

Matching Grant Data Collection Guidelines - In Response to ORR FY24 Updates

Updated: August 15, 2024

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Introduction:

To align with the changes in Matching Grant data collection and the additional data points required by ORR, IRIS is introducing a new feature. This functionality will allow users to manage a checklist of tasks, enabling them to input additional data, log notes, and attach documents directly to the case.

Pre-Requisite

Case is enrolled in Matching Grant Program.

Steps

1. Navigate to Matching Grant tab

Begin by navigating to the Matching Grant tab on the Case. The tab lists the MG enrollment information and the number of case members enrolled in the MG Program.

MG Eligibility Date: 7/23/2024		Enrolled Programs: VR&P, MG		
Pre Arrival	Post Arrival	RP Case Notes	Matching Grant	Other Programs
RPC BioData	Placement	Assurance	Pre-Case Documents	Travel
Case	Member	Cross Reference		

Background Case Information [\(Edit\)](#)

Case Number: AA - 901153214 -
Case Type: R&P

1. Matching Grant lists Program Enrollment details including the number of case members enrolled in the program and MG case updating history.

Date: 7/23/2024		Enrollment Date: 7/23/2024	
Pre Arrival	Post Arrival	RP Case Notes	Matching Grant
MG Enrollment Date: 7/23/2024		Reporting Year: 2024	
MG Case 1			
Members: Fan, George			
Open Case File	Edit Enrollment		

Members Not Enrolled:

Name	Relation	Alien Number
Test, Blake	AB	901152147483647
Test, Oleksandr	AB	901153214743647
Test, Aaron	AS	901153214748365

[Unenroll All from MG](#)
[Change MG Enrollment Date](#)
[Override](#)
[Unlock](#)

MG Case Updating History

Action	Reason	Date	Updated By
Add MG case member	Fan, George was added to MG case.	7/23/2024 9:40 PM	Shiva Tripathi
Enroll in MG	Case enrolled in MG. MG Enrollment Date 7/23/2024, MG Case ID 24909.	7/23/2024 9:40 PM	Shiva Tripathi
Unenroll from MG	Case unenrolled from MG Case ID 24809	7/23/2024 9:23 PM	Shiva Tripathi
Add MG case member	Fan, George was added to MG case.	7/16/2024 9:23 PM	Shiva Tripathi

2. Click on the **Open Case File** button.

Date.

Pre Arrival Post Arrival RP Case Notes Matching Grant Other Programs

MG Enrollment Date: 7/23/2024 Reporting Year: 2024

MG Case 1
Members: Fan, George
Open Case File Edit Enrollment

Unenroll All from MG Change MG Enrollment Date Override Unlock

- Case File button opens Matching Grant page that lists all the tabs associated with the MG Program and the Case member information under **MG Main** tab.
- Click on the **Tasks** tab.

MG Enrollment Date: 7/23/2024 240 Day Status:

MG Main Finances MG Case Notes Case Forms Tasks

Employable?	Name	Relation	Alien #	Enrollment Age
Yes	Fan, George	PA	901153214748364	44 years, 6 months, 22 days

Note: Arrival date is used for 180th and 240th day.

2. Matching Grant – Services and Tasks

The Tasks tab now includes four newly added Services and Tasks. These tasks align with new ORR-required data collection points, particularly those that require user input and are automatically populated when a case is enrolled in the MG Program.

MG Enrollment Date: 7/23/2024 240 Day Status:

MG Main Finances MG Case Notes Case Forms Tasks

Tasks

Program MG

Service Name	Task Name	Member	Status	Complete Date	Start Date	End Date	Actions
MG Data Collection	EAD Application	Fan, George	Pending		5/19/2025		Add Add
MG Data Collection	Housing Assistance	Fan, George	Pending		5/19/2025		Add Add
MG Data Collection	SNAP Application	Fan, George	Pending		5/19/2025		Add Add
MG Data Collection	SSC Application	Fan, George	Pending		5/19/2025		Add Add

MG Services and Tasks

1. Clicking on a **Task** opens a small window of “**Case Service Task**”.

MG Enrollment Date:		7/23/2024		240 Day Status:	
MG Main	Finances	MG Case Notes	Case Forms	Tasks	

Tasks

Program MG

Service Name	Task Name	Member	Status	Due Date	Notes	Attachments
MG Data Collection	EAD Application	Fan, George	Pending	5/19/2025	Add	Add
MG Data Collection	Housing Assistance	Fan, George	Pending	5/19/2025	Add	Add
MG Data Collection	SNAP Application	Fan, George	Pending	5/19/2025	Add	Add
MG Data Collection	SSC Application	Fan, George	Pending	5/19/2025	Add	Add

2. The window shows pre-filled information, including the Program Name, Service, Task, Task Description, and Case Member, along with additional required details that need user input for better tracking of the task progress, as explained next.


Program:	MG
Service:	MG Data Collection
Task:	EAD Application
Description:	Confirmation and Submission date of EAD.
Member:	Fan, George
Assigned Caseworker:	Select Caseworker
Activity Method:	Select Activity Method
Status:	Pending
Completed Date:	
Due Date:	5/19/2025
Is Required:	<input checked="" type="checkbox"/>
EADAppSubmitted	
EADAppSubDate	
EADReceived	
EADReceivedDate	

Save **Cancel**

Fields marked by an asterisk (*) are required.


- **Assigned Caseworker:** By default, the case worker handling the case will be automatically populated. If the Matching Grant tasks need to be assigned to a different case worker, case managers can easily select them from the drop-down menu.

Program:	MG
Service:	MG Data Collection
Task:	EAD Application
Description:	Confirmation and Submission date of EAD.
Member:	Fan, George
Assigned Caseworker:	<div> <div>Select Caseworker</div> <div> Select Caseworker Al , SA Aljuboori, Hadeel Eley, Lakeisha Espana, Alex 5/19/2025 </div> </div>
Activity Method:	
Status:	
Completed Date:	
Due Date:	5/19/2025
Is Required:	<input checked="" type="checkbox"/>



- **Activity Method:** Drop down lists the options of Email, Phone, In Person, Message or Video Call. Select the Activity Method used to contact case member when working on the task. This ensures a thorough record of all actions taken, maintaining documentation of communication and collaboration efforts.

Program:	MG
Service:	MG Data Collection
Task:	EAD Application
Description:	Confirmation and Submission date of EAD.
Member:	Fan, George
Assigned Caseworker:	<div> <div>Select Caseworker</div> <div> Select Caseworker Al , SA Aljuboori, Hadeel Eley, Lakeisha Espana, Alex 5/19/2025 </div> </div>
Activity Method:	<div> <div>Select Activity Method</div> <div> Select Activity Method Email Phone In Person Message Video Call </div> </div>
Status:	
Completed Date:	
Due Date:	
Is Required:	<input checked="" type="checkbox"/>



- **Status:** Drop down options list as pending, Completed, Declined by Client or Not Applicable. Monitor the progress of tasks by tracking their status. By default, task status list as "Pending".
 - a During the process of Application submission and the submitted date, the status of the task will show as '**Pending**'.
 - b When approved and the document received, the status should be marked as '**Complete**'

- c **'Declined by Client'** is when the member refuses the service. For Example, Housing Assistance or SNAP Application. If the client rejects housing or SNAP assistance, the Status should be marked as 'Declined by Client'.
- d If a case member is not eligible for the Service such as EAD. Minors are not eligible for EAD. For minor members the status should be marked as **'Not Applicable'**.

Activity Method: Select Activity Method

Status: Pending

Completed Date:

Due Date:

Is Required:

EADAppSubmitted

Select the applicable status

- **Completed Date:** Mark tasks as completed by entering the date of completion manually or by navigating and choosing a date from the calendar icon. This action updates the task status and allows for the closure of completed tasks within the case management system.

Status: Pending

Completed Date:

Due Date: 5/13/2025

Is Required

EAD Application Submitted

EAD Application Submission Date

EAD Received

Enter or select the date

- **Due Date:** Similarly, 'Due Date' for the task auto populates based on the case enrollment date into the MG Program.

Due Date: 5/19/2025

Is Required:

- **Is Required:** Checkbox is by default selected as the task is marked as required during the task creation.

Due Date: 5/13/2025

Is Required: ☒

EAD Application Submitted

3. ORR Required Additional Data Collection Points

In line with ORR requirements, additional data collection points have been added to MG Tasks in IRIS. These data points are consistent across all tasks (**EAD, SNAP, and SSC**) except for the '**Housing Assistance**' Service Task. The EAD application is mandatory for all eligible adult case members, and the SSC application must be completed for all case members. Below is a step-by-step guide to the additional data collection for these tasks.

3.1. EAD (Employment Application Determination) Application

- **EAD Application Submitted:** Dropdown lists options as Yes, No, N/A. Case worker selects the option based on the status.
 - Select '**Yes**' to confirm submission of the application for all adult case members.
 - '**N/A**' should be selected for minors. After making this selection, case worker is required to update the status of Task as '**Not Applicable**' and click '**Save**'.

The screenshot shows a form with four fields: 'EAD Application Submitted', 'EAD Application Submission Date', 'EAD Received', and 'EAD Received Date'. The 'EAD Application Submitted' dropdown menu is open, showing options: 'Yes', 'No', and 'N/A'. A green arrow points to the 'Yes' option, and a green callout bubble says 'Select applicable option'.

- **EAD Application Submission Date:** This information depends on EAD Application Submission. If EAD application is submitted, user selects the date of submission and Click '**Save**'.

The screenshot shows the 'EAD Application Submitted' dropdown menu set to 'Yes'. The 'EAD Application Submission Date' field is highlighted with a green box and contains the date '8/6/2024 8:00'. A green arrow points to this field, and a green callout bubble says 'Enter or select the date and click Save'. Below the date field is a calendar for August 2024. The 'Save' button is visible at the bottom left.

At this stage the Task remains incomplete as this is a follow-up task. Once the EAD application has been submitted, there is an approval process that correlates to the EAD Received. During this process, the Task status will show as **'Pending'**.

- **EAD Received:** If the EAD is approved and received, the case workers can select from **'Yes'**, **'No'**, or **'N/A'**. Choice of status is relative to if the EAD application was approved or denied.

EAD Received

EAD Received Date

Save Cancel

Fields marked by an asterisk (*) are required.

Select applicable option

- **EAD Received Date:** Case worker enters the date when the EAD was received based on the EAD Received status.

Is Required:

EAD Application Submitted

EAD Application Submission Date

EAD Received

EAD Received Date

Save Cancel

Fields marked by an asterisk (*) are required.

Date can be entered manually or selected

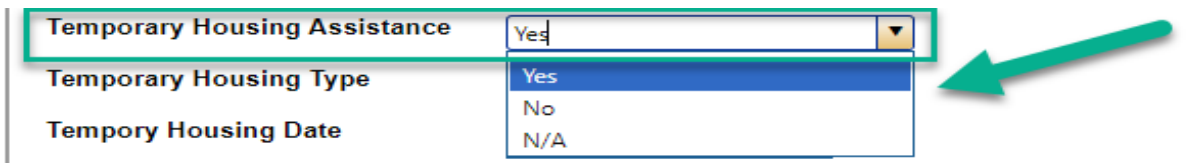
Note: Updates the status of Task depending on application approval and/or denial and click **'Save'**

3.2. Housing Assistance

Data collection points for Housing Assistance are a bit different from EAD, SNAP and SSC Application tasks. For Housing Assistance, ORR requires information on the Temporary Housing Type if the assistance is provided.

Note: As mentioned above, if the client declines housing assistance, case worker should update the Status of Task as **'Declined by Client'** followed by selecting **N/A** from drop downs to log information for accuracy.

- **Temporary Housing Assistance:** Drop down lists' options of Yes, No, N/A. If the client agrees for temporary housing assistance, select Yes and enter the corelated information.



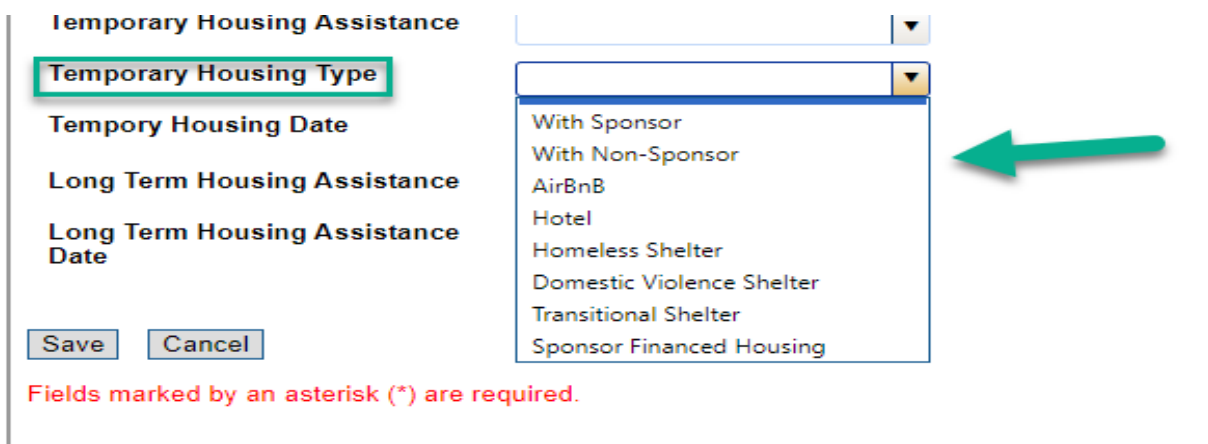
Temporary Housing Assistance: Yes

Temporary Housing Type: Yes

Temporary Housing Date: No

Temporary Housing Date: N/A

- **Temporary Housing Type:** The dropdown options include With Sponsor, With Non-Sponsor, Airbnb, Hotel, Homeless Shelter, Domestic Violence Shelter, Transitional Shelter, and Sponsor-Financed Housing. If housing assistance is requested, this information on the type of temporary housing provided is required by ORR. Here the case worker makes selection of housing type.



Temporary Housing Assistance: [Dropdown]

Temporary Housing Type: [Dropdown]

Temporary Housing Date: [Dropdown]

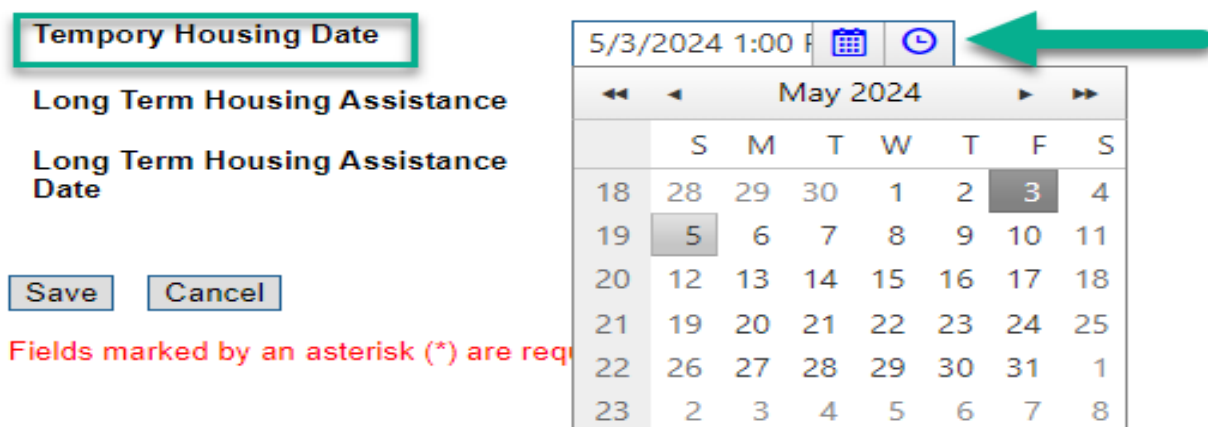
Long Term Housing Assistance: [Dropdown]

Long Term Housing Assistance Date: [Dropdown]

Save Cancel

Fields marked by an asterisk (*) are required.

- **Temporary Housing Date:** Next, select the date when the service was provided.



Temporary Housing Date: 5/3/2024 1:00 PM

Long Term Housing Assistance: [Dropdown]

Long Term Housing Assistance Date: [Dropdown]

Save Cancel

Fields marked by an asterisk (*) are required.

- **Long Term Housing Assistance:** Dropdown menu includes the options Yes, No, and N/A. Select the appropriate option based on whether long-term housing is provided. Since long-term housing is not a

required reporting point according to the new ORR data collection guidelines, specific types of long-term housing are not listed.

Long Term Housing Assistance

Long Term Housing Assistance Date

Save Cancel

- **Long Term Housing Assistance date** to be entered if the service was provided.

Temporary Housing Assistance

Temporary Housing Type

Temporary Housing Date

Long Term Housing Assistance

Long Term Housing Assistance Date

Save Cancel

Fields marked by an asterisk (*) are required.

3.3. SNAP (Supplemental Nutrition Assistance Program) Application

- **SNAP Application Submitted:** Like EAD Application Task, SNAP Application Task have the similar workflow. SNAP Application submitted dropdown lists options as Yes, No, N/A. Case worker selects the option based on the status.
 - Select '**Yes**' to confirm submission of the application
 - Selection of '**No**' or '**N/A**' status does not require further information.

SNAP Application Submitted

SNAP Application Submission Date

SNAP Approved

SNAP Approval Date

- **SNAP Application Submission Date:** As EAD, this information depends on SNAP Application Submission. If the application is submitted, user selects the date of submission and Click **'Save'**.

SNAP Application Submission Date

SNAP Approved

SNAP Approval Date

Save Cancel

Fields marked by an asterisk (*) are required.

8/23/2024 12:00

	S	M	T	W	T	F	S
31	28	29	30	31	1	2	3
32	4	5	6	7	8	9	10
33	11	12	13	14	15	16	17
34	18	19	20	21	22	23	24
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7

Again, at this stage the Task remains incomplete as this is a follow-up task. Once the application has been submitted, there is an approval process that correlates to SNAP Approved. During this process, the Task status will show as **'Pending'**.

- **SNAP Approved:** Here, the Case workers can choose from 'Yes,' 'No,' or 'N/A' depending on the approval or denial of the SNAP Application.

SNAP Approved

SNAP Approval Date

Save Cancel

Yes

No

N/A

Fields marked by an asterisk (*) are required.

- **SNAP Approval Date:** When SNAP Application gets approved, the Case worker enters the approval date here:

Is Required:

SNAP Application Submitted

SNAP Application Submission Date

SNAP Approved

SNAP Approval Date

Save Cancel

9/1/2024 12:00

	S	M	T	W	T	F	S
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7
37	8	9	10	11	12	13	14
38	15	16	17	18	19	20	21
39	22	23	24	25	26	27	28
40	29	30	1	2	3	4	5

Fields marked by an asterisk (*) are required.

Note: Update the Status of Task depending on application approval and/or denial and click 'Save'

3.4. SSC (Social Security Card) Application

- **Social Security Card Application Submitted:** Like EAD and SNAP Application Tasks, SSC Application have the similar workflow. As mentioned earlier, Social Security Card Application must be submitted for all case members.
 - Select 'Yes' to confirm submission of the application.

Social Security Card Application Submitted

Social Security Card Application Submission Date

Social Security Card Received

- **Social Security Card Application Submitted Date:** Once the SSC Application is Submitted, Case worker then selects the date of submission and Clicks 'Save'.

Social Security Card Application Submitted

Social Security Card Application Submission Date

Social Security Card Received

Social Security Card Received Date

Save Cancel

Field marked by an asterisk (*) are required

8/18/2024 12:00

August 2024

	S	M	T	W	T	F	S
31	28	29	30	31	1	2	3
32	4	5	6	7	8	9	10
33	11	12	13	14	15	16	17
34	18	19	20	21	22	23	24
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7

Again, at this stage the Task remains incomplete as this is a follow-up task. Once the application has been submitted, there is an approval process that correlates to SSC Received. During this process, the Task status will show as 'Pending'.

- **Social Security Card Received:** Upon receiving Social Security Cards, Case worked can update the status here.

Social Security Card Received


Social Security Card Received Date

Fields marked by an asterisk (*) are required.

Yes

Yes

No



- Social Security Card Received Date:** After confirming receiving of Social Security Card, case worker should provide the Received Date.

Completed Date:

Due Date:

Is Required:

Social Security Card Application Submitted

Social Security Card Application Submission Date



Social Security Card Received


Social Security Card Received Date

Fields marked by an asterisk (*) are required.

April 2025

	S	M	T	W	T	F	S
14	30	31	1	2	3	4	5
15	6	7	8	9	10	11	12
16	13	14	15	16	17	18	19
17	20	21	22	23	24	25	26
18	27	28	29	30	1	2	3
19	4	5	6	7	8	9	10



Note: Update the Status of Task depending on application approval and/or denial and click 'Save'

The above explained four Matching Grant Tasks and their associated fields, cover all the required data points that need manual entry and collection to meet the new reporting deadlines.