IRIS IMMIGRATION & REFUGEE INFORMATION SYSTEM

IRIS
Resettlement Agency Staff Users' Guide

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Introduction

What is IRIS?

IRIS – the Immigration & Refugee Information System – is a web-based application designed to electronically assist in the processing and management of client cases between the Resettlement Agency (RA – aka VOLAG) national staff, each of the RA's affiliates, and the Refugee Processing Center (RPC). The benefits that are gained by use of IRIS include:

- Time savings
  - Affidavits of Relationship (AORs) processed and submitted more quickly
  - Case management time redirected from paperwork to working with clients
  - Shorter learning curve for new staff members
- Improved accuracy and timeliness of data collected and reported
- Centralized system means that data need only be entered once, rather than maintained in multiple systems.
- Access to IRIS – with appropriate permissions – from any Internet-connected computer

There are Production and Test instances of IRIS. The Test instances are used for testing and training. Production instances contain the live data. Production instances are identifiable by a blue header bar and Test instances contain a gold header bar with ***TEST*** displayed in it. You will see that we used both Production and Test instances of IRIS to capture our screenshots for this User Guide.

The Process

IRIS automates the following processes:

- Refugee Pre-Allocation Process
  - AORs
  - Interests
- Case Placement, Assurance, Travel, Arrival
- Resettlement and Placement (R&P) Program Case Management
- Matching Grant (MG) Program Case Management
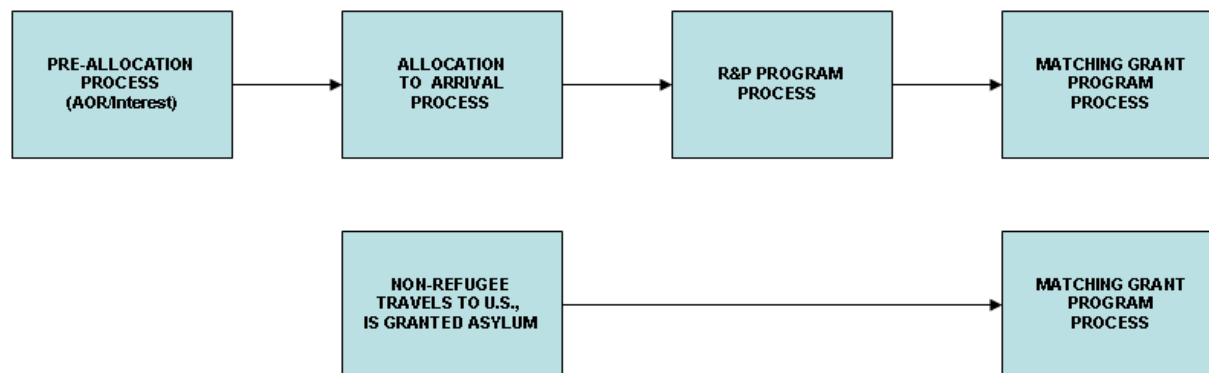
Each process will be detailed in the appropriate section within the User Guide.

Basics

If your IRIS account has already been established, you can skip down to the section titled "Logging On."

Setting Up Your IRIS Account

Once an IRIS administrator enters your name and security level into the system, you will receive an e-mail message inviting you to create your IRIS account. The message should look like the one below. Click on the link within the e-mail or copy the address and paste it into the address bar of your web browser.
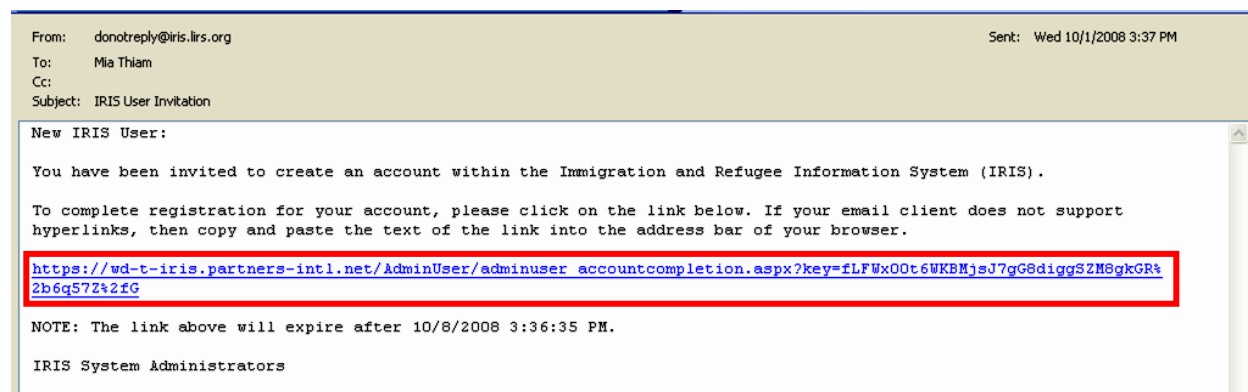
This will take you to the User Account Completion screen. Complete all **Required** fields, noting your Username and Password for future use.

Logging On

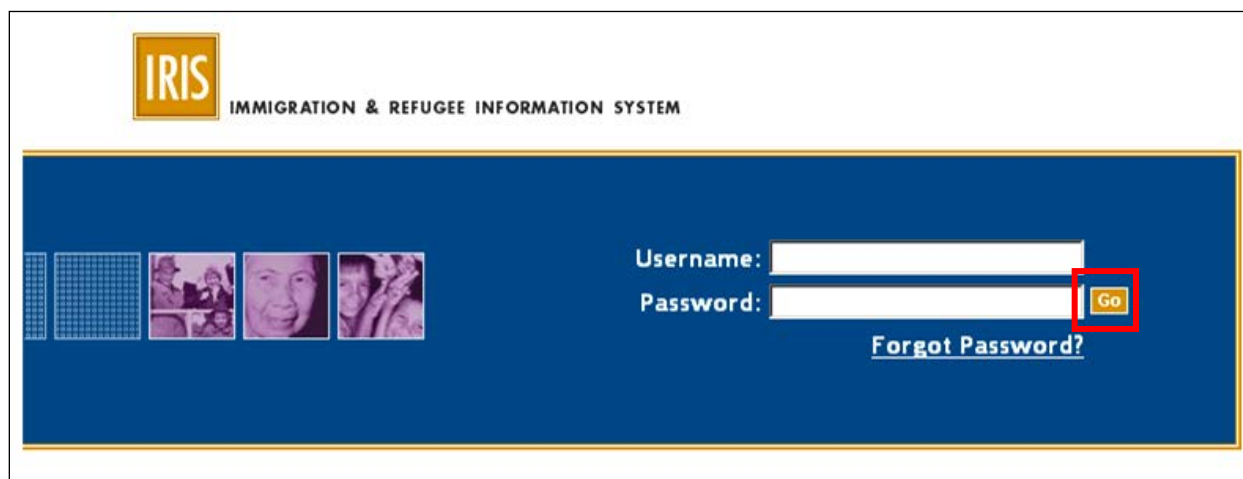IRIS is a web-based application, allowing authorized user's access from any location with internet access.

To logon to IRIS, launch your Internet Web browser software.

Now that the browser is opened, and depending on your computer's configuration, select the IRIS link from your **Favorites** or enter your agency's **web address** in the address bar. Contact your agency contact or IRIS Support for this address if you do not know it. Alternatively, you can go to **http://irisweb.org/** and select your agency's link from the list of agencies under the **IRIS LINKS** header.

Tip: Create a direct desktop shortcut to IRIS by left clicking and dragging your agency's URL to your desktop.

The Login page appears.
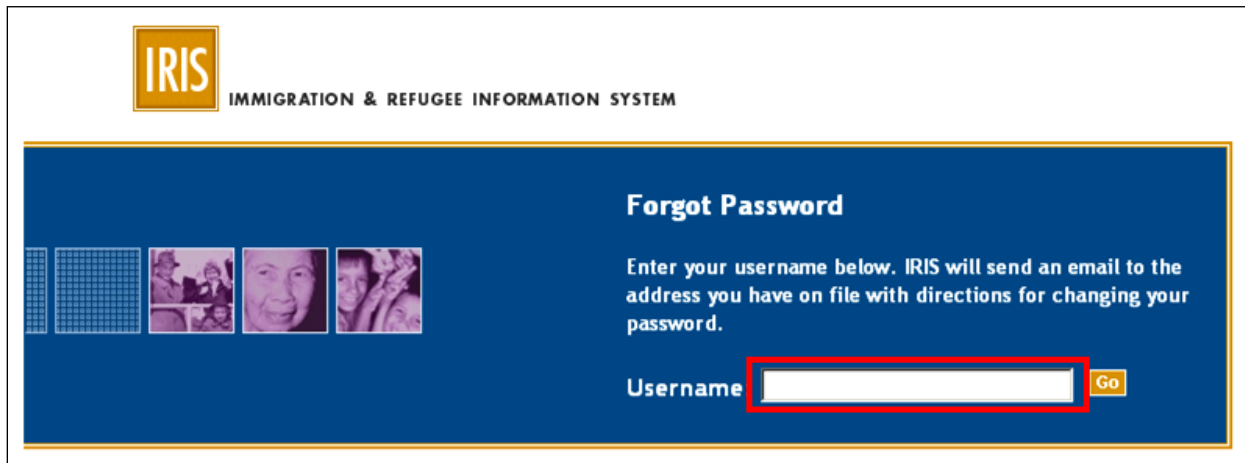

Enter your IRIS Username and Password, then click the **Go** button, or press the [Enter] key on your keyboard.
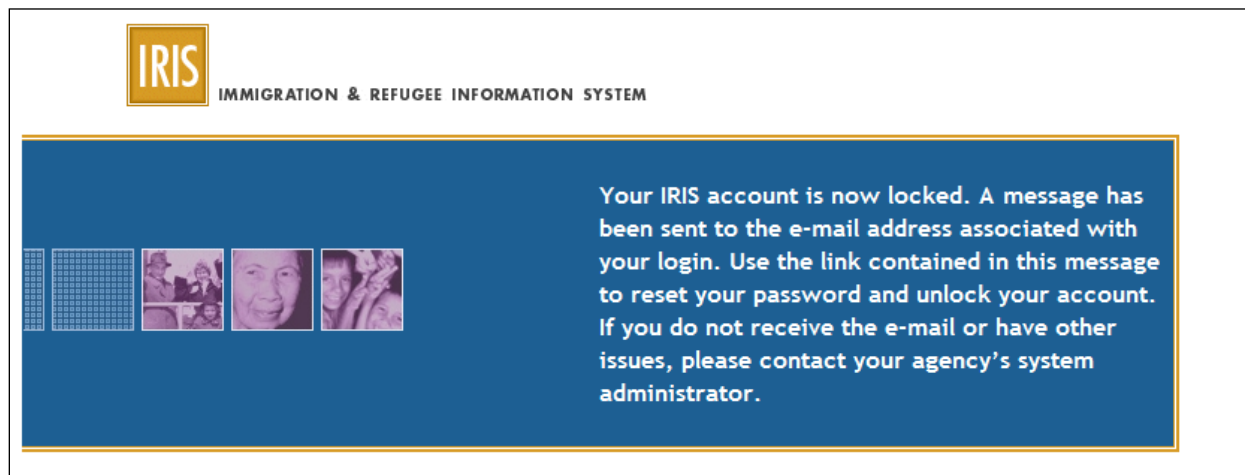
Forgotten Password

If you do not have, or cannot remember, your password, click on the **Forgot Password** link, where you will be prompted to enter your **Username** – a temporary password will then be automatically sent to the e-mail address associated with your IRIS login.

Locked Account

If an incorrect password is entered three times, the user account will be locked. The following message will appear:

If your login was successful, the IRIS Dashboard will be displayed.

IRIS Dashboard
The screen shot on the next page shows the **Dashboard,** or opening screen for IRIS.

1. The **Header Bar** appears at the top of every IRIS screen, staying with you as you navigate through the system. It allows users to perform common tasks and get basic information about the IRIS session.

2. On the left is the **Navigation Bar**. This is where you will see links to the functions assigned to you by the system administrator. What you see in the Navigation Bar is determined by your permissions. Your Navigation Bar may contain fewer links, or may contain additional ones, from those shown here. The functions will be described in detail throughout this guide.

3. On the right is the **Notifications Pane**. This is where you will see notifications triggered by various interactions with RPC or affiliate colleagues. These will alert you to tasks that need your attention. You will also receive some notifications by e-mail. Please see irisweb.org for a complete list of all online and e-mail notifications generated by IRIS.

4. A useful link under Notifications is the **Recently Viewed** section. It will allow you to bring up the ten most recently viewed AORs, Interests, or Cases that you as an individual user have worked with.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS LIRS

Welcome Darlene Boblooch

My Account | About | Logout

Notifications
Last Updated: 2/14/2013 2:48:32 PM

Pre Case Processing
- Advanced Search
- Receive Approved AORs
- Submit AORs

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- Reconcile Arrivals

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- MG Progress Report

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- Export WRAPS Files
- Configure WRAPS

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- Print Reports
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- Minor Reports Submitted (2)
- Minor Reports Corrections Needed (4)

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- R&P Period Reports Corrections Needed (2)

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- 90 Day Reports Submitted (15)
- 90 Day Reports Corrections Needed (2)

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- 180 Day Report Status Change (4)

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- WRAPS Assurance File Verification
- RP Period File Verification (54)
- Affiliate Data Submitted (8)
- Email Archive Report History (4888)
- Unknown WRAPS Codes

Recently Viewed
- AORs
- Interests
- Cases

Header

The header stays with you as you navigate through IRIS. From it, you may:
- Find any case you wish by entering the case number in the **Case Quick Search** box as shown below and then click **Go**.
- Return to the dashboard by clicking on the gold IRIS icon.
- Click on **My Account** to change your password or manage account information.
- Click on **About** to Identify which version of IRIS you are working in.
- Log out.

Case Management

Create Cases by Importing BioData

Importing Weekly Allocations WRAPS data files: from the IRIS Dashboard, click the link for "Load All WRAPS Files" in the WRAPS section:

Select the File Type (BIODATA), then click the Browse button:

Locate and select the appropriate BioData file and click the Open button:

Click the Start button to begin the import process:

While the import process is running, an animated box is displayed. This will disappear when the process is complete:

Once done, the WRAPS Import Summary screen is shown. If there had been any errors or warnings, there would have been a link to view the log of those. In this case, there were no errors:
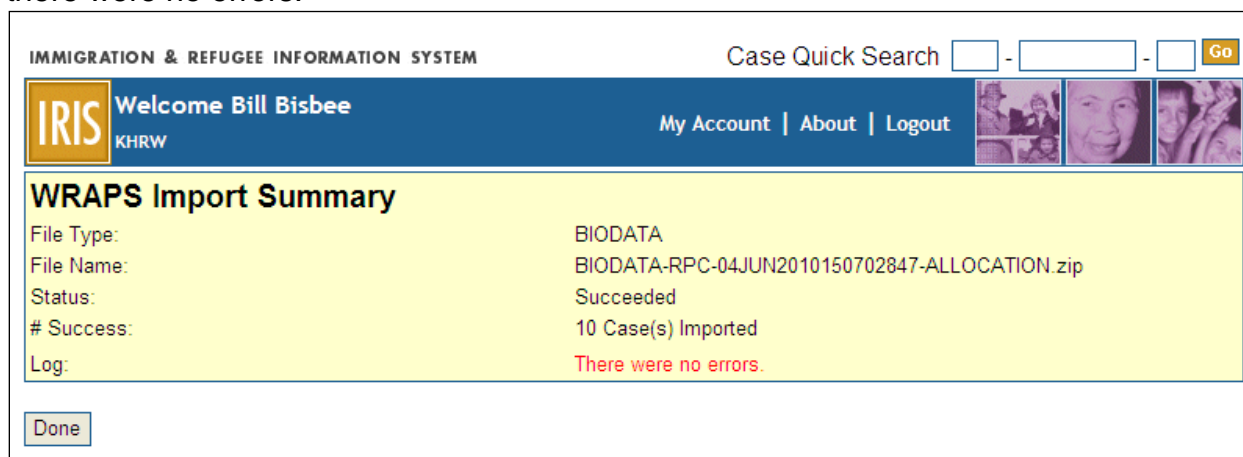
The next step is to import the Allocation Results file. From the WRAPS Import screen, select File Type (ALLOCATION-RESULTS)   , and then click on the browse button to locate the file:

Locate and select the appropriate Allocation Results file and click the Open button:

Click the Start button to begin the import process:

While the import process is running, an animated box is displayed. This will disappear when the process is complete:

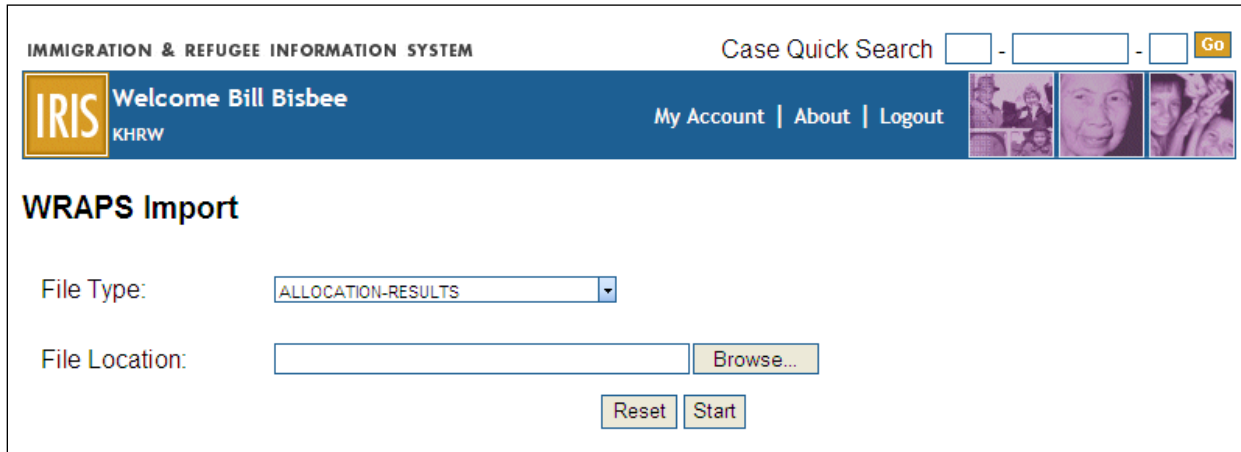Once done, the WRAPS Import Summary screen is shown. The Allocation Summary link opens a report with the basic information on all cases imported:

Once the weekly allocation of cases has been imported, the next step will be to place the cases. Cases may be placed individually from within each cases. When placing many cases at once, use the "Place Cases" link on the IRIS Dashboard (in the Case Management section).

When the Case Placement screen loads, it contains all cases that are not placed with an affiliate. This may include not only newly allocated cases, but those that have been returned by an affiliate, or those that were allocated previously but not placed.

When the Case Placement screen loads, it may also have some affiliate offices preloaded in the Affiliate dropdown. These indicate new cases that are cross-referenced to another case you have already placed at that office.

Some cases will appear in the same grid, with only a single affiliate selection. These indicate cross-referenced cases, which will be placed together – saving time and likelihood of error.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS Welcome Bill Bisbee
KHRW

My Account | About | Logout

Case Placement
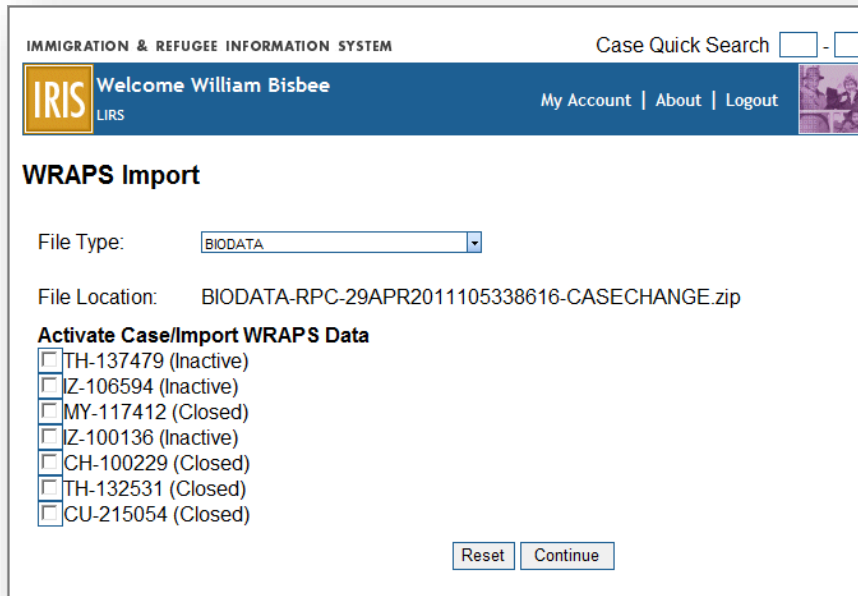
The following cases have not yet been placed:

Case Number	Active Status	Case Size	Pool	Affiliate	Transfer In	Details
CE-100119 CE-100118	Active Active	3 1	F F	[dropdown]	☐	Details Details
IZ-116617	Active	2	G	[dropdown]	☐	Details
IZ-116618	Active	6	G	[dropdown]	☐	Details
JO-122067	Active	2	P	[dropdown]	☐	Details
JO-122068	Active	3	P	[dropdown]	☐	Details
MO-100018	Active	2	F	[dropdown]	☐	Details
NP-128349	Active	4	F	[dropdown]	☐	Details
NP-128352	Active	2	F	[dropdown]	☐	Details
NP-128353	Active	2	G	[dropdown]	☐	Details

[Update Placement] [Print BioData Reports]

Importing BioData for Inactive or Closed Cases

When importing BioData, after you select the file name and click Continue, IRIS checks to see if there are any Inactive or Closed cases involved. If so, the following screen is displayed:

IMMIGRATION & REFUGEE INFORMATION SYSTEM   Case Quick Search ☐ - ☐

IRIS **Welcome William Bisbee**
LIRS   My Account | About | Logout
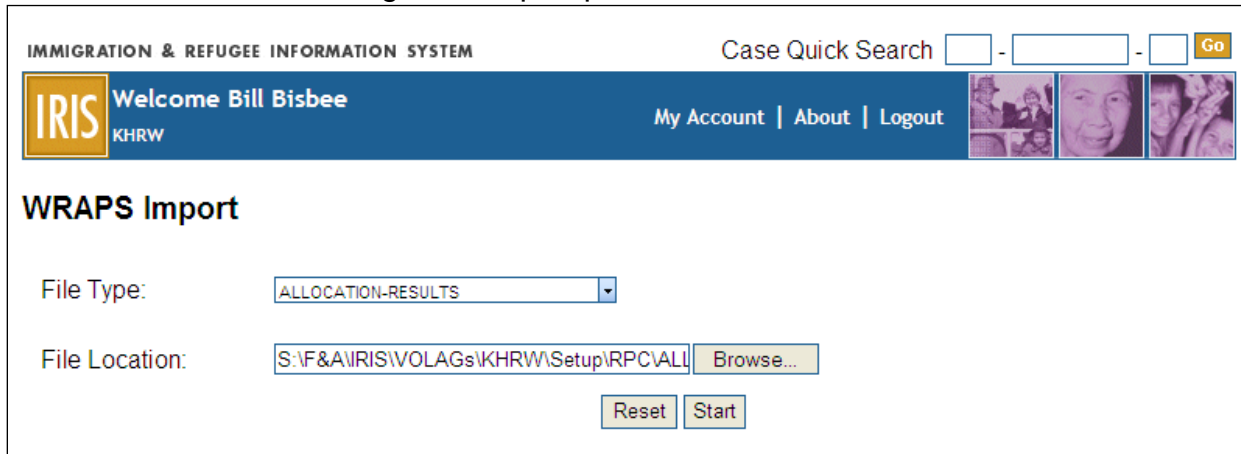
WRAPS Import

File Type: BIODATA   ▾

File Location: BIODATA-RPC-29APR2011105338616-CASECHANGE.zip

Activate Case/Import WRAPS Data
☐ TH-137479 (Inactive)
☐ IZ-106594 (Inactive)
☐ MY-117412 (Closed)
☐ IZ-100136 (Inactive)
☐ CH-100229 (Closed)
☐ TH-132531 (Closed)
☐ CU-215054 (Closed)

                    Reset   Continue

You can select any cases you want to be set to Active by checking the box next to the case number. Clicking Continue resumes the BioData import process.

Checking a previously Inactive case that *was checked* in the BioData import process to be reactivated shows that the case is now Active:

Checking a previously Closed case that *was checked* in the BioData import process to be reactivated shows that the case is now Active:

Checking a previously Inactive case that *was not checked* in the BioData import process to be reactivated shows that the case <u>remains Inactive</u>:

Checking a previously Closed case that *was not checked* in the BioData import process to be reactivated shows that the case <u>remains Closed</u>:

Updating Cases with the Weekly Caseload Data File

IRIS has the ability to import the Affiliate Case Load Report provided by RPC. RPC provides a data file version of the report as a comma-delimited text file. The file ends with a .csv extension.

Steps to import the file:
1. From the IRIS dashboard, click "Load WRAPS Files"
2. Select AFFILIATE CASE LOAD FILE from the list of import types
3. Click "Choose File" to upload the affiliate case load data file from your computer.
   a. Sample file name: "20170410 – [RA] Affiliate Caseload Datafile.csv"

The information in the caseload data file is matched to IRIS data by using the RPC Case GUID and the Principle Applicants Individual GUID. If a match is not found, then there is an error message. Other conditions such as a language code not found in IRIS will cause a warning message. The error message "Case with Number already exists" means the caseload file and the IRIS case matched using the GUID, however, the case number in the data file differed from the case number in IRIS.

The table below lists the data imported from the Affiliate Case Load Data File and the IRIS field that is updated.

Table 1. Data from Affiliate Case Load Data File and the field in IRIS that will be updated.

#	Data File Field	Descriptive Field Name	Sample Value	IRIS Mapping	Note
1	textbox276	Case Availability	Hold	IRIS Case=>Case Availability Status	
2	prefix_code	Case Prefix Code	CE	IRIS Case=>prefix_code	
3	case_number_split	Case Number	936732	IRIS Case=>case_number	
4	case_suffix	Case Suffix	A	IRIS Case=>case_suffix	
5	ind_firstname	PA First Name	FirstName	Case Member => [Relation to PA = Principal Applicant] => FirstName	
6	ind_middlename	PA Middle Name	MiddleName	Case Member => [Relation to PA = Principal Applicant] => MiddleName	

#	Data File Field	Descriptive Field Name	Sample Value	IRIS Mapping	Note
7	ind_surname	PA Surname	LastName	Case Member => [Relation to PA = Principal Applicant] => LastName	
8	ind_secondsurname	PA Second Surname	LastName2	Case Member => [Relation to PA = Principal Applicant] => LastName2	
9	nat_code	Nationality Code	AF	Case Member => [Relation to PA = Principal Applicant] => NationalityCode	
10	lang_code	Native Language Code	PBU	Case Member => [Relation to PA = Principal Applicant] => [NativeLanguage = Yes] => LanguageCode	
11	textbox610	Case Priority	SV	IRIS Case=>Case Priority	
12	textbox294	Case Status	IMM	IRIS Case=>Case Status	
13	textbox589	Cultural Orientation Status	NOA	IRIS Case=>Cultural Orientation Status	
14	textbox590	Cultural Orientation Hours	3Days	Field not in BioData IRIS Case=>"Cultural Orientation Hours"	Codes: 1. 1Day 2. 3Days 3. 4Days 4. 4Hour 5. 5Days 6. NSH
15	textbox568	Must Travel By	9/3/2014	Field not in BioData IRIS Case=>"Must Travel By"	

| #	Data File Field	Descriptive Field Name	Sample Value	IRIS Mapping	Note
		Travel Status			Codes: 1. Travel Reservations Received 2. Arrived in USA 3. Departed 4. External 5. IAC Cleared 6. IAC Requested 7. Not Arrived 8. Not Departed 9. No Activity 10. No Show 11. Pending Acceptance 12. Provisional Travel Certificate Requested 13. Travel Reservations Requested 14. Removed 15. Request Sent to RPC
16	textbox301		STO	Field not in BioData IRIS Case=>"Travel Status"	16. Start Over

Updating Cases with the Agency Case Closure Data File

IRIS has the ability to import the Agency Case Closure Data File that is provided by RPC.

The following steps describe the import process.

1. Import the data file from "Load WRAPS Files" screen
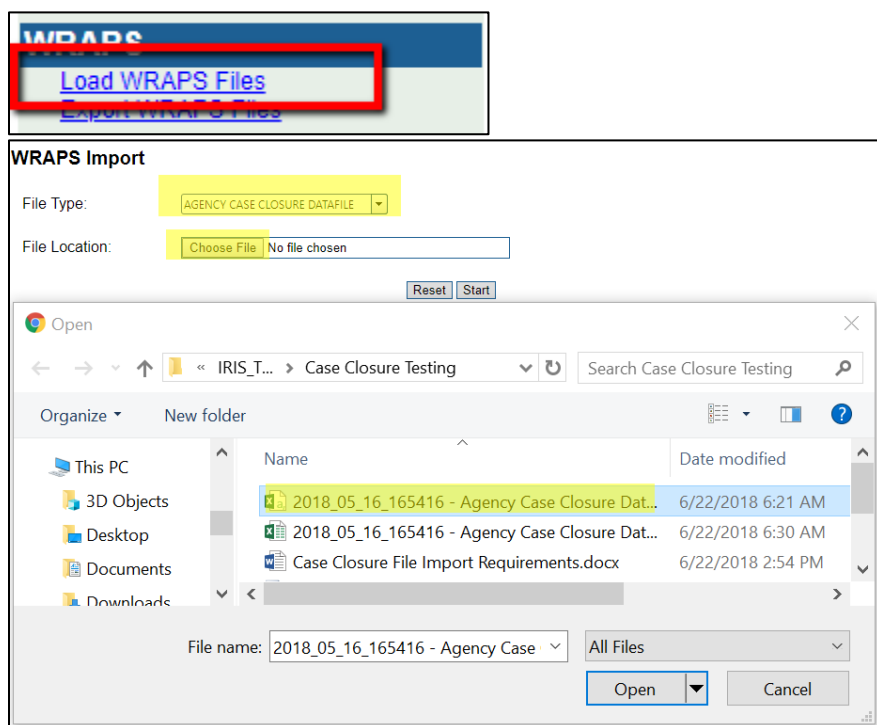
2. IRIS cases that match the case on the import file will have their Status changed to Closed
3. A case note will be added for each closed case.

During the import IRIS checks the data and may provide an error or warning message. Error means an update did not occur. A warning message updates IRIS and only makes you aware of a condition.

Error Message	Condition
Bad line format. Line in data file must have comma separators	CSV file row does not match CSV file format

IRIS case not found by case load file RPC case GUID	Case GUID from CSV file was not found in IRIS database.
RPC case GUID matched. Case number does not match	Case GUID from CSV file was found in IRIS database DB, but Case number does not match
Case is already closed	Case Active Status equals to Closed

Warning Message	Condition
Empty ClosureReason field	CSV file row ClosureReason field is empty

Accessing Cases

In addition to the Case Quick Search and Recently Viewed links discussed in the Dashboard section of this guide, you may also access cases by clicking on the **Advanced Search** link under Case Management on the Navigation Bar. Please note that there is also an Advanced Search link under Pre Case Processing, so be careful to choose the correct link.

This will provide you with a wide variety of search options, as shown on the next page.

You may fill in as many of the criteria on this page as you wish. When finished, scroll to the bottom and click the **Submit** button. The more information you enter, the more you will refine your search.

If you want to see all the cases you have access to see, click **Submit** *without entering any search data.*

Once you have clicked the **Submit** button, the Search Results page will appear. Here, you can review the cases that match your criteria. To open a particular case, click on the link associated with that case number on the left side of the page.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS LIRS   Welcome VALERIE RHODES

My Account | About | Logout

Search Results

Displaying 1 - 20 of 46317 Result(s) (OR) Display [20 ▾] results per page.

[First Page][Previous Page][Next Page][Last Page]

Case Number	Active Status	PA Name	Case Size	Case Type	Pool	Birth Date	Date of Arrival	Affiliate Placement	MG Enrollment
A -0000000	Active	WARD, FREDDIE	2	Other VOLAG Refugee		12/20/1970	6/28/2012	MALIRS03	
A -000000001	Active	WAGNER, ISAAC	3	US Citizen (born to Refugee)		11/13/2000	1/20/2012	MALIRS03	
A -000586838	Active	WATSON, BRADLEY	3	Secondary Migrant		10/29/1979	12/13/2011	SCLIRS01	Yes
A -059884627	Active	PAYNE, RONALD	2	Secondary Migrant		6/2/1971	11/30/2011	MALIRS01	
A -060202954	Active	RODRIGUEZ, TOM	1			2/1/1986	9/18/2008	VALIRS01	Yes
A -060880599	Active	SUTTON, CHRISTIAN	2	Other VOLAG Refugee		9/1/1979	10/13/2009	MALIRS03	

Case Screens

Case Header

The top of each Case screen contains the Case Header, which gives summary information for the case. It appears on every screen you navigate to within the case.

If a case has not yet arrived, the Projected Arrival Dates will appear on the Case Header as seen below.

Case ID:	CU-064045	Case Size:	2	Allocation Date:	9/6/2012
Case Type:	Refugee	Processing Status:	Not Assured	Assurance Date:	
Case Pool:	Geo	Active Status:	Active	Projected Arrival From:	12/20/2012
Affiliate:	17D - FL-Miami			To:	3/20/2013
PA Name:	DAY, DEBRA			Enrolled Programs:	R&P

Once a case has arrived, the Arrival Date and MG Enroll Date fields will be displayed with any pertinent data as seen below.

Case ID:	NP-128329	Case Size:	1	Allocation Date:	11/9/2011
Case Type:	Refugee	Processing Status:	Arrived	Assurance Date:	11/15/2011
Case Pool:	Geo	Active Status:	Active	Arrival Date:	3/7/2012
Affiliate:	05 - CO-Denver			MG Enroll Date:	3/12/2012
PA Name:	BENNETT, TYRONE			Enrolled Programs:	R&P,MG

Case Tabs

There are five main subsections of tabs within a Case: **Pre Arrival**, **Post Arrival**, **VOLAG** (RA) **Notes, Matching Grant** and **Other Programs**. **The top of the tabs for the subsection you are in will be highlighted in gold.** Some of the choices that are available in the main subsections are shown below. Others become available once you click on a lower tab – these will be discussed as the section is explored in further detail in this guide.

Pre Arrival	Post Arrival	VOLAG Notes	Matching Grant	Other Programs
RPC BioData	Placement	Assurance	Pre-Case Documents	Travel
Case		Member		Cross Reference

Placing Cases

There are two ways to place a case in IRIS: from the Place Cases link on the Dashboard or from within the individual case. Use the Place Cases link if you would like to place more than one case at a time. Use the Case screen for an individual case if you want to place just that case, or if you need to update a previous placement for that case.

Place Cases Link

To begin, click on the **Place Cases** link on the Navigation Bar under **Case Management**.

This will bring up a list of cases which have not yet been placed, as shown in the screenshot below. If there are any URM cases on the list, these will be sorted at the bottom and shaded in beige. Also, returned cases will display shaded in green. You may see possible anchors by clicking on the **Details** button.

To view biodata for the cases that need to be placed, click on the link associated with the case number.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS **Welcome ALAN WEAVER**
LIRS

My Account | About | Logout

Case Placement

The following cases have not yet been placed:

Type	Case Number	Assurance Due Date	Case Size	Pool	Affiliate	Transfer In	Details
New	DJ-106438	1/24/2013	4	F	[▼]	☐	Details
Returned	TH-151285	2/6/2013	1	F	[▼]	☐	Details
Returned	AF-946334	2/22/2013	1	G	[▼]	☐	Details
URM	TU-390965	2/6/2013	1	P	[▼]	☐	Details
URM	CD-120326	2/13/2013	1	P	05 - CO-Denver ▼	☐	Details
URM	CD-120327	2/13/2013	1	P	05 - CO-Denver ▼	☐	Details

[Update Placement]   [Print BioData Reports]

Biodata

Clicking on the Case Number will bring up the **Background Case Information** screen. You may edit this information as necessary by clicking on the one of the **Edit** buttons at the top or bottom of the screen.

Once you click **Edit,** you will have the ability to make changes, by clicking on one of the dropdown lists or typing in the appropriate field. When finished, click **Submit.**

Members

To work with individual members of the case, click on the **Member** tab.

From the **Case Members** screen you may:
- View biodata for an individual by clicking on the link associated with that person's Alien ID number.
- Move members from one case to another, split a case, or add a Member. This is usually done through a WRAPS import, but if you need to do it manually, please see page 78.
- Print the biodata report.

Background

When you click on the link for a particular member, the **Member Background** page for that person will open. You will also see tabs for Health, Language, Education, and Employment. As with the Background Case Information discussed above, the page becomes fillable when you click the **Edit** button at the bottom of the screen. The process is the same as that described above for the Background Case Information.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search [____] - [____] - [__] [Go]

IRIS LIRS

Welcome VALERIE RHODES

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Case ID:	MY-127293	Case Type:	Refugee		
Alien Number:	233999058			Gender:	M
First Name:	ALEX	Middle Name:			
Surname:	GRAY	Surname 2:			
Maiden Name:					
Date of Birth:	1/1/1990	Relationship to PA:	Principal Applicant	Minor Code:	
Deceased:	No	Date of Death:		Notice Received:	

[Background] [Health] [Language] [Education] [Employment]

Member Background

Alien Number:	233999058	WRAPS Sequence Number:	1
		UNHCR Sequence Number:	1
Individual GUID:	7A175C46-096A-4F03-B286-967619AFD126	Relationship to PA:	Principal Applicant
First Name:	ALEX	Middle Name:	
Surname:	GRAY	Second Surname:	
Maiden Name:		Minor Code:	
Gender:	Male		
Date of Birth:	1/1/1990	Date of Birth Estimated:	N
Birth City:	Sittwe Township	Birth State:	ARAKAN
Birth Country:	Burma		
Main Email Address:			
Is Deceased?	No	Date of Death:	
Notice Received:			
Marital Status:	Single	Number of Marriages:	0
Nationality:	Burma	World Region:	Need field for this.
Ethnicity:	Rohingya	Citizenship:	Stateless Citizenship
Passport Country:		Passport Number:	
		National ID:	
Current Location:	Kuala Lumpur	Current Country:	Malaysia
Last City of Residence:			
Status:	Case Member		
Religion:	Moslem		
INS Interview Status:	Granted Refugee Status	Cultural Orientation Status:	CO Training Requested
Minor Questionnarie:		Remark:	

Custom Fields

[Edit]

Health

Below is an example of a Health biodata page.

You may add or change **HIV** information by clicking in the appropriate circle and then clicking **Save**.

To update the **Medical Status**, click on the dropdown arrow and choose the status you need. Then click **Save**.

You may add specific health details by clicking on the **Add Health** button.

When you click on the **Add Health** button, a dialog box will open, as shown on the next page. Fill in the required information, using the dropdown lists where they are provided. Once you have completed the form, click the **Save** button.

The information you entered will now appear on the member's Health Information page. Please note that the **Source Name** here is a code associated with the Source Name you entered in the dialog box above.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS LIRS

Welcome VALERIE RHODES

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Case ID:	MY-127293	Case Type:	Refugee		
Alien Number:	233999058			Gender:	M
First Name:	ALEX	Middle Name:			
Surname:	GRAY	Surname 2:			
Maiden Name:					
Date of Birth:	1/1/1990	Relationship to PA:	Principal Applicant	Minor Code:	
Deceased:	No	Date of Death:		Notice Received:	

[Background] [Health] [Language] [Education] [Employment]

Health Information

Class A Medical Condition: ○ No ○ Yes

Medical Status: [Medically Cleared ▼]

[Save]

Source Name	Date Added	General Health	Treatment	Treatment Urgency
OF-157	11/20/2012	Diabetes	Individual should follow up with Physician/Specialist after arrival	Within 4-6 weeks post arrival
	Patient was diagnosed with diabetes.			
OF-157	7/26/2012	Other	No Post Arrival Treatment needed	None
	comments comments			

[Add Health]

Language, Education, and Employment

The language, education, and employment pages provide information on these topics for the individual member. Below are examples of each page. As with the health screen, you may add information by clicking on the **Add** button. The process is the same as that described in the **Health** Section above.

Background	Health	Language	Education	Employment

Language History

Language	Proficiency Levels			Native Language?
	Reading	Speaking	Writing	
Arakan - Major dialect Rakhine and Arkan States	Good	Good	Good	No
Burmese	Good	Some	Good	No
	U			
English	Good	Some	Good	No
	U			
Malay	Good	Good	Good	No
Rohyingya - Major dialect; increased caseload expected	None	Good	None	Yes

Add Language

Background	Health	Language	Education	Employment

Education History

Overall Education Level: Secondary ▾

Save

School Name	Field of Study	School Address	Country	Level	Start Date	End Date	Degree
No.5 Sittwe High School	10th Standard	54 Maple Lane	Brazil	Secondary	1/1/1994	1/1/2003	

Add Education

| Background | Health | Language | Education | Employment |

Previous Employment and Skills

Occupation	Country	Start Date	End Date	Employer	Employment Type
Construction Worker	Georgia	3/2/2011		Chinese Employer	Employment Record
Factory Worker	Iceland	3/2/2008	3/2/2009	Steel Factory	Employment Record
Construction Worker	Tanzania	3/2/2009	3/2/2011	Malay Employer	Employment Record
Construction Worker	Montenegro	3/2/2007	3/2/2008	Chinese Employer	Employment Record

Add Employment

Printing the Biodata

If you would like to print out a hard copy of the biodata, you may do so from either the Case Members or Case Placement screen.

From the Case Members screen
Click on the **Print Biodata Report** button.

A PDF document will open, allowing you to save or print the file.

Lutheran Immigration And Refugee Service
BIODATA FORM

Case Number: MY-127293
Principal Applicant: GRAY, ALEX
Case Size: 1
Anchor Relative:
Pre-Case Document:
Case Type:
Urgency Level:
Affiliate:
Allocation Date:

Page 1 of 4

From the Case Placement Screen
Click on the **Print Biodata Reports** button.

A PDF document containing biodata for all of the cases that need to be placed will open. This could be quite a large file, depending on the number of cases you have to place. You may save or print the file or selected pages.

Placing the Case

Now that you have reviewed the biodata, you are ready to place the case. Returning to the Case Placement screen, click on the dropdown arrow in the Affiliate column and choose the affiliate where you will place the case. To streamline the process, you may select affiliates for as many cases as you wish. When finished, scroll down to the bottom of the page and click **Update Placement.**

Once you have completed the process, IRIS will remove the cases you have placed from the **Case Placement** Page.
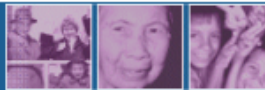
The affiliate office will receive two online notifications: **NEW Cases** and **ALL Cases To Be Assured.** The NEW Cases notification lists all cases newly placed with the affiliate and will remain for three days after placement. The **ALL Cases To Be Assured** notification lists all cases that need to be assured. A case will remain on this list until it has been assured. IRIS will generate an **Assurance Date Passed** notification if the case is not assured on time.

Placement information will appear on the **Current Placement** screen within the cases you have placed. Please see the next section for instructions on how to view this screen.

Placing a Case from within the Case Screen

To place a case or update a placement from within the Case Screen, locate and open the case you wish to place. Click on the **Placement** tab.

The Placement Screen will open. If the case has already been placed, the information will appear here. Click on the **Placement** button.

A dialog box will open. Fill in the required information and click **Save.**

The placement information you entered now appears on the Current Placement screen and the **History** chart details your recent activity. The Placement button's label has changed to **New Placement** giving you the ability to change the placement should you need to in the future.

Current Placement

Placement Date:	12/2/2012
Current Placement Location:	WALIRS01: Lutheran Community Services Northwest - Seattle, WA-Seattle
Updated By:	VALERIE RHODES
Updated Reason:	Initial Placement
	New Placement
Case Location Preference:	

History

Placement Date	Location Code	Location	Changed By	Comments
12/2/2012	WALIRS01	Lutheran Community Services Northwest - Seattle, WA	VALERIE RHODES	Initial Placement

Adding a VOLAG Note

Open the case and click the **VOLAG Notes** tab. Then click the **Add New Case Notes** button.

A dialog box similar to that shown on the next page will open. Choose the **Case Notes Type** (R&P or MG) from the dropdown**.** Indicate whether or not the note includes sensitive medical information by clicking either Yes or No in the radio buttons next to **Contains Restricted Medical Information**. Add a **Short Description** and a **Note**. The **Note Date** will default to current date, but it can be changed to a prior date. If you want the affiliates to be able to see this note, click the **Viewable by Affiliates** checkbox.

You can save the note as a draft by clicking **Save Draft**. It will not become viewable by the affiliates until you click **Save**.

The affiliate office will receive an online notification that a VOLAG Note has been added.

The note will be viewable from the VOLAG Notes tab within the Case Screen. To open it, select the VOLAG Notes tab and then click on the link associated with the short description.

The dialog box where you entered the note will reopen. You may edit or remove the note as necessary by typing more information in the **Note** field or clicking the **Remove** button. You can also upload any documents pertaining to this note by clicking the **Browse** button to locate the document and then clicking the **Add Document** button. IRIS will record the date the note was updated. Finally, click the **Save** button to save and close the note.

Assurance

To view the Assurance Status and other information relevant to the assurance process, click on the **Assurance** tab.

Assurance Details

This is the main assurance screen. From here, once the affiliate has assured the case, you will finalize and submit the assurance to WRAPS.

The Target Assurance Date is the assurance due date, set by IRIS based on the BioData Urgency Code for this case. Generally, it is 4 weeks from the allocation date.

Assured Date will be blank if this is a new assurance, but may be populated if you are reassuring the case.

Assurance Status will be one of the following:

Requested – you have requested assurance from the affiliate.

Ready to Assure – the affiliate office has completed the assurance and submitted it to the RA.

Assured – the RA has signed off and

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS Welcome VALERIE RHODES

My Account | About | Logout

Case ID:	ET-130481	Case Size:	1	Allocation Date:	6/15/2011
Case Type:	Refugee	Processing Status:	Arrived	Assurance Date:	
Case Pool:	Free	Active Status:	Active	Arrival Date:	9/25/2012
Affiliate:	11 - MN-Minneapolis			MG Enroll Date:	
PA Name:	PETERSON, ROGER			Enrolled Programs:	R&P

Pre Arrival | Post Arrival | VOLAG Notes | Other Programs
RPC BioData | Placement | Assurance | Pre-Case Documents | Travel
Assurance Details | Anchors | Co-Sponsors | Assurance Forms

Assurance

Target Assurance Date: 6/29/2011   Assured Date:
[Waive/Inactive]   Assurance Status: Ready To Assure
[Print]

Case Members

Name	Relationship to PA	Class A Addendum Required	Minor Code	Suitability Determination Required	Suitability Determination Received
PETERSON, ROGER	Principal Applicant	No		N/A	N/A

Co-Sponsors

Status	Name	Placement Exception Required	Placement Exception Received	V93 Validation	Primary

☑ Assure this as an Agency Sponsored Case

Present Location:
Placement Office: Lutheran Social Services of Minnesota - Minneapolis
Placement City: Minneapolis
Placement State: MN
Placement Code: [0   ▼] - [0   ▼]

Case Members lists the members of the case and shows if additional information – Class A Addendum or Minor Suitability Determination is needed to assure the case.

Anchors shows the confirmed anchor, if you are working with a GEO case.

Co-Sponsors shows any sponsoring organizations or individuals.

If the affiliate has assured a free case with no anchor or local sponsor, the "Assure this as an Agency Sponsored Case" box will be checked. This will allow the assurance to be submitted without entering a confirmed anchor or co-sponsor.

Present Location is pre-filled from the case information.

Placement Office was filled when you placed the case.

submitted it to RPC via WRAPS.

Waived – an Assurance Waiver has been submitted.

Inactivated – an Assurance Inactivation has been submitted.

Placement State is the state where the case will be placed. For agency sponsored cases, IRIS will pre-fill this with agency state.

Placement Code is an outdated function. It is set to 0-0 by default.

Final Destination is the airport where the case members will be picked up when they arrive.

Special Instructions are added if you need to request more information from the affiliate before the case can be assured.

Other Bio Information can be added by affiliate agency to provide information to RPC or the RA regarding the assurance.

When you have reviewed this page and are ready to submit the assurance, check the radio button stating "**I confirm all of the information is correct and this case is assured**" and then click the **Assure** button.

If additional work is need on this case by the affiliate, click the radio button stating "**This case is not ready to be assured and should be returned to the**

Placement City is the city where the case will be placed. For agency sponsored cases, IRIS will pre-fill this with the placement office city.

Present Location:	
Placement Office:	Lutheran Social Services of Minnesota - Minneapolis
Placement City:	Minneapolis
Placement State:	MN
Placement Code:	0 ▼ - 0 ▼
Final Destination:	MSP - Minneapolis/St. Paul Int'l ▼ ALERT: Current IOM Final Destination = DFW: Dallas/Fort Worth Int'l
Special Instructions:	Amended: Stateside Xrefs moved to Minneapolis. ET-131360 Omer Nima ET-130471 Hussein, Amina 2022 Park Ave, South #203 Minneapolis, MN 55404 651-500-1879
Other Bio Information:	

○ I confirm all of the information is correct and this case is assured.
○ This case is not ready to be assured and should be returned to the affiliate for review.

[Assure] [Restore Previous Assurance] [Save]

Fields marked by an asterisk (*) are required.

Assurance History:

Date	Status	Reason	ChangedBy
9/20/2012	Ready To Assure		GERALD FOSTER
9/20/2012	Requested	New Case Placement new assurance	HILDA WEAVER
7/5/2012	Assured	Reassured by VOLAG (Special Instructions changed)	JONATHAN RUIZ
6/21/2011	Assured		JONATHAN RUIZ
6/21/2011	Ready To Assure		ANTONIO WADE
6/15/2011	Requested		

You can save the form without submitting it by clicking on the **Save** button.

A record of this case's assurance(s) can be viewed in the section titled **Assurance History** at the bottom of the screen.

affiliate for review" and click
Save.

Assuring a Case

Once you have placed a case, the affiliate office will see a **NEW Cases** link on the Dashboard. If the case has not been assured at least 30 days before the due date, a reminder notification labeled **Assurance Date Approaching** will populate on the Dashboard**.** A third notification will appear if the due date passes, alerting you that the **Assurance Date has Passed**.

Once the affiliate has assured the case, the **Assurance Ready** Notification will populate on your Dashboard. Click on the link to see all of the cases ready to be assured.

Now, click on the link for the case you wish to assure.

When the case screen opens, click on the **Assurance** tab. Note in the example on the next page that since the affiliate has assured this case, the Assurance Status now reads **Ready to Assure**. Check to see that all of the information is correct.

If there is a problem, check the checkbox **This case is not ready to be assured and should be returned to the affiliate for review**. Include notes about why you are returning the case in the **Special Instructions** box. Then click **Save**. It is also a good idea to send a VOLAG Note when returning a case because this will generate a notification for the affiliate. Please see page 66 for instructions on how to add a VOLAG Note.

When you are ready to assure the case, check the checkbox **I confirm all of the information is correct and this case is assured;** then click **Save**. IRIS will add this assurance to the WRAPS file ready for export to RPC. Note that the Processing Status and Assurance Status are now both **Assured**.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

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

IRIS LIRS — Welcome VALERIE RHODES

My Account | About | Logout

Case ID:	TH-108992	Case Size:	5	Allocation Date:	8/29/2012
Case Type:	Refugee	Processing Status:	Assured	Assurance Date:	12/3/2012
Case Pool:	Geo	Active Status:	Active	Projected Arrival From:	11/1/2012
Affiliate:	21 - PA-Philadelphia			To:	1/30/2013
PA Name:	CARROLL, VIRGIL			Enrolled Programs:	R&P

Pre Arrival	Post Arrival	VOLAG Notes	Matching Grant	Other Programs
RPC BioData	Placement	Assurance	Pre-Case Documents	Travel
Assurance Details	Anchors	Co-Sponsors	Assurance Forms	

Assurance

Target Assurance Date: 9/26/2012

Assured Date: 12/3/2012

[Waive/Inactive]

Assurance Status: Assured

[Print]

Case Members

Name	Relationship to PA	Class A Addendum Required	Minor Code	Suitability Determination Required	Suitability Determination Received
CARROLL, VIRGIL	Principal Applicant	No		N/A	N/A

Exporting WRAPS Files

When you are ready to export the WRAPS file, return to the dashboard and click **Export Wraps Files**, as shown on the next page.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search ⬜ - ⬜ - ⬜ **Go**

IRIS **Welcome VALERIE RHODES**
LIRS

My Account | About | Logout

Pre Case Processing
Advanced Search
Receive Approved AORs
Submit AORs

Case Management
Advanced Search
Place Cases
Transfer a Case
Search Case Transfers
Manage Travel
Reconcile Arrivals

Travel Loan
Export Loan System Files

R&P Reporting
R&P Period Report Console
Minor Report Console

Administration
User Maintenance
Affiliate Maintenance
MG Program Maintenance
Group Maintenance
E-Mail Announcements
Form Template Maintenance
All Forms
Custom Fields Maintenance
Per Capita Maintenance
End User License Maintenance

Matching Grants
MG1 Enrollment Report
MG Expense Reports
MG Management Console
MG Progress Report Summary
MG Progress Report

WRAPS
Load WRAPS Files
➡ Export WRAPS Files
Configure WRAPS

Reports
Ad-hoc Reports
Print Reports
ASAR Reports

Notifications   Last Updated: 12/3/2012 11:49:14 AM

Pre Case Processing
AORs Approved To Send
AOR Submitted
NEW AOR Notes (4)

Case Composition Alerts
Split Cases (23)

R&P Pre-Arrival
ALL Cases To Be Assured (316)
Assurance Date Approaching
Assurance Date Passed (314)
Assurance Inactivated (1)
Assurance Ready (18)
Cases Returned by Affiliate (2)
NEW Cases
Unassured Placement Exceptions

Pre-Arrival Minor Reports
Minor Reports Due (3)
Minor Reports Submitted (28)
Minor Reports Corrections Needed (4)

Travel
Arrival Date Approaching
NEW Travel Info
No Final Booking
View Unmatched Travel (1)
View eABN Imports

R&P Period Reports
R&P Period Reports Due (1158)
R&P Period Reports Submitted (118)
R&P Period Reports Corrections Needed (7)

R&P Minor Reports
Post Suitability Due (7)
Post Suitability Submitted (13)
Post Suitability Corrections Needed (2)
90 Day Reports Due (15)
90 Day Reports Submitted (3)
90 Day Reports Corrections Needed

Matching Grant
120 Day Report Due (445)
120 Day Report Status Change
180 Day Report Due (324)
180 Day Report Status Change

General
Email Archive Report History (11)
NEW VOLAG Notes
WRAPS Assurance File Verification (8)
Affiliate Data Submitted (6)
RP Period File Verification (329)

Recently Viewed
AORs
Interests
Cases
Unknown WRAPS Codes

Choose **Export Assurance Files** from the dropdown and click **Start**.

IRIS reflects that the file has been sent by e-mail to RPC and the Processing staff at your agency. Older cases are sent to a WRAPS email address. Newer cases are sent to a START email address. RPC will confirm receipt of the assured cases by e-mail.

Reassuring a Case

You may be asked to reassure a case in one of the following circumstances:
- A case has been assured for one year
- The composition of a case changes
- Medical information has been added
- The anchor's address changes, or a new co-sponsor for the case is identified
- RPC requests reassurance of a case

The process for reassurance is the same as that for assurance.

The functionality and reason for use of the three buttons on the Assurance screen of an assured case are described below. Note that use of the "Request Amended Assurance" and "Reassure Now" buttons are prompted by a request from RPC to reassure a case via the Amended Assurance Request that the RAs receive from RPC each week.

Request Amended Assurance button

Functionality
- RA is prompted for a new Target Assurance Date and an Amended Assurance Request Reason.
- Processing Status goes back to "Not Assured" and Assurance Status goes back to "Requested."
- Case is added to notifications like "ALL Cases To Be Assured" and possibly "Assurance Date Approaching" (depending on Target Assurance Date that was entered). Both the RAs and the affiliates have these two notifications. The grids in both notifications contain an "Assurance Type" column. In both instances the type would be "Amended" when an RA has requested an amended assurance.
- This case would go through the assurance process again, where the affiliate has to possibly identify/confirm an anchor and accept placement. Once the affiliate does that, the Processing Status is still "Not Assured" but the Assurance Status changes to "Ready To Assure." Also, the case has now been added to the RA's "Assurance Ready" notification. Then, once the RA assures the case, the Processing Status and the Assurance Status will both be changed to "Assured."
- No VOLAG Notes are created.
- Assurance DOES get sent in WRAPS Assurance Export.

Reason for use
- RA was notified of a change via the weekly Amended Assurance Request that does require the affiliate to re-accept the placement.

Reassure Now button

Functionality
- Fast track to reassure case. Skips accept/approve process with affiliate.
- No dashboard or e-mail notifications are created for RAs or affiliates.
- No new VOLAG Note is created.
- Processing Status and Assurance Statuses both stay "Assured."
- RA is not prompted to enter any information in the Special Instructions box, **although the reason for reassuring the case should be entered there before clicking the button**.
- A row is added to the Assurance History grid with a Reason of "Reassured by VOLAG" and the user's name is added in the ChangedBy column.
- Assurance DOES get sent in WRAPS Assurance Export.

Reason for use
- RA was notified of a change via the weekly Amended Assurance Request, but it does not require the affiliate to re-accept the placement. RA would note change in Special Instructions and just "Reassure Now." RPC would receive the reassurance and see the reason for it in the Special Instructions.

Note: Although the affiliate does not get notified of this transaction, when/if RPC sends updated biodata, the affiliate will be notified via an e-mail and a dashboard notification. The affiliate is notified via an e-mail whenever a new VOLAG Note was created, including when data changes during a biodata import. So, the e-mail isn't going to look any different than any other biodata upload. However, when the affiliate opens the e-mail or the VOLAG Note, s/he will be able to see the name of the biodata that was run. If it's a Case Change, those words will be embedded in the name of the biodata.

<u>Save button</u>

Functionality
- Saves whatever changes were made to the data on the Assurance screen.
- Does not do anything else; i.e. no notifications are created, no VOLAG Note is created, no statuses are changed, no entry is made to the Assurance History grid, etc.
- Assurance does NOT get sent in WRAPS Assurance Export.

Reason for use
- A minor change was needed on the Assurance screen that did not require the case to be sent to the affiliate or RPC.
- A scenario describing how one RA typically uses this button is as follows:
  - The RA uses the Save button if they need to remember to make a comment but they are waiting for the affiliate to assure the case; for example—the case is assured to Minneapolis and the affiliate tells them the UST has moved to St. Cloud. The RA sends the updated UST form to RPC and moves the case to St. Cloud, but the RA will not assure the case

without the affiliate's confirmation. The RA doesn't want to forget what they did, or for another case worker in the office to come behind them not knowing why the case was moved, so they save a comment that says Amended: UST moved to St. Cloud.

Splitting a Case

Most of the time, changes to biodata will be imported from WRAPS. However, in the event that you need to split a case manually you may do so by going into the Member tab and clicking on the **Split Case** button.

Add the new case number generated by the split. Click **Enter.**

Select the reason for the split from the dropdown and add any comments in the field provided. Click **Enter**.

Check the box for the members you wish to move to the new case and then click **Move Selected Members to New Case.**

The members of the new case will now appear in the **New Case Number** Chart. If you have made any mistake, you may move members back to the original case by selecting them and then clicking **Move Selected Members Back to Original Case.**

Select the member who will be the PA of the new case by checking the box for that member. Click **Assign Selected Member as PA** (Principal Applicant).

IRIS will set the selected member as the PA of the new case, as shown in the screenshot below. Choose the relationship between the two assigned PAs from the dropdown lists. Click **Set Relationships.**

New Case Number: TH-108992-A

☐	Alien ID	Seq. No.	Name	Relation to PA	SSN	Gender	Birth Date	Minor Code
☐	358568838	3	JACKSON, GREG	Principal Applicant		M	10/1/2006	M1

Relationships Between 2 Assigned Principal Applicants:

Relation of Original Case PA to New Case PA: * Mother ▼

Relation of New Case PA to Original Case PA: * Son ▼

Set Relationships

Confirm Move   Reset   Cancel

Fields marked by an asterisk (*) are required.

At any point throughout this process, you may click the **Reset** or **Cancel** buttons to correct any errors that may have been made. Clicking the **Reset** button will move all members back to the original Case on the **Case Split Screen.** Clicking **Cancel** will cancel the entire operation and return you to the dashboard.

Once you have completed the case splitting process, click on **Confirm Move** to finalize the split.

New Case Number: TH-108992-A

☐	Alien ID	Seq. No.	Name	Relation to PA	SSN	Gender	Birth Date	Minor Code
☐	358568838	3	JACKSON, GREG	Principal Applicant		M	10/1/2006	M1

Relationships Between 2 Assigned Principal Applicants:

Relation of Original Case PA to New Case PA: Mother

Relation of New Case PA to Original Case PA: Son

Confirm Move   Reset   Cancel

Fields marked by an asterisk (*) are required.

Case Transfers

Transfer Out

To transfer a case to another RA, start from the IRIS dashboard and click **Transfer a Case.**

Note: START cases have a different transfer form than WRAPS cases. These screen shots are for WRAPS case transfer form. IRIS will choose the appropriate transfer form.

Add the Case Number and click **Enter**.

Another way to initiate a transfer is to click the **Transfer Case** link on the Background Case Information screen of the case you wish to transfer.

Enter the required information into the transfer form.
- If this is a second time transfer, you must include an explanation.
- If this is a Post-Arrival transfer, IRIS will automatically add the Date of Arrival.
- Select the **Reason for Transfer** from the list provided.
- Include any comments that are pertinent to this transfer in the **Comments** field. Once the "Save & Email" button is clicked and all potential errors have been resolved, IRIS will automatically add to the Comments field, the From and To Contact Names and indicate that both agreed to the transfer.

Once you have added all the information, click **Save & Email.** The RA Transfer/Reallocation form will automatically be e-mailed to RPC at transfers@wrapsnet.org, and to the configured e-mail addresses for both sending and receiving resettlement agencies.
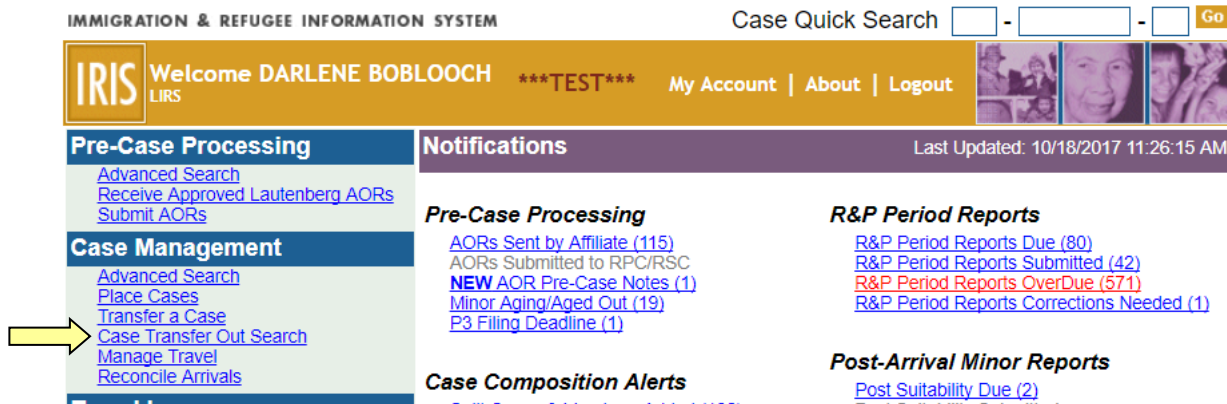
Below is an example of a transfer form which would be attached to the e-mail that is sent to RPC.

RESETTLEMENT AGENCY TRANSFER/REALLOCATION FORM

Case Number:	AF-962189		Case Size:	5	Date:	10/18/2017

PA's Name: HAIDARY, Nikbakht

From: LIRS - Lutheran Immigration And Refugee Service   Name: DARLENE BOBLOOCH
(Returning Resettlement Agency)

To: CWS - Church World Service   Name: Test Boblooch
(Gaining Resettlement Agency or RPC)

Is this a second time transfer: Yes ☐   No ☒
If yes, please explain:

Is this a post arrival transfer: Yes ☐   No ☒
If "Yes":   **Arrival date:**

Is this case booked for travel: Yes ☐   No ☒
If "Yes":   **Travel date:**   **Pro-Flight #:**   **Serial #:**

Reason for Transfer

☐ Request by U.S. Tie to work with another Resettlement Agency

☐ No longer a non U.S. Tie case (must provide updated U.S. Tie details in comments)

☐ U.S. Tie moved out of approved resettlement area

☐ Extraordinary circumstances (abuse, divorce, prison, mental instability, institutionalized)

☐ Resettlement Agency no longer has office in resettlement location

☐ Unable to locate U.S. Tie

☐ SIV Placement Option Selected

☒ Other -- See Comments

Comments (Please include updated U.S. Tie contact information here):
DARLENE BOBLOOCH (LIRS) and Test Boblooch (CWS) agreed to the transfer.

Testing

Xref's also transferred:

Please return form to: Transfers@wrapsnet.org

Finding a Case that has Been Transferred

To locate a case which has been transferred, click on the **Case Transfer Out Search** link from the dashboard.

You may enter search criteria into any of the fields on the Case Transfer Out Search screen. In the example below, the user is searching for a case transferred to CWS.

When finished entering your search criteria, click **Submit**.

Your Search Results will appear. Clicking on the link associated with the case you are looking for will take you to the Resettlement Agency Transfer/Reallocation Form for that case. From there, you may view information about the transfer, print the Transfer Form, or even resubmit it if necessary.

When a case is successfully transferred, IRIS will change the Active Status of a case to Closed and add a line to the header of the case to make the transfer obvious.

Transfer In

Sometimes when an RA transfers a case out, the receiving RA is unable to take it and returns it. Also, some RAs may want to capture information about standard Transfer Ins for statistical purposes. To capture Transfer In information, do the following:

1. Navigate to the Background Case Information screen, click the Case Active Status field dropdown, select **Active** and click **Save**.

2. Once the case has been reopened, the **Edit** link becomes available.

In edit mode, you can select **Yes** for "Transferred in?", which will cause the Transfer In fields to open up. Enter all desired data and click **Submit** to save.

Notice that the header now also contains information about the Transfer In.

The rules that are built into IRIS regarding when the transfer information in the header is in red or black font are as follows.
- The most recent transfer will be in red font.
- If both the Transfer In and Transfer Out are the same day:
    - If the case is Active, the Transfer In information will be in red font and the Transfer Out information will be in black font.
    - If the case is Closed, the Transfer Out information will be in red font and the Transfer In information will be in black font.
- If one or both transfers are missing a date, both the Transfer In and Transfer Out information will be in red font.

Travel

Under the Case Management section of the Dashboard, click on the **Manage Travel** link. IRIS will automatically display all future, scheduled travel for your agency's cases. You can enter a date range if you wish to see a subset of all travel that is scheduled. You can also export the list by selecting the type of export you wish and clicking the Export button. Click the "Show all scheduled travel" button to return the list to showing all future travel that is scheduled for your agency.

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

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Manage Travel

Start POE Arrival Date: [   ]

End POE Arrival Date: [   ]

[View] [Select Output ▼] [Export] [Show all scheduled travel]

Displaying 1 - 1 of 1 Result(s) (OR) Display [20 ▼] results per page.

* Red text indicates a case where domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates a case whose Final Arrival Date/Time is a day or more later than the POE Date/Time.

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POE Arrival Date/Time	Final Arrival Date/Time	Affiliate	Case Number	Serials	Case Size	PA Name	ProFlight#	Has Domestic
2/28/2019 11:00 AM	3/1/2019 7:00 AM	AZ-Phoenix	TH-105860	1,2	2	ROSS, MARSHALL	AAA1111	Yes

Following the list of scheduled travel are buttons to allow you to search travel, add ProFlights, and access the IOM interface.

[Print Report] [Search Travel] [Add Proflight] [IOM Interface] [Cancel]

Clicking on a Case Number link will take you to the Travel screen for that case.

Travel Information

Final Destination: Sky Harbor Int'l   **Arrival Date:** 4/29/2018
Port of Entry: LAX: Los Angeles Int'l

Members

Ser#	Name	DOB	Gender	PA/Rel?	Dep?	None-Departure Reason
5	MITCHELL, DOLORES	12/31/1937	F	PA		
	Travel Req: Wheelchair - Ground Med Escort:					

[Print]

Flights

Proflight No.	Flight No.	PNR No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
THI0133	ON017		1 ABN	4/29/2018	INU: Nauru	2:30 PM	4/29/2018	NAN: Nadi Int'l	5:40 PM
THI0133	FJ810		2 ABN	4/29/2018	NAN: Nadi Int'l	9:00 PM	4/29/2018	LAX: Los Angeles Int'l	12:45 PM
THI0133	AA1694	FYMUJL	1 DOM	4/30/2018	LAX: Los Angeles Int'l	11:25 AM	4/30/2018	PHX: Sky Harbor Int'l	1:00 PM

* Red text indicates that domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates that this case has a Final Arrival Date/Time that is a day or more later than the POE Date/Time.

Pets

Pet	Special Handling Instructions

[Add Pet]

Travel History

Date / Time	Status	Remarks	Changed By
3/23/2018 1:05 PM	Travel Added (eABN)	Domestic Leg: AA1694	MARSHA HALL
3/22/2018 4:50 PM	Travel Added (eABN)	ProFlight: THI0133	MARSHA HALL

Search Travel

From the Manage Travel screen, you can search for travel by clicking on the **Search Travel** button. You will be presented with the following Travel Search screen, where you may search based on a variety of criteria. When finished, scroll to the bottom and click the **Search** button.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search [____] - [_____] - [__] Go

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Travel Search

○ Specific Proflight #: [_____]
○ Specific Case #: [____] - [_____] - [____]
● Extended Search:

POE Arrival Date	from: [_____]	
	to: [_____]	
Final Arrival Date	from: [1/1/2018]	
	to: [5/30/2018]	
Affiliate:	Select One ▼	
Arriving Airport (any leg):	Select One ▼	
Case Processing Status:	[_____] ▼	
Date Added/Updated	from: [_____]	
	to: [_____]	
Has Domestic? ☐		

[Search] [Cancel]

Fields marked by an asterisk (*) are required.

You will be presented with a list of cases that meet the criteria you entered.

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

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Travel Search Results

Displaying 1 - 20 of 540 Result(s) (OR) Display [20 ▼] results per page.

* Red text indicates a case where domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates a case whose Final Arrival Date/Time is a day or more later than the POE Date/Time.

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POE Arrival Date/Time	Final Arrival Date/Time	Affiliate	Case Number	Serials	Case Size	PA Name	ProFlight#	Has Domestic
1/3/2018 6:15 PM	1/3/2018 6:15 PM	New York	AF-956146	12,13,14,15,16	5	FLEMING, ANITA	JOI3013	
1/2/2018 7:10 PM	1/3/2018 6:57 PM	Sacramento	AF-967717	16,17,18,19,20	5	DAVIS, MARIO	JOI3032	Yes
1/2/2018 7:10 PM	1/3/2018 6:57 PM	Sacramento	AF-967726	21,22,23,24,25	5	LAMBERT, FRED	JOI3032	Yes
1/3/2018 7:10 PM	1/3/2018 7:10 PM	Baltimore	IS-100219	6	1	HOLMES, JOSHUA	ATI0500	
1/4/2018 7:50 AM	1/4/2018 7:50 AM	Baltimore	ET-134208	1	1	GARDNER, DELORES	ETI0003	
1/4/2018 8:10 AM	1/4/2018 8:10 AM	Silver Spring	MY-219821	1,2,3,4,5	5	CASTRO, DAVE	MYI0019	
1/3/2018 7:10 PM	1/4/2018 3:35 PM	Phoenix	IS-100317	7,8,9,10,11,12	6	WALTERS, TONYA	ATI0500	Yes
1/4/2018 7:10 PM	1/4/2018 7:10 PM	Silver Spring	AF-967351	10	1	JONES, EDWIN	JOI3015	
1/3/2018 7:10 PM	1/4/2018 8:21 PM	Tucson	IS-100246	13	1	MORRISON, EDWARD	ATI0500	Yes
1/3/2018 7:10 PM	1/4/2018 8:21 PM	Tucson	IS-950041	15	1	MAY, RUSSELL	ATI0500	Yes
1/3/2018 7:10 PM	1/4/2018 8:21 PM	Tucson	IS-100254	14	1	MORALES, KIRK	ATI0500	Yes
1/4/2018 7:40 AM	1/4/2018 8:44 PM	Dallas	MY-220456	6,7	2	GARCIA, YOLANDA	MYI0001	Yes
1/4/2018 7:40 AM	1/4/2018 8:44 PM	Dallas	MY-208583	2,3,4,5	4	CUNNINGHAM, TIMOTHY	MYI0001	Yes
1/4/2018 6:15 PM	1/5/2018 3:00 PM	Sacramento	AF-967659	16,17,18	3	SCOTT, STEVE	JOI3014	Yes
1/4/2018 7:10 PM	1/5/2018 3:34 PM	Oakland	AF-967152	31,32,33	3	WALKER, PERRY	JOI3015	Yes
1/9/2018 7:10 PM	1/9/2018 7:10 PM	Silver Spring	IS-950010	6	1	GARCIA, ALFRED	ATI0501	
1/9/2018 2:45 PM	1/9/2018 11:58 PM	Seattle	AF-963700	5,6,7,8,9	5	CUNNINGHAM, CALVIN	JOI3000	Yes
1/9/2018 2:45 PM	1/9/2018 11:58 PM	Seattle	AF-967715	31	1	PENA, CLAUDIA	JOI3000	Yes
1/10/2018 11:07 AM	1/10/2018 11:07 AM	Los Angeles	ES-202622	1	1	HARVEY, PENNY	SVI0001	
1/10/2018 11:07 AM	1/10/2018 11:07 AM	Los Angeles	ES-202624	3	1	HALL, MARCIA	SVI0001	

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[Redefine Search] [Cancel]

Add ProFlight (Advanced Booking Notification)

While the entry of most ProFlight data is typically done via the IOM eABN/eDOM interface, it is possible to manually enter cases in IRIS if it becomes necessary.

From the Manage Travel screen, click on the **Add Proflight** button. Enter the ProFlight Number and click **Save and Continue**


The Advanced Notice section of the screen will become active, allowing you to change the ProFlight's status and add flight and case information. The travel data should be entered in the following order:
1. International Flight Legs
2. Cases
3. Final Booking
4. Ground Transportation

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

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Travel Notices

Internal PFID: ZZZZ1234
Proflight Number: ZZZZ1234, Change
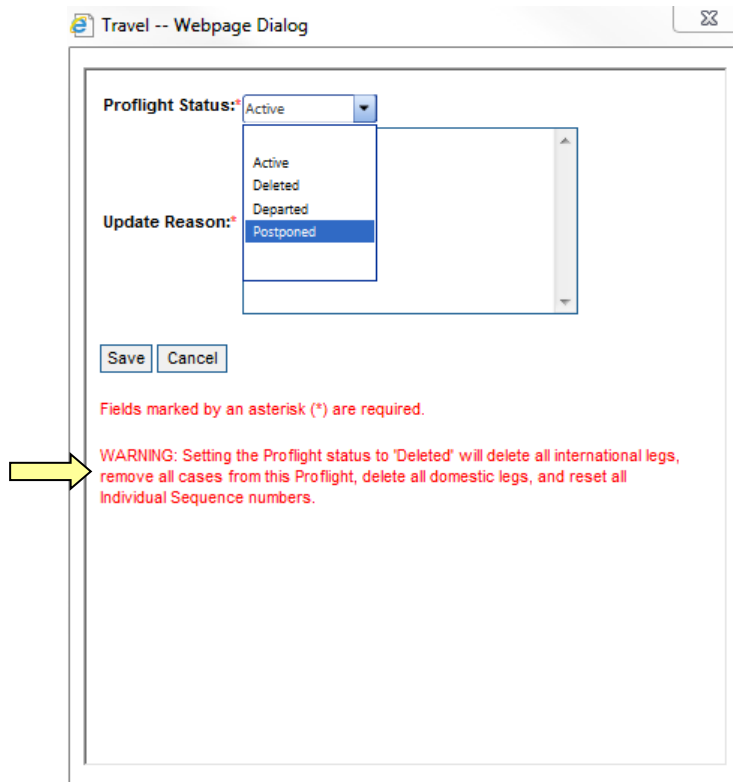
Proflight Status: Active [Change Status]

Advanced Notice

Flight No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time

[Add International Flight Legs]

[Add Cases] [Add Final Booking] [Add Ground Transportation]

[Add New Proflight] [Cancel]

If you click the **Change Status** button, you will be presented with the following screen. As indicated in the screenshot, setting the ProFlight Status to "Deleted" will delete all international legs, remove all cases from the ProFlight, delete all domestic legs, and reset all individual Sequence numbers.

When you click the **Add International Flight Legs** button, the following screen will pop up. Enter the information for the first leg and click **Save**. Repeat process until all international flight legs have been entered. Note that IRIS will check the Port of Entry checkbox automatically upon entering the final arrival airport.

Note that **PNR Number** is used to identify domestic flights and should not be entered when adding international flight legs.

The flight is now listed on the Travel Notices screen, as shown on the next page. Should you need to edit the information, click on the link associated with the flight number. The dialog box will re-open and you may make any necessary changes. Note that Leg # is blank due to the manual entry of this travel data. When travel data is imported via the eABN/eDOM process, Leg # will not be blank.

Once the international flight information has been added, you can now add the cases that are associated with this ProFlight by clicking the **Add Cases** button. When the dialog box opens, enter the **Case Number** for the first case on this flight. Then click **Get Member List**.

Enter the **IOM Serial Number** for each member of the case on the flight. IRIS is programmed to assume that all members are on the flight. If any member is not on this flight, uncheck the checkbox next to that member and leave the **IOM Serial Number** box blank, as shown below for Marion Watkins. Click **Save**.

When IRIS returns you to the Travel Notices Screen, you have the ability to enter any additional cases on this ProFlight. Click on **Add Cases** again and repeat the above steps until all cases have been entered.

Once you enter a case, IRIS will list its members on the Travel Notices page. There are two cases on the ProFlight in the below example. All members of each case are listed on the screen. You may edit or remove a member's information by clicking on one of the links on the right.

IRIS adds the IOM and Assurance Final Destination information in the Final Booking section within each case's information. See the section in this manual called "Final Booking (Domestic Booking)" for information on how to complete the Final Booking.

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

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Travel Notices

Internal PFID: ZZZZ1234
Proflight Number: ZZZZ1234, Change

Proflight Status: Active [Change Status]

Advanced Notice

Flight No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
123456789		6/11/2018	AUH: Abu Dahbi Int'l	6:00 AM	6/11/2018	JFK: John F Kennedy Int'l	2:00 PM

[Add International Flight Legs]

Case: AF-946489

Members

Ser#	Name	DOB	Gender	PA/Rel	Dep?	Non-Departure Reason	Actions
1	MAY, ALLEN	12/3/1985	M	PA			edit | remove
	Travel Req: Med Escort:						
2	COOK, CASSANDRA	3/28/1991	F	WI			edit | remove
	Travel Req: Med Escort:						
3	HOLLAND, ROSEMARY	9/30/2011	F	DA			edit | remove
	Travel Req: Med Escort:						

* Red text indicates a case where domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates a case whose Final Arrival Date/Time is a day or more later than the POE Date/Time.

Final Booking

Flight No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
			IOM Final Destination: Assurance Final Destination:			OAK: Metropolitan Oakland Int'l OAK: Metropolitan Oakland Int'l	

Ground Transportation

Transportation Type	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
			IOM Final Destination: Assurance Final Destination:		OAK: Metropolitan Oakland Int'l OAK: Metropolitan Oakland Int'l	

Remarks

[   ]

Case: AF-946584

Members

Ser#	Name	DOB	Gender	PA/Rel	Dep?	Non-Departure Reason	Actions
4	HOWELL, BERNARD	2/19/1988	M	PA			edit | remove
	Travel Req: Med Escort:						

* Red text indicates a case where domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates a case whose Final Arrival Date/Time is a day or more later than the POE Date/Time.

Final Booking

Flight No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
			IOM Final Destination: Assurance Final Destination:			DFW: Dallas/Fort Worth Int'l DFW: Dallas/Fort Worth Int'l	

Ground Transportation

Transportation Type	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
			IOM Final Destination: Assurance Final Destination:			DFW: Dallas/Fort Worth Int'l DFW: Dallas/Fort Worth Int'l	

Remarks

[ ]

[Add Cases] [Add Final Booking] [Add Ground Transportation]

[Add New Proflight] [Cancel]

If you have another proflight to enter, you may do so from this screen by clicking **Add New Proflight** at the bottom of the screen.

Once you have completed entering the information from the ABN, IRIS can generate a **NEW Travel Info** dashboard notification for the resettlement agency and affiliate office, depending upon how the version of IRIS is configured. Likewise, IRIS can also be configured to send an e-mail to both.

Travel Requirements and Medical Escort

If anyone on the flight has travel requirements or needs a medical escort, these should be noted in the **Travel Req** and **Med Escort** sections within the member grid on the Travel Notices screen. Open this grid by clicking **edit** in the "Actions" column next to any of the members.

Viewing Travel Information from the Case Screen

When you enter travel data, IRIS also updates the Case Screen for each case on the flight. Both the RA and the affiliate may view travel information from this screen. The **Processing Status** on the Case Header changes to **Scheduled to Travel** if the arrival date is in the future or to **Arrived** if the arrival date is the current date or earlier. To view the flight information, click on the **Travel** Tab. The screenshot on the next page shows travel information and a list of all members of the case on the flight. There is also a record of all activity related to travel at the bottom of the screen. It is called Travel History.

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

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Case ID:	AF-946489	Case Size:	4	Allocation Date:	7/17/2013
Case Type:	Refugee	Processing Status:	Arrived	Assurance Date:	7/24/2013
Case Pool:	Geo	Active Status:	Active	Arrival Date:	6/11/2018
Affiliate:	OAK - Oakland			90th Day:	9/8/2018
PA Name:	MAY, ALLEN			MG Enroll Date:	
				Enrolled Programs:	R&P

Pre Arrival	Post Arrival	RA Notes	Matching Grant	Other Programs
RPC BioData	Placement	Assurance	Pre-Case Documents	Travel

Travel Information

Final Destination:	Metropolitan Oakland Int'l	Arrival Date:	6/11/2018
Port of Entry:	JFK: John F Kennedy Int'l		

Members

Ser#	Name	DOB	Gender	PA/Rel?	Dep?	None-Departure Reason
1	MAY, ALLEN	12/3/1985	M	PA		
	Travel Req: Med Escort:					
2	COOK, CASSANDRA	3/28/1991	F	WI		
	Travel Req: Med Escort:					
3	HOLLAND, ROSEMARY	9/30/2011	F	DA		
	Travel Req: Med Escort:					

[Print]

Flights

Proflight No.	Flight No.	PNR No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
ZZZZ1234	123456789			6/11/2018	AUH: Abu Dahbi Int'l	6:00 AM	6/11/2018	JFK: John F Kennedy Int'l	2:00 PM

* Red text indicates that domestic flight data is prior to international flight data. This is usually temporary and resolves itself once IOM reschedules and transmits domestic travel.

* Orange highlighted text indicates that this case has a Final Arrival Date/Time that is a day or more later than the POE Date/Time.

Pets

Pet	Special Handling Instructions

[Add Pet]

Travel History

Date / Time	Status	Remarks	Changed By
6/11/2018 11:38 AM	Travel Changed	International Leg: 123456789 / Flight changed	DARLENE BOBLOOCH
6/11/2018 11:23 AM	Travel Changed	International Leg: 33333333 / Flight changed	DARLENE BOBLOOCH
6/11/2018 11:21 AM	Travel Changed	International Leg: 123456789 / Flight changed	DARLENE BOBLOOCH
6/11/2018 9:06 AM	Travel Changed	International Leg: 123456789 / Flight changed	DARLENE BOBLOOCH
6/11/2018 8:51 AM	Travel Added	ProFlight: ZZZZ1234	DARLENE BOBLOOCH

Adding a Pet

If there are any pets traveling with the case, you may enter them from this screen by clicking the **Add Pet** button.

A dialog box will open. Choose the type of pet from the dropdown and enter any special handling instructions. When finished, click **Save**.

IRIS adds the Pet information to the travel page.

Final Booking (Domestic Booking)

To enter the Domestic Booking information, start from the IRIS dashboard. Select **Manage Travel** and click **Search Travel** at the bottom of the screen.

Enter the ProFlight Number and click **Search**.

The Travel Notices screen will open. Scroll to the bottom and click **Add Final Booking**.

From here, there are two ways to continue, depending on whether the cases for your agency on this ProFlight are also on the same domestic flight.

1. To add the final booking for the entire ProFlight, enter the **Flight Number** and **PNR Number** at the top left of the dialog box.

   Since, in this case, you are adding the same final booking for all cases in the ProFlight, it is not necessary to enter PNR Numbers in the Cases grid. You only need to click the **Add?** checkbox next to each of the cases.

   Finally, add the **Departure** and **Arrival** information and click **Save**.

When you complete this step, IRIS adds the information to both the Travel Notices screen and the Travel tab within the case screen.

2. To enter the final bookings for the ProFlight case-by-case, enter the **Flight Number** at the top left of the dialog box. In the Cases grid, add **PNR Number** and click the **Add?** checkbox. Then add the **Departure** and **Arrival** information and click **Save**.

   You will need to repeat these steps for each case in the proflight.

As with the individual method of entering the domestic information, when you complete this step, IRIS adds the information to both the Travel Notices screen and the Travel tab within the case screen.

Ground Transportation

To add ground transportation, click the **Add Ground Transportation** button at the bottom of the Travel Notices screen.

Indicate which cases you would like the Ground Transportation to be added to by clicking the **Add?** checkbox next to the desired PAs' names. Then, add the **Departure** and **Arrival** information and click **Save**.

IRIS will add the Ground transportation information to both the Travel Notices Page and the Travel tab within the case screen.

Updating or Deleting Travel Information

Changing or Deleting an Entire ProFlight

If there is a change to travel information, you should notify your affiliate office in both a VOLAG note and an e-mail. The Proflight Status button should only be used if the change or deletion has been made to the *entire* ProFlight. If this is the case, click on the **Change Status** button.

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Travel Notices

Internal PFID: THI0145
Proflight Number: THI0145, Change

Proflight Status: Active   [Change Status] ⬅

Advanced Notice

Flight No.	Leg #	Departure Date	Departure Airport	Departure Time	Arrival Date	Arrival Airport	Arrival Time
CI832	1 ABN	6/29/2018	BKK: Bangkok Int'l	1:20 PM	6/29/2018	TPE: Chiang Kai Shek	6:00 PM
CI008	2 ABN	6/29/2018	TPE: Chiang Kai Shek	11:50 PM	6/29/2018	LAX: Los Angeles Int'l	8:50 PM

[Add International Flight Legs]

Case: TH-156655

Members

Ser#	Name	DOB	Gender	PA/Rel	Dep?	Non-Departure Reason	Actions
1	LONG, SUSAN	9/1/1945	F	PA			edit | remove

A dialog box will open. Choose the appropriate status from the dropdown and enter the reason for the change. When finished, click **Save**.

Travel information for all cases on the flight will be updated or deleted.

Changing or Deleting a Specific Leg of a ProFlight

From the **Travel Notices** screen, click the **Flight No.** link.

If modifying the flight, make the necessary changes, add an **Update/Delete Reason** and click **Save**. If deleting the flight, add an **Update/Delete Reason** and click **Delete**. A pop-up message will display to verify that you are sure you want to delete the flight leg.

IOM Interface

The IOM Interface screen is accessible from the Manage Travel screen. From this screen, you can manually call for data from IOM's travel web service. These functions are helpful if you believe the automated eABN/eDOM interface has somehow missed data.

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IOM Interface Functions

The "Get Latest IOM ABN Data" process last ran at 12/1/2017 11:43 PM
The process is scheduled to run next at 12/2/2017 12:16 AM
Use the options below to manually get ABN data from IOM:

◉ Manually check for Latest IOM ABN Data
○ Get specific ProflightID: [_____]
○ Get All ABN's sent since: [_____] 🗓 ⏰
○ Get ABN's w/DOA between: [_____] 🗓 ⏰
                      And: [_____] 🗓 ⏰

[Run Now] [Cancel] [Search Travel]

IOM Interface Function	Description
Manually check for Latest IOM ABN Data	This is the same process used by the automated interface, but can be run manually here. Only new data not already sent to IRIS will be received.
Get Specific ProflightID	To get travel data on one specific ProFlight.
Get All ABN's sent since	Allows you to request travel data using the date and time that the travel data was originally sent
Get ABN's with DOA between	Allows you to request all travel with arrival dates between the date range that you enter.

Whenever you manually request IOM data – by selecting the type and clicking the **Run Now** button – IRIS will let you know the results.

The example below shows the results of asking for the latest IOM ABN data when there is no new data. This may occur if the automated process just finished before you requested it:

eABN Service Invoke

Use the options below to manually get ABN data from IOM:

⦿ Manually check for Latest IOM ABN Data

◯ Get specific ProflightID: [   ]

◯ Get All ABN's sent since: [   ] 📅 ⏰

◯ Get ABN's w/DOA between: [   ] 📅 ⏰

And: [   ] 📅 ⏰

[Run Now] [Cancel]

eABN Service Invoke Result

OK, Parser

Success:
Success, but there was nothing to import (xml is empty)

The next example shows where there is data returned. IRIS gives the details of each transaction:

eABN Service Invoke Result

OK, Parser

Success:
ParseABN_New. ProFlight JOB3013.
Individual LAFI, Hezam Atiyah (212295980) was included into ProFlight JOB3013
Individual KHASHEN, Ajeba Yasir (212295979) was included into ProFlight JOB3013
ParseABN_Departed. ProFlight JOB3013.
Individual LAFI, Hezam Atiyah (212295980) was departed. ProFlight - JOB3013
Individual KHASHEN, Ajeba Yasir (212295979) was departed. ProFlight - JOB3013

Interface Administration

The settings for the interface can be managed in the Admin Configuration module, which is accessible from the dashboard, but only for IRIS users with administrative permissions.

Once in the Admin Configuration module, click the + sign associated with the Travel section to open it up.

Hover over the "i" in the blue circle to learn more about each setting.

View eABN Imports Notification

The View eABN Imports Notification is accessible from the dashboard in the Travel section. A separate row is created each time the interface is run manually or as part of the automatic process. If the Warnings column contains a Yes, click the **View Details** link to view the warning. If the Data column contains a Yes, that indicates data was imported during the run. Click the **View Details** link to see what data was imported.

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There are 48 eABN Travel(s) Imported

Create Date	Note	Method	Warnings	Data	Details	Dismiss
6/11/2018 2:52:54 PM	Parser OK	UpdateABNByPFID UGI5054	Yes	Yes	View Details	☐
6/11/2018 2:52:35 PM	Parser OK	UpdateABNExportLatest	Yes	Yes	View Details	☐
6/11/2018 2:19:33 PM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 1:46:32 PM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 1:13:31 PM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 12:39:48 PM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 12:06:47 PM	Parser OK	UpdateABNByPFID KEI7085			View Details	☐
6/11/2018 12:06:46 PM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 11:33:45 AM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 11:00:35 AM	Parser OK	UpdateABNExportLatest		Yes	View Details	☐
6/11/2018 10:27:33 AM	Parser OK	UpdateABNByPFID UGI5054	Yes	Yes	View Details	☐
6/11/2018 10:27:31 AM	Parser OK	UpdateABNByPFID JOI7044			View Details	☐
6/11/2018 10:26:59 AM	Parser OK	UpdateABNExportLatest	Yes	Yes	View Details	☐
6/11/2018 9:53:58 AM	Parser OK	UpdateABNByPFID JOI3296			View Details	☐
6/11/2018 9:53:36 AM	Parser OK	UpdateABNExportLatest			View Details	☐
6/11/2018 9:20:35 AM	Parser OK	UpdateABNByPFID THI0197			View Details	☐
6/11/2018 9:20:05 AM	Parser OK	UpdateABNExportLatest	Yes		View Details	☐

Reconcile Arrivals

Overview

The purpose of the reconciliation process is to compare the cases in IRIS that arrived during a specified period of time (month or year) to the cases that RPC sends from their database as having arrived during the same time period for that Resettlement Agency (RA).

During each fiscal year, RAs perform monthly reconciliations. After the fiscal year ends, an annual reconciliation is performed. For each reconciliation, there are one or more "initial" reconciliations, where comparisons and corrections are made, and then a "final" one, where the arrival data in both the resettlement agency database and the RPC database agree.

The RPC compiles and sends reconciliation data files in the second month after arrival. For example, November arrival data is sent starting in January. Because this is a reiterative process, an RA could have multiple reconciliation processes going on at the same time.

The RA runs the WRAPS Import, which loads the RPC reconciliation data into an IRIS Reconciliation table. IRIS then compares the imported data to what is in the RA's database. To view results of the import, the RA will navigate to the Reconcile Arrivals link on the dashboard under the Case Management section and scroll down to the Reporting Month (or year) that matches the dates in the reconciliation data that was just imported. IRIS will load the Reconciliation Report, which the RA will review to see what discrepancies exist between what RPC thinks the RA has versus what is actually in the RA's IRIS database.

Importing WRAPS Reconciliation Files

Click the **Load WRAPS Files** link from the dashboard to import the Reconciliation data received from RPC.
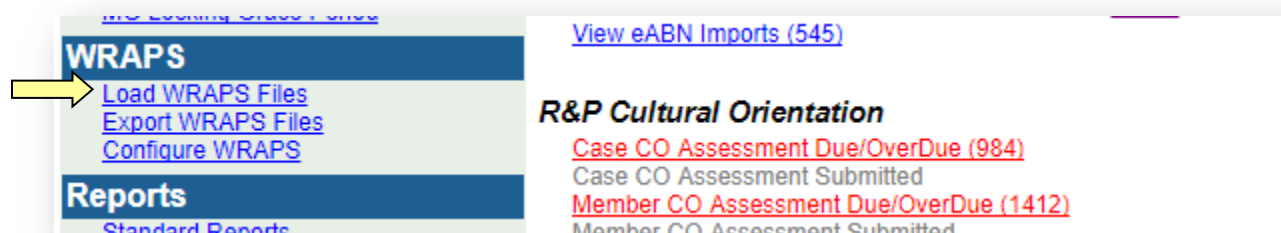
Select the **RECONCILIATION** File Type or **FINALRECON** File Type. RECONCILATION is selected for the initial and subsequent imports until the discrepancies between the RA's data and RPC's data have been resolved. FINALRECON should only be selected once the RA believes the RPC and IRIS databases are in synch.

Next, select whether you are running the Monthly or Annual reconciliation, browse for the file that you wish to import and click Start to being the import.

Reconciling Arrivals

Once the import has completed, return to the dashboard and click the Reconcile Arrivals link.

Click the link to the **Reporting Month** for which you just ran the import.

The report contains six possible areas where the RPC data and IRIS data may not match, as shown and described below.

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Reconciliation Report

Load Date: 11/1/2018   **Type:** Final
Report Month: From 9/1/2018 through 9/30/2018 **Status:** In Progress

Reports	Number of Cases
Unmatched Resettlement Agency Cases	1
Unmatched RPC Cases	0
Unmatched Case Size	0
Unmatched Arrival Date	0
Unmatched Proflight Number	0
Unmatched Affiliate Code	0

1. Resettlement Agency Unmatched Cases

Case #	PA Name	Case Size	Arrival Date	Proflight #	Affiliate Code
AF-963016	HENDERSON, RYAN	3	9/26/2018		VALIRS02

Total: 1 Case
3 Individuals

Go Back To Top

2. RPC Unmatched Cases

Case #	PA Name	Case Size	Arrival Date	Proflight #	Affiliate Code

Total: 0 Case
0 Individual

Go Back To Top

3. Unmatched Case Size

Case #	RA Case Size	RPC Case Size	Arrival Date	Affiliate Code

Total: 0 Case

Go Back To Top

4. Unmatched Arrival Date

Case #	RA Arrival Date	RPC Arrival Date	Affiliate Code

Total: 0 Case

Go Back To Top

5. Unmatched Proflight Number

Case #	RA Proflight Number	RPC Proflight Number	Affiliate Code

Total: 0 Case

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6. Unmatched Affiliate

Case #	RA Equivalent WRAPS Code	RPC WRAPS Code

Total: 0 Case

IRIS total arrivals for reporting period	Total Arrived Cases	Total Arrived Individuals
	170	402
RPC total arrivals for reporting period	Total Arrived Cases	Total Arrived Individuals
	169	399

Go Back To Top

☐ I confirm that this report has been verified and is ready for sending to RPC.

View Affiliate Approvals

[Save] [Print Report] [Return to Previous Page]

Fields marked by an asterisk (*) are required.

1. RA Unmatched Cases

   Displays cases that were not in the file that was imported from RPC, but are in IRIS as having arrived during the reporting period.

2. RPC Unmatched Cases

   Displays cases that were in the file that was imported from RPC, but either are not in IRIS, are in IRIS with a status of Closed, or do not contain an arrival date that falls in the reporting period.

3. Unmatched Case Size

   Displays cases where the case size differs between what is in WRAPS and what is in IRIS.

4. Unmatched Arrival Date

   Displays cases where the arrival date differs between what is in WRAPS and what is in IRIS.

5. Unmatched Proflight Number

   Displays cases where the proflight number differs between what is in WRAPS and what is in IRIS.

6. Unmatched Affiliate

   Displays cases where the affiliate with whom the case is placed differs between what is in WRAPS and what is in IRIS.

Investigate and communicate with RPC regarding the discrepancies that were found. Reimport new reconciliation files as needed from RPC. Once all discrepancies have been resolved, the Final file can be requested from RPC and imported.

Older monthly reconciliation files can be viewed by clicking the **Completed Reconciliations** button.

Affiliate Involvement

Affiliates have access to the Reconciliation links. On the main Reconciliation page, the affiliate will see totals that reflect all of the RA's arrivals. However, when the affiliate navigates to the Reconciliation Report, only the cases that are placed with that affiliate will be displayed.

Administration

The Administration section on the navigation bar contains links for the following functions:

- <u>User Maintenance</u> – manage users and permissions
- <u>Affiliate Maintenance</u> – manage affiliate agency data and capacities
- <u>E-mail Announcements</u> – send e-mail announcements to all users or to certain user groups
- <u>Form Template Maintenance</u> – add or edit forms available in IRIS
- <u>All Forms</u> – access forms available in IRIS
- <u>Per Capita Maintenance</u> – set amount of R&P funds for refugees for each fiscal year
- <u>MG Program Maintenance</u> – set up Program Cycles, Program Years and MG Slots

User Maintenance

IRIS users are "invited" to join IRIS. An IRIS admin can set up the new user by specifying an e-mail address and the permissions to be assigned to a user. This triggers IRIS to send an e-mail message to the new user – the message contains a link to an IRIS user set up screen, where they can enter their name, contact information, username and password.

Inviting a New User

To invite a new user, click on the **User Maintenance** link. The **User Search** screen will open. Click the **Invite User** button.

Type the information you have for this user into the fields on the User Maintenance screen, as shown on the next page. Users create their own usernames, so the Username field should be left blank.

The checkbox **Allow Access to Sub-offices** allows staff from affiliates with sub-offices to view data related to all of their offices when logged in as the main office. Affiliate Supervisors who have this permission may assign it to other staff.

The groups you assign for users will determine their permission levels, along with which functions appear on the dashboard and which notifications they receive. To assign a group, find it in the **Unassigned Groups** list, select it, and then click on the arrows to move it to the **Assigned Groups** field.

User Groups

You may assign a new user to one or more of the following groups:

- IRISUserAdmin – IRIS User Administrator.
- VOLAGCaseMgmtStaff – This is the basic permission in the RA version of IRIS. All users should be given this permission unless they only need to be able to run reports, in which case they should be given VOLAGReportsOnly.
- VOLAGLoanMgmt – VOLAG Loan Manager.
- VOLAGReportStaff – This group receives notifications related to the R&P 90 and 180 day reports.
- VOLAGMGStaff – RA MG Staff members receive notifications related to Matching Grant issues, and the dashboard includes a section on MG reports.
- LWSStaff – Loan Web-Service staff.
- VOLAGReportsOnly – VOLAG login with access only to reports.
- ReadOnlyOverride – This override can be used in conjunction with VOLAGCaseMgmtStaff to allow a user read-only access to IRIS.

- VOLAGPreArrivalNotifications – This group receives notifications pertaining to Pre-Arrival functionality.

Assign the Permission Groups for this user by selecting one (or more, by dragging) on the right side under "Unassigned Groups" and clicking on the double-left-arrow button (<<). This will move the group(s) over to the "Assigned Groups" box.

For most VOLAG users you will give the basic group "VOLAGCaseMgmtStaff" group, and then add others as needed by the person, based on his/her role.

If you want to prevent notification e-mails from being sent to this user, check the "Do not send any e-mails to this account" checkbox near the bottom of the screen. Once you have finished entering all the information, click **Save**.

IRIS confirms that the user was successfully invited. Please see the IRIS Basics section at the beginning of this manual for instructions on how the user will proceed when they receive their invitation.

Editing User Information/ Unlocking an Account

If you need to change any of the profiles for a user, click on the **User Maintenance** link on the dashboard. You may search by Username, First Name, Last Name, e-mail, VOLAG/Affiliate, or Status. The system defaults to searching for active users, but you may also search for inactive ones by clicking the dropdown in the Status field. Enter the information you have and then click **Search**.

Your Search Results screen will open. Select the link associated with the username you wish to view.

The User Maintenance screen for this staff member will open. You may edit the fields as necessary. If a user has made three unsuccessful attempts to log in, IRIS will lock his account, and the checkbox indicating that the account is locked will be checked. To unlock the account, uncheck the checkbox and then click **Save.**

Affiliate Maintenance

IRIS enables the user to view and manage affiliate information by clicking the **Affiliate Maintenance** link from the dashboard. The **Affiliate Maintenance** screen is pictured below.

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Affiliate Maintenance

Displaying 1 - 20 of 67 Result(s) (OR) Display [20 ▼] results per page.

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Short Name	WRAPS Affiliate Code	VOLAG Affiliate Code	Abbreviation	Office Type	Is URM
AZ-Phoenix	AZLIRS01	24	LSMS-AZ	Main	
AZ-Tucson	AZLIRS02	24A	LSMS-AZ	Sub	
CA-Los Angeles	CALIRS01	04	IRIS-CA	Main	
CA-Sacramento	CALIRS03	03B	ODI-CA	Main	
CA-Fullerton URM	CALIRS06	04X	CSCF	Main	Yes
CO-Denver	COLIRS01	05	LFS-RM	Main	
CO-Colorado Springs	COLIRS02	05A	LFS-RM	Sub	
CO-Denver URM	COLIRS03	05Y	LFS-RM	Sub	Yes
CO-Colorado Springs URM	COLIRS04	05Z	LFSRM-URM	Sub	Yes
CO-Greeley	COLIRS05	05B	LFS-RM	Sub	
MA/CT-Hartford	CTLIRS01	23E	LCS-SNE	Sub	
DC URM	DCLIRS01	19X	LSS/NCA	Main	Yes
FL-Tampa	FLLIRS01	17	LFS-FL	Main	
FL-Jacksonville	FLLIRS02	28	LSS-JAX	Main	
FL-Orlando	FLLIRS03	17E	LFS-FL	Sub	
FL-Miami	FLLIRS05	17D	LFS-FL	Sub	
GA-Atlanta	GALIRS01	16	LMG-GA	Main	
GA - Savannah	GALIRS02	16A	LSG	Sub	
IA-Des Moines	IALIRS01	08	LSI-IA	Main	
IA-Waterloo	IALIRS04	08D	LSI-IA	Sub	

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[First Page][Previous Page][Next Page][Last Page]

[Add Affiliate] [Cancel]

To begin working with an affiliate, click the link for that office. A screen containing the following three tabs will appear:
- Agency Basics
- Affiliate Profile
- Program Capacity

Agency Basics

In the Agency Basics tab, you may maintain demographic data related to the affiliate.

Affiliate Profile

Click on the **Affiliate Profile** tab to view and edit the affiliate's information, such as case types accepted, programs available, nationality/ethnicity, and languages. There are also links to a report that lists ethnicities resettled in the last three program years, as well as the affiliate profile report. You can also enter additional information in the Notes box. Checkboxes allow you to indicate if supervisor approval is required, request a data update/additional information needed and accept affiliate changes.

Projected Caseload (Nationality / Ethnicity) for Current FY:

Nationality/ Ethnicity

- ⊟ Burma
  - Karen
  - Chin
  - Karen NI (kayar)
  - Rohingya
- Afghanistan
- Bhutan
- Burundi
- Congo
- Cuba
- Dem. Rep. Congo
- Eritrea
- Ethiopia
- Iraq - Saudi Arabia, Neutral Zone
- Iran
- Iraq
- Somalia

[Add New Nationality] [Add New Ethnicity to Nationality] [Remove Nationality / Ethnicity]

Languages:

Albanian, Arbëreshë	X	Amharic	X	Arabic	X
Assyrian	X	Bosnian	X	Burmese	X
Chaldean	X	CHIN	X	CHIN LAI	X
Chin-Falam	X	Chin-Khumi	X	Chin-Matu	X
Chin-Mindat	X	Chin-Mizo	X	Chin-Senthang	X
Chin-Siyin	X	Chin-Thado	X	Chin-Zaniat	X
Chin-Zokhua	X	Croation	X	Dari	X
Dinka	X	Dzongka	X	Falam	X
Farsi, Eastern	X	Farsi, Western	X	French	X
Karen	X	Kinyamulenge	X	Kinyarwanda	X
Kirundi	X	Kiswahili	X	Kunama	X
Lingala	X	Nepal	X	Oromo, West Central	X
Pashto, Northern	X	Russian	X	Serbian	X
Sgaw Karen	X	Somali	X	Spanish	X
Thai	X	Thai, Northeastern	X	Tigrinya	X

[Add New Language]

Employment	Outmigration
FY11=46%, FY12=71%, FY13=--%	FY11=7%, FY12=14%, FY13=--%
Timeliness	**Corrections**
FY11=0%, FY12=29%, FY13=--%	FY11=6%, FY12=0%, FY13=--%

Housing/Apt Costs	
1 bedroom	$550.00 with utilities
2 bedroom	$650.00 with utilities
3 bedroom	$900.00 with utilities

Notes: (0/8000 characters used)

○ Supervisor Approval
○ Request a Data Update / Additional Information Needed
○ Accept Affiliate Changes

[Save] [Cancel]

Fields marked by an asterisk (*) are required.

History

Date / Time	Status	Remarks	Changed By
2/8/2012 2:43 PM	Accepted		KEITH WILLIAMS
2/7/2012 12:23 PM	Submitted	Verified by Craig Thoresen - Director	ROSEMARY HAWKINS
10/31/2011 6:31 PM	Submitted	Verified by Craig Thoresen - Director	ROSEMARY HAWKINS
7/25/2011 1:08 AM	Pending		CLIFTON MURPHY

Program Capacity

Use the Program Capacity tab to enter data pertaining to arrivals projections. Here you will be able to create new R&P and MG fiscal years, as well as update existing ones.

Click **Add** under the R&P Fiscal Year grid to enter a new fiscal year or click the fiscal year link to modify an existing one. The SIV, RA and DOS goals entered here will display on the FFY Arrivals by Affiliate report. Upon completion, click **Save**.

E-mail Announcements

This function allows the administrator to send an e-mail announcement to selected user groups. From the dashboard, click on **E-mail Announcements**. When the screen pictured below opens, check the groups to whom you would like to send the announcement. If you would like to send it to all IRIS users, check all the groups. Type in your **Subject**, and then the **Body** of your e-mail in the designated fields. When finished, click **Send**.

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Send E-Mail Announcement Notifications to Groups

☐ Gives ability to run ASAR queries
☐ Affiliate Case Management Staff
☐ Affiliate Case Management Staff with Medical Permissions
☐ Affiliate MG Staff
☐ Affiliate Supervisor
☐ URM Affiliate User

☐ URM Site Supervisor Permissions
☐ IRIS Application
☑ IRIS User Administrator
☐ Loan Web-Service Staff
☐ Read Only Override
☐ VOLAG Case Management Staff

☐ VOLAG Loan Manager
☐ VOLAG Matching Grant Staff
☐ Shows Pre-Arrival Notifications
☐ VOLAG login with access only to reports
☐ R&P Reporting Staff

Subject: *
Sample E-Mail Announcement

Body: *
This is a sample of an IRIS-generated E-Mail Announcement.

Send   Cancel

IRIS confirms that your e-mail has been sent.

Message from webpage

⚠ 1 Email(s) has been sent to 1 group(s)

OK
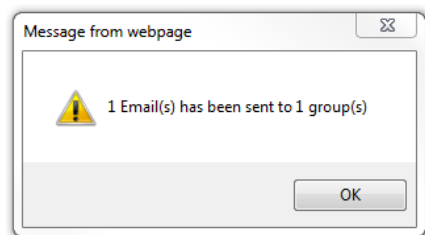
Managing Forms in IRIS

Many of the forms used by the RAs and affiliates are available in IRIS as document templates. They can be viewed, saved, or printed. New templates can be added. Existing templates can be replaced or changed. The templates can also be downloaded and saved to a local system, where staff may complete them and then upload the completed version to the appropriate location in IRIS. Affiliate staff may also wish to print the forms for inclusion in the case file.

Use the **All Forms** function if you would like to view, save or print a template in IRIS. This link is available to all IRIS users, regardless of permission level.

Use the **Form Template Maintenance** function to:
- Add a new template
- Replace an older version of a template with a new one
- Change the name of a template or its location within IRIS

This link is only available to resettlement agency users.

To manage forms within a case, go to the appropriate screen for the case and utilize the Add Attachment and Templates dropdowns.

View, Save or Print a Form Template

To view, save or print a template in IRIS, click on the **All Forms** link, as shown above. The **Form Templates** screen will open. This screen lists the **name** and **type** of form: Anchor, AOR, Assurance, Cosponsor, Individual, Matching Grant Case, Organization, Case, or Interest. The **Type** also indicates where in IRIS the form template may be accessed and where completed versions will be uploaded. For example, a completed Anchor/Friend Assessment Form would be uploaded to IRIS from the Anchor Forms screen.

The **Form Templates** screen also lists the update date and the user who last updated the form.

To open a form template, click on the link associated with its name.

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

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Form Templates

Name	Type	Update Date	Update User
30 Day Follow Up For Minors	Individual	3/31/2006	ERIKA OLIVER
Anchor Relative or Co-Sponsor Commitment Form	Anchor	6/21/2006	ERIKA OLIVER
Anchor Relative or Co-Sponsor Commitment Form	Cosponsor	6/21/2006	ERIKA OLIVER
Anchor/Friend Assessment Form	Anchor	1/30/2008	ERIKA OLIVER
Assurance Documentation	Assurance	3/31/2008	ERIKA OLIVER
Case File Checklist FY 2012	Case	6/19/2012	VELMA ANDERSON
Case File Checklist FY 2012 (with guidance)	Case	6/19/2012	VELMA ANDERSON
Class A Medical Addendum	Assurance	7/27/2009	CALVIN HARPER
Class A Medical Documentation (PRINT ONLY)	Organization	5/18/2009	CLIFTON MURPHY
Client Documentation	Case	8/25/2010	CLIFTON MURPHY
Congregational Assistance Form	Cosponsor	4/23/2006	ERIKA OLIVER
Core Service Checklist FY 2012	Case	6/19/2012	VELMA ANDERSON
Core Service Checklist FY 2012 (with guidance)	Case	6/19/2012	VELMA ANDERSON
Documentation Attachment	AOR	12/13/2006	ERIKA OLIVER
Home Evaluation and Safety Checklist FY 2012	Case	1/19/2012	VELMA ANDERSON
Home Evaluation and Safety Checklist Guidance	Case	1/19/2012	VELMA ANDERSON
Home Supply List FY 2012	Case	1/19/2012	VELMA ANDERSON
Home Supply List Guidance	Case	1/19/2012	VELMA ANDERSON
Match Summary Sheet 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
Medical Anomaly Report	Individual	7/10/2012	FRED GRAY
MG Agreement Form	Matching Grant Case	10/17/2012	CARMEN GARRETT
MG Case Closure Letter 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Case Note Checklist 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Cash and In Kind Log 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Cash and In Kind Summary 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Federal Dollar Dissbursement 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Housing Agreement Form 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Pre and Post Employment Budget 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Sanctioning Guidance	Matching Grant Case	10/17/2012	CARMEN GARRETT
Minor's Note Page	Individual	4/14/2009	CLIFTON MURPHY
Minor-Guardianship Documentation	Individual	5/18/2009	CLIFTON MURPHY
Orientation Checklist	Case	6/21/2006	ERIKA OLIVER
P3 AOR	Interest	10/22/2012	CLIFTON MURPHY
REHA Case Eligibility Form	Case	7/21/2009	CLIFTON MURPHY
Request for Placement Exception	Assurance	7/8/2008	ERIKA OLIVER
Resettlement/Employment Plan	Individual	5/14/2007	ERIKA OLIVER
Resettlement/Employment Plan	Case	9/27/2012	COURTNEY WATSON
Sample of a new Form Template	Case	2/13/2013	ALAN WEAVER
Supporting Documentation	Interest	9/26/2012	CLIFTON MURPHY
U.S Tie Updated Information	Anchor	11/10/2009	JUDY GONZALEZ

The form template will open in a new window as a Word document, as shown on the next page. You may save or print it as you would any Word document.

Add, Replace or Change a Form Template

Add New Template

To add a new form template, replace an older version of a template with a new one, or change the name or location of a template, start from the dashboard and click on **Form Template Maintenance**.

If you would like to make a new form template available in IRIS, click on the **Add New Form Template** button at the bottom of the screen, as shown on the next page.

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Form Template Maintenance

Name	Type	Update Date	Update User
30 Day Follow Up For Minors	Individual	3/31/2006	ERIKA OLIVER
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Documentation Attachment	AOR	12/13/2006	ERIKA OLIVER
Anchor/Friend Assessment Form	Anchor	1/30/2008	ERIKA OLIVER
Anchor Relative or Co-Sponsor Commitment Form	Anchor	6/21/2006	ERIKA OLIVER
Anchor Relative or Co-Sponsor Commitment Form	Cosponsor	6/21/2006	ERIKA OLIVER
Resettlement/Employment Plan	Case	9/27/2012	COURTNEY WATSON
Supporting Documentation	Interest	9/26/2012	CLIFTON MURPHY
Resettlement/Employment Plan	Individual	5/14/2007	ERIKA OLIVER
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Request for Placement Exception	Assurance	7/8/2008	ERIKA OLIVER
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Class A Medical Documentation (PRINT ONLY)	Organization	5/18/2009	CLIFTON MURPHY
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Client Documentation	Case	8/25/2010	CLIFTON MURPHY
Home Supply List FY 2012	Case	1/19/2012	VELMA ANDERSON
Home Supply List Guidance	Case	1/19/2012	VELMA ANDERSON
Home Evaluation and Safety Checklist FY 2012	Case	1/19/2012	VELMA ANDERSON
Home Evaluation and Safety Checklist Guidance	Case	1/19/2012	VELMA ANDERSON
Match Summary Sheet 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Case Closure Letter 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Pre and Post Employment Budget 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Case Note Checklist 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Housing Agreement Form 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Cash and In Kind Summary 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Cash and In Kind Log 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
MG Federal Dollar Dissbursement 2012	Matching Grant Case	3/12/2012	CARMEN GARRETT
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Medical Anomaly Report	Individual	7/10/2012	FRED GRAY
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MG Sanctioning Guidance	Matching Grant Case	10/17/2012	CARMEN GARRETT
MG Agreement Form	Matching Grant Case	10/17/2012	CARMEN GARRETT

[Add New Form Template] [Cancel]

A dialog box will open. Enter the name of the new form template and then choose the type from the dropdown. The type you select will determine where in IRIS completed versions of the form will be uploaded and accessed. Click on the **Browse** button to look for the template you have saved on your system.
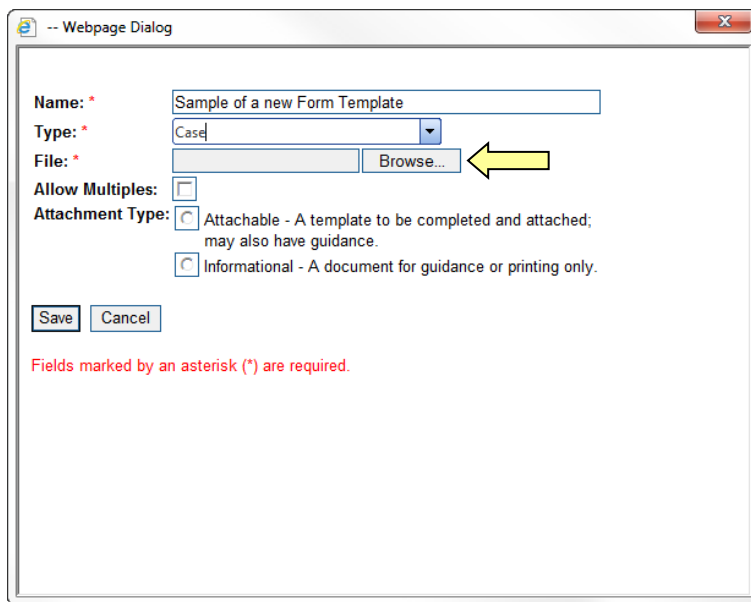
Select the document name and click open.
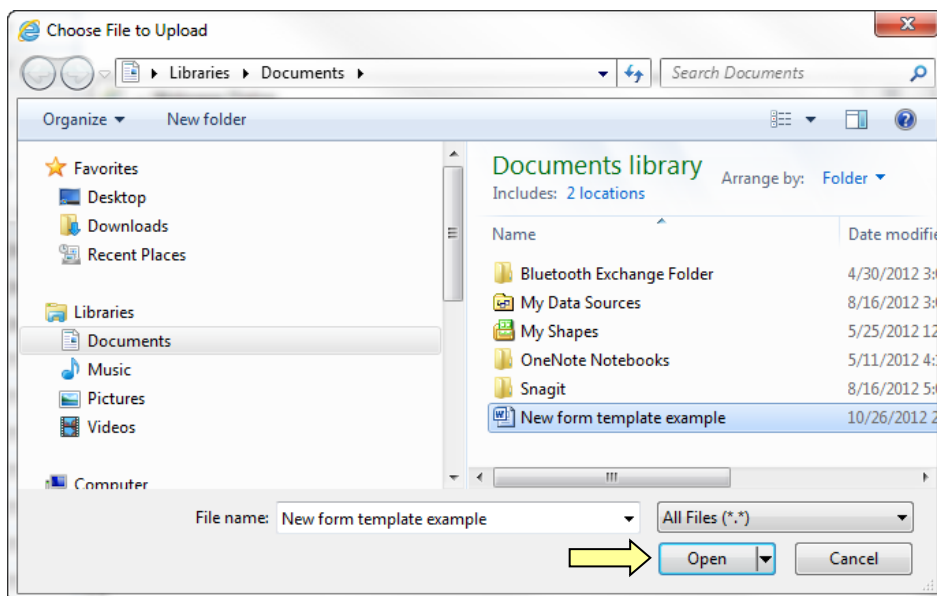
The file path now appears in the **File** field. If you need the ability to upload multiple versions of this form, check the **Allow Multiples** checkbox. Note that this function allows the user to upload multiple *completed versions* of a form (eg, an AOR), not multiple form templates. Next, indicate whether this template is **Attachable** (a template to be completed and attached; may also have guidance) or **Informational** (a document for guidance or printing only). When finished, click **Save**.

The template is now listed on both the **All Forms** and **Form Template Maintenance** screens.

Since **Case** was entered as the form template type, this template can also be accessed from the **Case Forms** tab in the **Post-Arrival** Section of the Case screen, as shown on the next page.

Replace an Existing Template

To replace an existing template, select it from the **Form Template Maintenance** screen. Make any necessary changes to the **Name** and **Type**. Use the **Browse** button to locate the file with which you wish to replace the current file.

The new file name will display in the **New File** field. Click **Save** to complete the replacement.

Change a Template's Name or Location

To change the name or location of an existing template, select it from the **Form Template Maintenance** screen. Make the necessary changes to the **Name** and **Type** and click **Save**.

If you modified the Name field, the new name will now display in the Form Template Maintenance and All Forms grids in the Name column. It will also be included in the

Add Attachment and Templates dropdowns in the forms screens associated with the Type that was entered.

If you modified the Type field, the new type will now display in the Form Template Maintenance and All Forms grids in the Type column. Also, the type will determine the locations (forms screens) where the template will display in the Add Attachment and Templates dropdowns.

Inserting Field Codes

Field codes provide the ability to automatically include case information into a downloaded MS Word or Excel template. For example, if you are on the Post Arrival, Case Forms tab and there is a template containing the field code <Arrival_Date>, then the case's arrival date will be inserted into the template when it is downloaded.

Process for adding field codes

1. Create a MS Word or Excel document with the field code inside brackets (< >). For example, <Case_Number>
2. As an RA user, click Form Template Maintenance
3. Add the new template that contains the field codes
4. Be sure to check the box for "Contains field codes?" when adding the template
5. Download the template from one of the following IRIS locations and the document will replace the field code with the case's data.
    a. Case
    b. Assurance
    c. US Tie

     d. Co-sponsor

     e. Individual

     f. Matching Grant Case

NOTE:

    i.   There must not be any spaces between the brackets or the data will not populate.

    ii.   Field codes do not work in Excel merged table cells.

    iii.   An Excel form template must not contain images.

    iv.   Co-sponsor information is available only for the cosponsor marked as the "primary cosponsor".

Correct	Incorrect
<Case_Number> No spaces	< Case_Number> There is a space between < and C

Listing Individuals Information

To list information of all members on a case, use the following special field codes for R&P and MG cases respectively.

1. <CaseMembers>
2. <MGCaseMembers>

Place the CaseMembers or MGCaseMembers tags in the table row above the data. In the example below, a new row is created for each case member.

Name <CaseMembers>	Alien Number
<Full_Name>	<Alien_Number>

The downloaded template would look like this.

Name	Alien Number
Alicia Adkins	111111111
Phillip Adkins	111111112
Sarah Adkins	111111113

R&P cases members will be listed by the WRAPS sequence number. MG case members will have the same order as the IRIS MG case member screen.

List of Field Codes

This table lists the field codes that may be embedded in MS Word and Excel templates.

Field Code Type	Field Code Tag	Description
Global	<RA_Abbreviation>	RA Abbreviation

	<Date_Today>	Today's Date (MM/DD/YYYYY)
Case	<Case_Number>	Case Number
	<Case_Size>	Case Size
	<Case_Pool>	Case Pool
	<Proflight_Number>	Proflight Number
	<Arrival_Date>	Port of entry Arrival Date
	<Arrival_Time>	Time part of Arrival Date
	<Arrival_Airport>	
	<Final_Arrival_Date>	Final destination arrival date. May differ from port of entry arrival date.
	<Final_Arrival_Time>	
	<Final_Airport>	
	<90th_Day>	90th day from arrival
	<60th_Day>	60th day from arrival
	<30th_Day>	30th day from arrival
	<Placed_Affiliate>	Placed Affiliate
	<Placed_Affiliate_Full_Name>	Placed Affiliate Full Name
	<Placed_Affiliate_Address>	Placed Affiliate Address
	<Placed_Affiliate_City>	Placed Affiliate City
	<Placed_Affiliate_State>	Placed Affiliate State
	<Placed_Affiliate_Zipcode>	Placed Affiliate Zip Code
	<PA_First_Name>	PA First Name
	<PA_Last_Name>	PA Last Name
	<PA_Last_Name2>	PA Last Name2
	<PA_Middle_Name>	PA Middle Name
	<PA_Full_Name>	PA Full Name (Last Name, Last Name2, First Name, Middle Name)
	<PA_Alien_Number>	PA Alien ID
	<PA_SSN>	PA SSN
	<PA_DOB>	PA Date of Birth
	<PA_Nationality>	PA Nationality
	<PA_Gender>	PA Gender
	<PA_Address>	PA Address
	<PA_City>	PA City
	<PA_State>	PA State
	<PA_Zipcode>	PA Zip Code
	<PA_Phone_Number_Home>	
	<PA_Phone_Number_Work>	
	<PA_Phone_Number_Mobile>	
Assurance	<Target_Assurance_Date>	Target Assurance Date
	<Assurance_Date>	Assurance Date

US Tie	<US_Tie_Full_Name>	
	<US_Tie_First_Name>	
	<US_Tie_Middle_Name>	
	<US_Tie_Last_Name>	
	<US_Tie_Last_Name2>	
	<US_Tie_PA_Relationship>	Relationship To Case Member
	<US_Tie_Arrival_Date>	UST PA Relationship
	<US_Tie_Address>	US Address
	<US_Tie_City>	City
	<US_Tie_State>	State
	<US_Tie_Zipcode>	Zip
	<US_Tie_Phone1>	Phone 1
	<US_Tie_Phone2>	Phone 2
	<US_Tie_Email>	Email
Individual	<First_Name>	First Name
	<Last_Name>	Last Name
	<Last_Name2>	Last Name2
	<Middle_Name>	Middle Name
	<Full_Name>	Full Name
	<Sequence_Number>	Sequence Number WRAPS sequence number. If not a WRAPS case then sequence will be generated in order of entry into the database.
	<WRAPSSequence>	WRAPS Sequence Number
	<Alien_Number>	Alien ID
	<SSN>	SSN
	<DOB>	Date of Birth
	<Gender>	Gender
	<IsMGEmployable>	Is MG Employable
	<Minor_Code>	Minor Code
	<Address>	Address
	<City>	City
	<State>	State
	<Zipcode>	Zip Code
	<Relation_To_PA>	Relation to PA
Matching Grant Case	<MG_Eligibility_Date>	MG Eligibility Date
	<MG_Enrollment_Date>	MG Enrollment Date
	<MG_Program_Year>	MG Program Year

	<MG_120th_Day>	MG 120th Day
	<MG_180th_Day>	MG 180th Day
	<MG_Case_Size>	MG case size which may be different from RP case size
Co Sponsor	<Cosponsor_Organization_Name>	Cosponsor name
	<Cosponsor_Contact_Full_Name>	Cosponsor contact full name
	<Cosponsor_Address>	Cosponsor address
	<Cosponsor_City>	Cosponsor city
	<Cosponsor_State>	Cosponsor state
	<Cosponsor_Zipcode>	Cosponsor zipcode
	<Cosponsor_Phone>	Cosponsor phone
	<Cosponsor_Phone_Mobile>	Cosponsor mobile
	<Cosponsor_Email>	Cosponsor email
AOR	<IRIS_Pre_CaseID>	123456779-12Feb2021
	<AOR_Type>	P3
	<Affiliate>	TX - Austin
	<AOR_Status>	Submitted to RPC
	<AOR_Last_Submitted_Date>	3/22/2020
	<AOR_Case_Size>	3
	<Qualifying_UST_Parent_First_Name>	All field codes beginning with Qualifying UST are from the following sections. **Lautenberg**: tab "US Tie", SECTION II Information about the US Tie **CAM**: tab Qualifying Parent, SECTION I Information about the qualifying parent **P3**: tab U.S. - Based Family Member, SECTION I. Information about the U.S. Based Family Member John
	<Qualifying_UST_Middle_Name>	Joseph
	<Qualifying_UST_Last_Name>	Campbell
	<Qualifying_UST_Full_Name>	John Joseph Campbell
	<Qualifying_UST_Sex>	Male
	<Qualifying_UST_Birth_Date>	1/5/1994
	<Qualifying_UST_Birth_City>	Kinshasa
	<Qualifying_UST_Birth_Country>	Dem. Rep. Congo
	<Qualifying_UST_US_Address_Street>	800 Light St.
	<Qualifying_UST_US_Address_City>	Baltimore
	<Qualifying_UST_US_Address_State>	Maryland
	<Qualifying_UST_US_Address_Zipcode>	21209

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Upload Forms to a Case

To complete a form for a case and upload it into IRIS, go to the appropriate screen and click the **Templates** dropdown. Once you have selected the form that you wish to download, a **Download** link will appear. Click on that link, complete the form, and save the form on your system.

Now that you have completed the form, you are ready to attach it to the case. To do so, click the **Add Attachment** dropdown. Once you have selected the type of document you will be attaching, a **Description/Comment** field and an **Upload File** field will appear. Add a comment if you desire and click **Browse** to locate the file you saved on your system. Upon selection, the name of the file will display in the Upload File field. Click **Save File** to complete the process of uploading the form to the case.

After attaching the file, the form will be listed in a grid containing information about it. You can click on the link under the **Attachment Type** to open and view the document.

Delete Forms from a Case

To remove forms that have been added to a case, click in the **Remove** boxes next the documents you wish to remove and then click **Remove Selected**.

A confirmation pop-up will display.
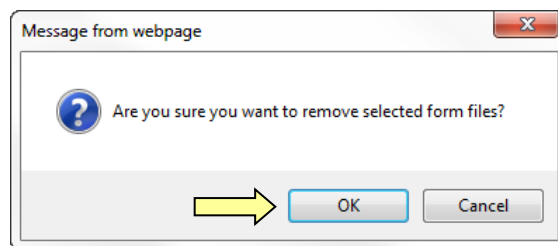
If you click **OK**, the Attachment Type names will be grayed out and you will no longer be able to open the forms for viewing, as you can see on the next page.

Custom Fields Maintenance

As an IRIS Administrator, you may add fields unique to the needs of your agency. These non-standard IRIS fields are called custom fields.

To add a custom field, perform the following steps.

1. Choose the Table:

Table	IRIS Screen
Case Member	Pre-arrival member screen
IRIS Case	Pre-arrival case screen
QC Report	Quarterly Consultation screen

2. Click button Add Custom Field and complete the form

Custom Field Properties	Description
Name	The name for the field as it will appear on the screen.
Data Type	Bit = True or False Date = date DateTime = date and time Integer = whole number without a fractional component Lookup = list (e.g. apple, orange, pear) Numeric = number with fractional component

	Text = open text
Data Size	Applicable to these data types: Integer Numeric Text
Data Size2	Applicable to numeric data types
Field Type	Defaults to keyboard For data type Lookup, options are Dropdown or Multi-choice
Field Height	Applicable to data type Text
Lookup Type	Applicable to data type Lookup Requires a look up field be created from original custom field screen using button labeled Edit Lookups
Use For Search	Check to include field in case Advanced Search

3. Click Save button.
4. Click Edit Lookups
   a. To edit an existing lookup, click the name from the table of lookup
   b. Click Add Lookups to add a new Lookup list
      i. Give the lookup list a name and click Save
      ii. Click Manage Lookups to add values
      iii. Click Add Lookup Value and proceed to add and save each value
   c. Save all changes
5. Finally, to save all Custom Fields and Lookups click Save Updates button
   a. This process takes several minutes. During the process, the button will become disabled and the label will read "Saving updates in progress"

Custom Fields Maintenance

Table: Case Member ▾

Case Member
IRIS Case
QC Report

N			Field Type	XML Updated	Use For Search	Date Created

Add Custom Field | Cancel | Edit Lookups | Save Updates

Figure 1. The primary screen used to manage custom fields.

Custom Fields and Custom Reports

Custom fields for "Case" and "Cultural Orientation Member" may be used in IRIS custom reports. When the "Save Updates" button from step 5 above is clicked, the custom report data sources below are updated to include the custom field.

- IRIS_CASE_CUSTOMFIELDS
- IRIS_COAMEMBER_CUSTOMFIELDS