Onboarding Checklist

For Partner Organizations

Before your onboarding to IRIS is complete, Primary Contact is responsible for completing the following steps, engaging other staff members when noted.

ONBOARDING STEPS

☐ 1- All users review & acknowledge Community Standards

Your referral partners developed shared expectations to guide the use of IRIS in your community. Your IRIS Local Leadership Team will provide you with a copy of the standards for you to read, understand and adhere to upon gaining IRIS access. Be sure to review the standards with any staff that will make or receive referrals. Depending on your IRIS Community, the Primary Contact may be asked to sign and acknowledge the Community Standards as an extra layer of accountability.

☐ 2 - Your organization establishes workflow & client consent practices

Advanced planning is essential for a seamless transition to IRIS for your organization. The attached document, **IRIS Organization Workflow Guide**, will support your planning by walking you through several workflow considerations.

If your organization already has a consent protocol in place, you may borrow language from the **IRIS Consent Template** to incorporate into your existing consent form. It is required that clients be informed your organization will be using IRIS to make a referral on their behalf. If you have additional questions or curiosities, see **IRIS Consent Guide** and be sure to talk to your IRIS Local Leadership Team.

☐ 3 - Ensure all relevant staff are trained

While IRIS is simple to use, proper training for all users is necessary for successful integration of the system. Training requirements vary depending on the IRIS Community; be sure to check with your IRIS Local Leadership Team to understand what is expected of your organization. A minimal requirement for all users is to watch the **IRIS New User Training Video**.

☐ 4 - Submit the IRIS Organization Access Form

You will need to complete the Organization Access From for your System Manager(s) to add your organization to IRIS, as it contains all the information necessary for a complete profile. Your Local Leadership Team will either send you a PDF or an online link to fill out.

Please note that if Primary Contacts and/or Responsible Data Use Contacts require user access, their contact details must also be listed in the user access request section of the Organization Access Form.

☐ 5 - RDU Contact signs the Responsible Data Use Agreement

Once your local leaders add your organization to IRIS, the person you designated as your Responsible Data Use (**RDU**) Contact will receive an email from **irisadmin@ku.edu*** with an invitation to sign the **RDU Agreement**. Only once this agreement is signed can your organization become active in IRIS and be available for referrals

☐ 6 - All users sign the User Confidentiality & Data Security Agreement

Once the RDU Agreement is signed, all users will receive an email from **irisadmin@ku.edu** with an invitation to sign the User Confidentiality & Data Security Agreement. Signing this agreement will activate the user's account.

☐ 7 - Complete your organization's profile in IRIS

Once an organization is active in IRIS, Primary Contacts should log in, update the capacity bar, select Service Areas, select the organization's Sector(s), upload logo, and add/edit details in the organization's profile.

☐ 8 - All users complete team member profiles in IRIS

After receiving access to IRIS, users should log in, add phone number, and set email notification preferences.

Please note that the IRIS Admin email may be automatically blocked by some organizations. If you are not receiving the emails described in this document and have checked your spam/junk folders, please reach out to your IT department. Please refer to the **Preparing to Receive IRIS Emails workflow guide.*