IRIS Organization Workflow Guide

Clear expectations and a well-designed workflow will support IRIS use by staff in your organization. This tool is designed to help you prepare others in your organization to confidently integrate IRIS into their daily responsibilities.

WORKFLOW PLANNING

As you begin your onboarding into IRIS, involve staff from across the organization in workflow discussions—front line staff, supervisors, leadership—to ensure all understand the vision and expectations. By thinking through these questions and completing the **IRIS Organization Workflow and Practices Worksheet**, 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.

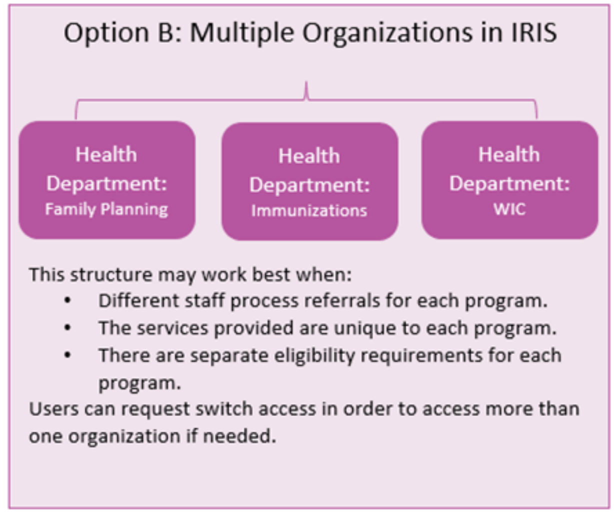
After working through this guide, you will be ready to describe your organization's approach in the *IRIS Organization Workflow and Practices Worksheet*. This template makes it simple to communicate expectations and prepare staff to begin using IRIS.

STRUCTURING YOUR ORGANIZATION

As you have these conversations, consider whether multiple programs within your organization will use IRIS. Organizations with multiple programs and/or services may choose to structure their IRIS Organization as either a single organization or multiple individual organizations. If you opt to separate your organization into different referring entities, each program should complete an *IRIS Organization Workflow and Practices Worksheet.*

Review the example below and consider which structure will best serve your workflow needs.

This example illustrates the options for a health department that will make and receive referrals through IRIS for their Family Planning, Immunization, and WIC programs.



REFERRAL WORKFLOWS

After you have determined the structure of your IRIS Organization, 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 are 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?

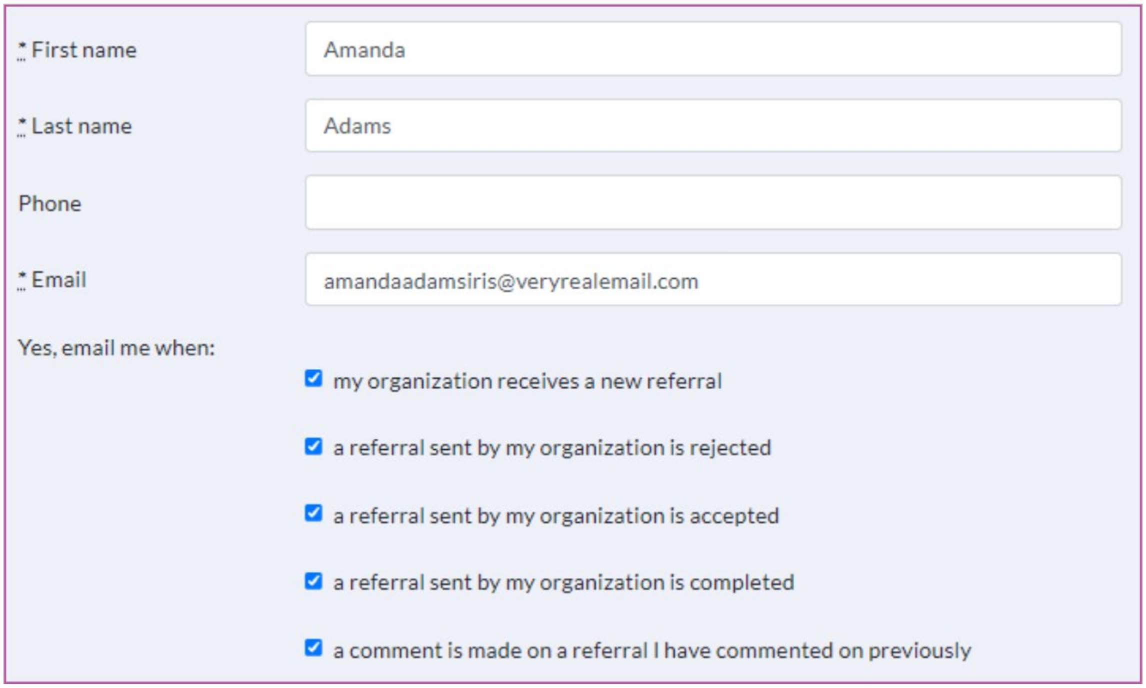
Outgoing Referrals

- 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?

USER EMAIL PREFERENCES

Lastly, you will also need to ensure all users assigned to your organization establish their email notification preferences. To facilitate email notification delivery, all users should add irisadmin@ku.edu to their email's safe sender list to prevent email notifications from being blocked by spam filters.

Email notification settings are found on the **My Profile** tab located on the left navigation menu in IRIS.



Designed to support IRIS integration into every user and organization's referral workflow, IRIS email notifications provide users real-time alerts about new referrals and changes to referral status. The system will automatically check all notification boxes, so users should review their workflows and ensure they will receive the correct email notifications based on their preferences and role in the IRIS workflow.

For example, staff responsible for processing incoming referrals may opt out of all email notifications related to referral status changes. Similarly, staff who primarily track and monitor outgoing referrals may opt out of email notifications when their organization receives a new referral. **However, when considering email notification preferences, note that at least one user from each organization *must* opt to receive new referral email notifications.**