

# IRIS Post Arrival - User's Guide

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## 1. Introduction

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

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

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

This user guide aims to provide step-by-step instructions for users to efficiently navigate and utilize the features of the IRIS application and customize it according to their needs. For further reference use [IRIS Modernizaon Guide](#).

## 2. Pre-Requisite

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

## 3. Enroll a case into Program

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

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

The screenshot displays the IRIS application interface. The top navigation bar includes tabs for 'Pre Arrival', 'Post Arrival', 'RP Case Notes', and 'Other Programs'. The 'Other Programs' tab is active, showing a table of programs with columns 'Program', 'Date Start', 'Date End', and 'Added By'. A table with one row 'Virtual R&P' and 'Shiva Tripathi' is visible. Below the table is an 'Add Other Program' button. A red arrow points to this button. Another red arrow points to the 'Other Program Case Notes' section. Below this is a 'Virtual R&P' section with a 'Note Summary' table and an 'Add New Case Note' button. A red arrow points to the 'Add Other Program' button. To the right, a pop-up window titled 'Program - Google Chrome' is shown. It contains a dropdown menu for 'Program' with 'Virtual R&P' selected. Below this are fields for 'Abbreviation: VRP', 'Description: TEST', 'Start Date', and 'End Date'. A red arrow points to the 'Program' dropdown. At the bottom of the pop-up are 'Add', 'Clear', and 'Cancel' buttons. A note at the bottom states 'Fields marked by an asterisk (\*) are required.'

Program	Date Start	Date End	Added By
Virtual R&P			Shiva Tripathi

Virtual R&P

Note Summary	Note Date	Attachment
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Program: \* Virtual R&P

Abbreviation: VRP

Description: TEST

Start Date:

End Date:

Add Clear Cancel

Fields marked by an asterisk (\*) are required.

## 4. Generate Service Tasks associated with Program.

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

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

Service Name	Task Name	Member	Status	Completed Date	Due Date	Notes
Additional Services	<a href="#">Virtual Case Closure</a>				5/30/2024	<a href="#">Add</a>
Core Services	<a href="#">Virtual Wellness Visit #2</a>				3/21/2024	<a href="#">Add</a>
Core Services	<a href="#">Virtual Wellness Visit #1</a>				3/6/2024	<a href="#">Notes(1)</a>

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

Member	Status	Completed Date	Due Date	Notes
			5/30/2024	
			3/21/2024	
			3/6/2024	<a href="#">Notes(1)</a>
RKE, LARD			5/30/2024	

**(Note: Once you have made your selections, click "Save." Information will not be saved until you have clicked this button located at the bottom of the window. Clicking "Cancel" will result in the loss of any information entered up to that point.)**

#### 4.1 Auto Generation of 'Required' Tasks:

Tasks marked as "**Is Required**" are associated as post-arrival tasks and must be completed as soon as the case is confirmed with the given time period.

Program: \*

Service Name: \*

Description:

VR&P

Core Services

Core Services provided to refugees for resettlement under Virtual R&P Program.

Task	Is Required?	Due Date settings			
Access Local Services	<input checked="" type="checkbox"/>	Arrival Date	+ 90	Calendar Days	Remove
Completed an AR-11 Change ...	<input checked="" type="checkbox"/>	Arrival Date	+ 10	Calendar Days	Remove
Copy of EAD	<input checked="" type="checkbox"/>	Arrival Date	+ 90	Calendar Days	Remove
Copy of I-94	<input checked="" type="checkbox"/>	Arrival Date	+ 90	Calendar Days	Remove
Intake Assessment (Intake)	<input checked="" type="checkbox"/>	Arrival Date	+ 2	Business Days	Remove
Intake interview and assessment	<input checked="" type="checkbox"/>	Arrival Date	+ 2	Business Days	Remove
Copy of SSN	<input checked="" type="checkbox"/>	Arrival Date	+ 90	Calendar Days	Remove
Repay IOM Travel Loan	<input checked="" type="checkbox"/>	Arrival Date	+ 90	Calendar Days	Remove
Copy of Client Eligibility Docu...	<input checked="" type="checkbox"/>	Select Date From	+ 2	Business Days	Remove
Virtual Case Closure Meeting	<input checked="" type="checkbox"/>	Arrival Date	+ 2	Business Days	Remove
Service plan	<input checked="" type="checkbox"/>	Arrival Date	+ 2	Business Days	Remove

Add Task

Remove Save Cancel

Fields marked by an asterisk (\*) are required.

- These tasks are automatically generated when the Confirmed Arrival Date is set in the Case background.

Case ID:

Case Type:

Case Pool:

Affiliate:

PA Name:

MG Eligibility Date:

Case Size: 1

Processing Status: Allocated

Active Status: Active

Allocation Date: 8/16/2023

Assurance Date:

Projected Arrival Date:

MG Enroll Date:

Enrolled Programs: VR&P

Pre Arrival

Post Arrival

RP Case Notes

Matching Grant

Other Programs

Client Data

Financial Tracking

R&P Reports

Case Forms

Tasks

Activities

Tasks

Add Task

No tasks are generated as the case does not have confirmed arrival date

- Once the Arrival Date is confirmed, the 'Required Tasks' are listed along with their 'Due Dates.'

Case Pool: Free	Active Status: Active	Arrival Date: 6/1/2024
Affiliate: AM - Amarillo-TX		90 <sup>th</sup> Day: 8/29/2024
PA Name: NYAMITAVU, Immaculee		MG Enroll Date: VR&P
		Enrolled Programs: VR&P

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

## Tasks

Add Task							
Program VR&P							
Service Name	Task Name	Member	Status	Completed Date	Due Date	Notes	Attachments
Core Services	<a href="#">Access Local Services</a>				8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	RUGWANYINTARE, Rutungisha	Declined	6/1/2024	8/30/2024	<a href="#">Notes(1)</a>	<a href="#">Attachments(1)</a>
Core Services	<a href="#">Copy of EAD</a>	NYAMITAVU, Immaculee			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	UKOYAGENYE, Jolie			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	MWIBAGIZA, Mbitsemunda			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of I-94</a>	RUGWANYINTARE, Rutungisha			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of I-94</a>	NYAMITAVU, Immaculee			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of I-94</a>	UKOYAGENYE, Jolie			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of I-94</a>	MWIBAGIZA, Mbitsemunda			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of I-94</a>	NYAMBANGUKA, Gentile			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of SSN</a>	RUGWANYINTARE, Rutungisha			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of SSN</a>	NYAMITAVU, Immaculee			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of SSN</a>	UKOYAGENYE, Jolie			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of SSN</a>	MWIBAGIZA, Mbitsemunda			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of SSN</a>	NYAMBANGUKA, Gentile			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Repay IOM Travel Loan</a>				8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Completed an AR-11 Change of Address Form</a>				6/11/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Intake Assessment</a>				6/4/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Intake interview and assessment</a>				6/4/2024	<a href="#">Add</a>	<a href="#">Add</a>

## 4.2 Assign a Task to staff/Caseworker:

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

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





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

## 5. Logging a Case Note Task

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

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

Date.

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

### Tasks

Add Task

Program VR&P

Service Name	Task Name	Member	Status	Completed Date	Due Date	Notes	Attachments
Core Services	<a href="#">Complete AR-11 Change of Address form</a>		Provided	6/4/2024		<a href="#">Notes(2)</a>	<a href="#">Attachments(2)</a>
Core Services	<a href="#">Complete Initial Intake Assessment Form</a>		Accepted	6/12/2024		<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Complete Initial Intake Meeting</a>					<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Consent of IOM Travel Loan</a>					<a href="#">Add</a>	<a href="#">Add</a>

3. Case Task Notes tab open under 'Activities'. Click on 'Add New Note' button.

Pre Arrival	Post Arrival	RP Case Notes	Other Programs
Client Data	Financial Tracking	R&P Reports	Cultural Orientation
		Case Forms	Tasks
			<b>Activities</b>

### Case Task Notes

Task name : Access Local Services

Note Summary	Note Date	Attachment
<a href="#">Add New Note</a>		

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

Pre Arrival

Post Arrival


**RP Case Notes**

Other Programs

**Medical Information:** \* ☐ Yes ☒ No



**Note Summary:** \*

**Note Description:** \* 

abc **B** *I* U A ▾ 

Test

**Attached documents:**  No file chosen

**Note Date:** \*   

**Viewable by Affiliates :** ☒

Specifying that this note contains restricted medical information will prevent it from appearing to users who have not been given the appropriate permissions.

Fields marked by an asterisk (\*) are required.



## 5.1 Case Task Attachments:

Although attachments can also be added to case notes, the Attachments column allows affiliates to directly associate task-related documents, such as a copy of the EAD form, or upload intake assessment forms.

1. To upload documents, click on 'Add' under the Attachments.

**Add Task**

**Program VR&P**

Service Name	Task Name	Member	Status	Completed Date	Due Date	Notes	Attachments
Core Services	<a href="#">Access Local Services</a>				8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	RUGWANYINTARE, Rutungisha	Declined	6/1/2024	8/30/2024	<a href="#">Notes(1)</a>	<a href="#">Attachments(1)</a>
Core Services	<a href="#">Copy of EAD</a>	NYAMITAVU, Immaculee			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	UKOYAGENYE, Jolie			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>
Core Services	<a href="#">Copy of EAD</a>	MWIBAGIZA, Mhitsemunda			8/30/2024	<a href="#">Add</a>	<a href="#">Add</a>

2. 'New Case task Attachment' tab opens under the 'Tasks' tab. Upload the file and enter description for the file.
3. Click 'Save.'

Pre Arrival | **Post Arrival** | RP Case Notes | Matching Grant | Other Programs

Client Data | Financial Tracking | R&P Reports | Case Forms | **Tasks** | Activities

### New Case task attachment

Task: Copy of EAD for AMANI, Sohail

Attachment: \*  PA-TS-2.1.docx

Description: Test

4. The attachment is then listed with information about the file.

Pre Arrival | **Post Arrival** | RP Case Notes | Matching Grant | Other Programs

Client Data | Financial Tracking | R&P Reports | Case Forms | **Tasks** | Activities

### Case Task Attachments

Task name: Copy of EAD for AMANI, Sohail

Attachment Type	Attached Date	Attached By	Status	Description / Comments	Remove
<a href="#">FileUpload</a>	6/24/2024		Added	PA-TS-2.1.docx. Test	<input type="checkbox"/>

## 6. Logging an Activity to Task

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

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

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

### Activities

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

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

Case Activity - Google Chrome

gr-rb-test.azurewebsites.net/Case/case\_detail.aspx?page=case\_activity\_add.aspx&CaseActivityID=8&CaseGuid=7778999d-254d-455e-9...

**Activity Type:** Email

**Activity date:** 4/1/2024 12:00

**Task:** Health Access Program (Test), ...

**Details:** This is a sample activity.

Save Cancel

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

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

## Activities

[Add Email](#)
[Add Phone Call](#)
[Add Message](#)
[Add Video Call](#)
[Add Mail](#)

Activity Date	Activity Type	Task Name	Details	Completed date	Due date	Notes
6/7/2024 1:02 PM	<a href="#">File Upload</a>		plus.png			<a href="#">Add</a>
6/7/2024 1:01 PM	<a href="#">File Upload</a>		down.png			<a href="#">Add</a>
6/7/2024 12:43 PM	File Request		I am sending this file request to collect copy of ... related to your case. Thank you!			<a href="#">Add</a>
6/7/2024 11:36 AM	<a href="#">Task</a>	member task for HARRIS, ALLISON	Task created			<a href="#">Add</a>
6/7/2024 11:36 AM	<a href="#">Task</a>	member task for CLARK, GEORGE	Task created			<a href="#">Add</a>
6/7/2024 11:36 AM	<a href="#">Task</a>	Intake task1	Task created		11/19/2021	<a href="#">Add</a>
6/7/2024 11:36 AM	<a href="#">Task</a>	Complete Initial Intake Assessment Form	Task created		11/22/2021	<a href="#">Add</a>

## 7. Case Forms and File Request functionality

This new functionality in IRIS allows affiliates to request additional files from the primary case member. Affiliates can now directly request necessary documents, such as identification or authorization forms, through the IRIS platform. This streamlines the process of gathering all required information, ensuring that case files are complete and up to date. This feature enhances communication and efficiency between affiliates and case members, making it easier to manage and track document requests and submissions.

1. On the 'Case Forms' tab, click on 'Request Files' button.
2. A new window will open under the same tab. Receiver's Email is auto populated from PA Email. Affiliates completes the default message with needed information.
3. Requested on and Requested by is auto populated.
4. Click on 'Send' button

Client Data	Financial Tracking	R&P Reports	Case Forms	Tasks	Activities
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### File Request

Receiver's Email: \*

Message:

Requested On: 6/24/2024

Requested By:

7.1 Email format (receiver’s view):

Below is the format of the email received by the member:

Dear User,  
You have received file request from IRIS Support on 6/7/2024 12:43 PM. Please click on below link to upload requested files. This link is valid next 24hrs only.

[File Request link](#)

Message:  
I am sending this file request to collect copy of ... related to your case. Thank you!

Regards,  
IRIS Support

- 1. The link redirects to File Request page. PA enters the case number, clicks ‘Submit’ that takes to the next window where requested files are uploaded. Once the files are uploaded, PA clicks the ‘Submit’ button.

File Request

\*\*\*Test\*\*\*

Enter Case Number

Submit

File Request

\*\*\*Test\*\*\*

Please upload files below and click Submit button.

Choose File No file chosen

You have uploaded these files:  
down.png  
plus.png

Submit

- 2. Attached files then get populated under the Case Forms tab.

Enrolled Programs

Pre ArrivalPost ArrivalRP Case NotesMatching GrantOther Programs

Client DataFinancial TrackingR&P ReportsCultural OrientationCase FormsTasksActivities

Case Forms

Request Files

Attachment Type	Attached Date	Attached By	Status	Description / Comments	Remove
FileRequest	6/7/2024	Member	Added	plus.png.	<input type="checkbox"/>
FileRequest	6/7/2024	Member	Added	down.png.	<input type="checkbox"/>

Remove Selected

Add Attachment

Select Attachment

Templates

Select Template