



IRIS Workflow

A Guide for Organizations

Clear expectations and a well-designed workflow will support IRIS use by staff in your organization. This tool and the accompanying IRIS Workflow: Organization Plan are designed to help you prepare others in your organization to confidently integrate IRIS into their daily responsibilities. Thank you for taking on this work!

Involve staff from across the organization in workflow planning discussions—front line staff, supervisors, leadership—to ensure all understand the vision and expectations. By thinking through these questions and completing the **IRIS Workflow: Organization Plan**, you will:

- Define which staff require IRIS access
- Plan how IRIS integrates into your organization's workflow, policies, and responsibilities
- Determine how client consent will be modified to reflect the use of IRIS

Begin by considering whether multiple programs within your organization will use IRIS. Utilize the Two Ways of Structuring Your IRIS Organization tool to determine whether programs within your organization should be represented as individual referral partners in IRIS. If they will, complete an **IRIS Workflow: Organization Plan** for each program.

Next, examine your organization's current referral workflow and consider which elements must be retained as you adopt IRIS as a referral mechanism. What are the opportunities to improve your organization's referral workflow as you transition to IRIS?

Incoming Referrals

- How are referrals received?
- What client details and information is provided with referrals? Do you currently receive all the information you need?
- Which staff receive and process incoming referrals?
- How are referrals assigned to staff for follow-up or next steps?
- What tracking or reporting is required for incoming referrals?

Outgoing Referrals

- Who makes referrals to other agencies?
- How do clients currently consent to a referral?
- What client details and information do you transmit with referrals?
- Who follows up on the outcome of outgoing referrals?
- What tracking or reporting is required for outgoing referrals?

After considering the questions above you are ready to describe your organization's approach on the **IRIS Workflow: Organization Plan**. This template makes it simple to communicate expectations and prepare staff to begin using IRIS.