/2010		

| MG Main | Finances | 120 Day Report | 180 Day Report | Case Notes | Case Forms |

Case Notes

Description	Date
Resume/interview	10/5/2010
Enrolled case in MG	10/5/2010

[Add New Case Notes] [Print Case Notes]

Case Forms

The **Case Forms** section contains forms that apply to this particular Matching Grant case. Below is a sample:

As with other Forms sections in IRIS, you can click on the **Template link** to open a blank copy of a particular form. This should be completed and **saved locally**, either on your computer's hard drive or a network drive. To **attach** the completed form, click the Browse button. Select the file for the completed form you have saved, and click the Open button. The file name appears in the Upload New File box.

Important: the file is not attached yet – you must click the Save File button to complete the process.

MG Case Locking

When you work with Matching Grant cases, enrolling them, and tracking their progress via the 120- and 180-Day reports, the results are collected by IRIS for the national office to submit a **Progress Report** to the Office of Refugee Resettlement (ORR). Once the **six-month** period is over and the data has been sent to ORR, IRIS protects the data from changes by **locking** certain parts of your **MG cases**.

In the example below, the case was **arrived** and was enrolled in September of 2008. Since the report for this case has been completed, the Edit Enrollment button is now grayed out, preventing you from changing case members and employable status.

Similarly, if the 120th or 180th Day for a case was reached in the previous period, then the ability to change and resubmit those reports will be **locked.**

If there is a special circumstance that requires a change to a case that was previously reported in a Progress Report, contact your national office Matching Grant Coordinator, who may **unlock** the case for your editing.

MG Management Console

The **MG Management Console** is allows you to work with your data in many useful ways. Click on the **MG Management Console** link on the navigation bar, and then click **"Show filter".**

You now have the ability to search by any of the **criteria** shown on the screen shot below. For example, you could quickly see how many Burmese cases are "Economically self-sufficient" at day 120, by choosing Burma in the ethnicity box and status 11 for 120 Day Status.

MG Management Console

MG Case Filters

Fiscal Year: *	2018
Affiliate: *	Select All ☐ Consolidate into Single Report
MG Enrollment Start Date:	
MG Enrollment End Date:	
Case Number:	_ - _ - _
Type:	All
Ethnicity:	Burma
120 Day Status:	11
180 Day Status:	All
Hide Filter	

Submit Cancel

Other Programs

Other Program Maintenance

IRIS has basic functionality to track case enrollment in other programs. An Affiliate Office may create Program's unique to their office from the "Other Program Maintenance" screen. The link is found on the IRIS dashboard.
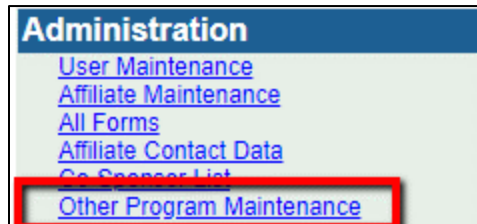
Case Notes

Case Notes for Other Programs works the same way as in other **Case Notes** sections of IRIS. One difference is that you can select for which program you are writing the case note.

On the Navigation bar, you should see a link "**Add a Non-Refugee Case**". Click on this link, fill in all required fields, and then click **Submit**

You are brought to this screen. Click on **Other Programs** tab.

Note: A list of programs must be selected before you are able to create a case note for that program. The screen below is a list of programs to select and populated under the **Programs** section. Click the Add Other Program button.

The Program screen opens. Select a program then click **Add**.

To create a case note, click on **Add New Case Notes**

The Note screen opens. Select a program that you are writing the case note.

Complete the case note for the desire program and click **Save**. The case note appears on the Other Programs tab, in the **Description** field.