



IRIS Workflow

Organization Plan

Organization Name:

Program Name (if applicable):

Date:

STAFF RESPONSIBILITIES

Staff members can fulfill more than one of the roles described below.

IRIS Organization Representation

Individual(s) who represent the organization at IRIS Community Conversations:

Primary IRIS Contact

Individual responsible for requesting and approving IRIS access for organization staff. This individual's name and contact information are viewable to partner organizations in IRIS. It should be a person who can answer questions about services offered, eligibility, and the use of IRIS within the organization: _____

IRIS Users

List the names of staff who will be granted IRIS access and their role in the referral workflow. (Review *IRIS Workflow: Email Notifications* to consider how IRIS email notification preferences can be configured to support each user's role in the workflow.)

Staff processing incoming referrals: _____

Staff sending outgoing referrals: _____

Staff responsible for updating the Capacity Bar: _____

Staff responsible for updating the Organization Profile as needed: _____

Other staff with IRIS access, may include supervisors, etc. (list responsibility):

Accountability Champion

Individual responsible for reviewing data to ensure workflow is being followed, identify concerns and opportunities with data, and ensure that appropriate staff have access: _____

Trainer

Individuals responsible for ensuring all staff understand the organization's referral workflow and receive IRIS training: _____

Other staff

Include the names and roles of staff who are involved in the referral workflow but won't have access to IRIS:

_____	_____
_____	_____

CLIENT CONSENT

Review (name of documents here)

Obtaining Consent

Describe expectations, documents, and workflow for obtaining consent for referrals

Declined Consent

Describe expected actions if a client declines to have a referral made through IRIS.

TRAINING

Organization Workflow Training

Describe how staff will be trained your organization's IRIS workflow and Community Standards.

IRIS Training

Describe the process for ensuring all staff view an IRIS training webinar.

COMMUNICATION PLAN

Workflow Plan Storage and Schedule

Describe where the workflow plan will be saved, who will have access, and the schedule for updating the workflow plan and communicating changes to staff.

QUALITY AND ACCOUNTABILITY

Data Review

Describe the schedule for reviewing referral data to support timely follow-up to incoming referrals, communication with partners about any unprocessed outgoing referrals, and other opportunities to improve referral coordination.