



IRIS Organization Workflow and Practices Worksheet

IRIS Organization Name:

Date:

STAFF RESPONSIBILITIES

Provide the names of individuals who will fulfill the following roles. 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 who manages IRIS access for organization staff and serves as the main point of contact for partners. The Primary Contact should:

- Maintain an active IRIS account and approve/deactivate users as needed.
- Keep the Capacity Bar and Organization Profile accurate and up to date.
- Support staff with workflow and Community Standards questions.
- Be a knowledgeable resource for program and referral inquiries.
- Have their name, phone, and email visible to all IRIS users.

Primary IRIS Contact:

IRIS Users

List the names of staff who will be granted IRIS access and their role in the referral workflow.

Staff processing incoming referrals:

Staff sending outgoing referrals:

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:

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 *IRIS Consent Guide* and *IRIS Verbal Consent Considerations*

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 on your organization's IRIS workflow and IRIS Community Standards.

IRIS Training

Describe the process for ensuring all staff view an IRIS New User Training.

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.