IRIS Onboarding Checklist

READY TO JOIN IRIS?

Ready to join community partners in utilizing IRIS to coordinate referrals? Complete the steps below to orient staff and onboard your organization:

☐ Consider workflow and client consent practices

Advance planning to integrate your organization's referral workflow with IRIS, including client consent, allows for a seamless transition for staff making and receiving referrals. Use the attached document, IRIS Workflow: A Guide for Organization, to support your planning. Be sure to review the IRIS Client Consent Considerations and Templates and discuss consent practices with your local IRIS Leadership Team to ensure your consent process aligns with IRIS.

☐ Provide training information to all relevant staff

While IRIS is simple to use, training helps users feel confident. Encourage all staff who will use the tool to watch the new user training.

https://connectwithiris.org/knowledgebase/iris-new-user-training/

☐ Familiarize staff with the IRIS Community Standards

Community partners developed shared expectations to guide the use of IRIS in your community. Your local IRIS Leadership Team will provide you with a copy of the standards and answer any questions. Be sure to review the standards with any staff that will make or receive referrals.

☐ Complete the IRIS New Organization Access Form

The IRIS Organization Access Form is used to build your organization's profile in IRIS, identify the individual at your organization with the authority to electronically sign the Responsible Data Use Agreement, and identify staff who should be granted IRIS access. When completed, submit this form to your local IRIS Leadership Team or e-mail it to the IRIS Support Team at **irisadmin@ku.edu.**

☐ Sign the Responsible Data Use Agreement

Once you have submitted your IRIS New Organization Access Form, the individual identified as the Responsible Data Use Contact will receive a link to sign the **IRIS Responsible Data Use Agreement** via email. When the agreement is signed, your organization will be live in IRIS and users can begin making and receiving referrals!

☐ Utilize Find Answers Page

The Find Answers page is home to several how-to articles as well as video tutorials for IRIS features. The section titled "**Preparing to Join IRIS**" contains links to documents that can assist you in your onboarding process.

https://connectwithiris.org/find-answers/