



Communicating with Your Community about IRIS

This guide is intended to assist Community Champions and Managers with e-mail communication to potential organizations, IRIS organization points of contact, and all IRIS users during implementation and beyond. You will find sample language for emails that can be tailored to meet the needs of your community as well as a general timeline for communication.

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Note: The title of each email provided below can also be used as the subject line of your email.

Planting Seeds

What is IRIS?

Good morning, **{Point of Contact}**!

Our organization is leading implementation of the Integrated Referral and Intake System (IRIS) in our community. IRIS is a web-based community referral system that helps organizations connect the families they serve to the right resources in their community. You can learn more about IRIS by watching this 5-minute video here: <http://connectwithiris.org/what-is-iris/>.

We are excited to utilize a tool that will support our efforts to connect more families to the services they need and hope that your organization will join us! I will follow-up with you by phone in the coming week but please don't hesitate to reach out to me with questions before then.

Thank you!



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{Community Champion}

To be sent to potential partners to initiate a conversation about IRIS, if needed.

Strong Roots

Is IRIS Right for My Organization?

Good morning, {Primary Contact}!

As your organization begins to discuss adopting a tool like IRIS, it may be helpful to consider staff enthusiasm and flexibility around changes in your referral process. The attached document was created as a way for organizations to assess their readiness to adapt workflow and procedures in preparation for joining IRIS.

As you talk through these questions with your organization, don't hesitate to reach out with any questions that you might have.

Thank you!
{Community Champion}

Attach: Is IRIS Right for My Organization?

To be sent when the organizations begin their discussions around potentially adopting IRIS.

IRIS Implementation Survey

Good morning, {Primary Contacts}!

As we begin the process of implementing the Integrated Referral and Intake System (IRIS), we request your participation in a brief network survey to better understand your current referral processes and expectations for IRIS. The information you provide will support the development of a shared vision for IRIS in our community as well as help to guide the implementation process.

We expect this survey will take you about 10 minutes to complete. Please complete this survey no later than {Deadline Date} by clicking the link [here](#).

Thank you in advance for your time and responses!

{Community Champion}

To be sent in advance of community collaboration, if needed.

IRIS Blooms



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IRIS Workflow – A Guide for Organizations

Good morning, {Primary Contact}!

I have attached the IRIS Workflow: A Guide for Organizations to assist you and your staff as you determine how to best integrate IRIS into your referral workflow.

Thank you!
{Community Manager}

Attach: IRIS Workflow: A Guide for Organizations

To be sent when discussing workflow and integration, if not included during community conversations.

Organization Access to IRIS

Good morning, {Primary Contact}!

Please, complete the attached IRIS Organization Access Form. It will be used to create your organization's initial profile in IRIS. On this form you will provide information about your program, identify a Responsible Data Use Contact, and collect the names of organization staff who should be granted IRIS access. The completed form should be emailed to {Community Manager's email} by {due date}.

Once the IRIS Organization Access Form is submitted, the individual identified as your organization's Responsible Data Use Contact will receive a link to the IRIS Responsible Data Use Agreement via email and needs to electronically sign the document. An example of this document is attached so you may determine the appropriate person at your organization to be responsible for signing this agreement.

Staff who will have IRIS access are encouraged to watch the new user training here:
<https://connectwithiris.org/knowledgebase/iris-new-user-training/>.

Thank you!
{Community Manager}

Attach: IRIS Organization Access Form

To be sent when the organization is ready to participate in IRIS.

IRIS Implementation Survey Follow-Up

Good morning, {Primary Contact}!



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My records show that **{Organization Name}** has not completed an IRIS Implementation Survey. As time allows, please have a member of your staff complete the survey before the end of the day on **{due date}**. This survey will only take approximately 10-15 minutes and can be found at the link [here](#).

Thank you!
{Community Manager}

To be sent one week prior to launch if the survey has not been completed.

Follow-Up: Organization Access to IRIS

Good morning, **{Primary Contact}**!

We have not yet received your IRIS Organization Access Form. If **{Organization Name}** still plans to participate in the launch of **{IRIS Community}** on **{launch date}**, please complete and submit the attached form to **{Community Manager's email}** before the end of business on **{due date}**. If you do not have your forms completed by this time, you will still be able to join your IRIS Community after launch.

Please let me know if you have any questions!
Thank you!
{Community Manager}

To be sent one week prior to launch if the form has not been received.

One Week to Launch of IRIS!

{Community Name} users,

As we approach the launch of our IRIS community on **{launch date}** we want to give you an idea of what to expect.

If you have sent your IRIS Organization Access Form (see attached) to **{Community Manager's email}**, the individual you designated as Responsible Data Use Contact should have received an e-mail titled "IRIS Data Use Agreement" from irisadmin@ku.edu. The e-mail includes a link to the IRIS Responsible Data Use Agreement. Your organization will not be active in IRIS until your Data Use Contact clicks the link, reads the agreement, and digitally signs their name.

When the community is launched on **{launch date}**, the system will generate a message to the e-mail address provided for each user. The subject line will read "Invitation instructions" and will also come from irisadmin@ku.edu. After clicking the "Accept invitation" link, a new window will appear, prompting the new user to set their password. After that step, their IRIS account will be active! Once their account



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is active, they should log in and set their email notification preferences. When they log in to IRIS, select 'My Profile' on the left navigation menu, and select the instances you would like to receive notifications.

If you have any questions before then, just let me know.

Thank you!
{Community Manager}

Attach: IRIS Organization Access Form

To be sent to all users one week prior to launch.

IRIS has Launched! Login to Finish Your Organization Profile.

Welcome to IRIS!

All users in your organization should now have access to your IRIS Community. If anyone did not receive an email including their user login information, please contact {Community Manager} at {Community Manager's email}.

Don't forget to complete your organization's profile by clicking "My Organization" on the left navigation bar in IRIS. You may confirm your current profile information, upload your logo, and choose Service Areas that accurately describe the services provided by your organization. Service Areas allow your community partners to easily and accurately identify your organization for referrals.

Also, remember to create a capacity status by clicking on the "Capacity Bar" in the top right corner of the IRIS "My Home" page. This will inform your community partners of your current capacity to accept referrals.

You are now ready to use IRIS! If you have further technical questions about the application, contact IRIS Support at irisadmin@ku.edu.

Thank you!
{Community Manager}

To be sent to all users on launch day

Attention Needed: IRIS Responsible Data Use Agreement

Good morning, {Responsible Data Use Contact}!

It appears you have not yet signed the IRIS Responsible Data Use Agreement for {Organization Name}. Please check your Inbox and Junk Email folders for an email from irisadmin@ku.edu. You will need to



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follow the link included in the email to electronically sign the Responsible Data Use Agreement. Please let me know if you did not receive the email or have any issues accessing the links.

Thank you!
{Community Manager}

To be sent if the agreement was not signed when initially generated.

Cultivate

Available IRIS Resources

You have now been an IRIS user for one week! I wanted to take this opportunity to follow up about some of the resources available to guide your use of IRIS.

Be sure to read your Community Standards! This is the shared expectations of use, customized by our community for the purpose of creating a cohesive referral network and improving communication. The Community Standards can be found in the Community Documents section of IRIS on the left navigation menu.

If you have immediate technical questions about the application you will find several articles and tutorial videos at <http://connectwithiris.org/find-answers/> or by clicking “Help” at the bottom of the left navigation menu in IRIS.

Please, contact me with any questions as you begin to use the system.

Thank you!
{Community Manager}

Post Launch Email - To be sent one week after launch

Ongoing Use

Attention Needed: IRIS Downtime

{Name of IRIS Community} IRIS users,

This email is to inform you that IRIS will be unavailable {timeframe} while we update our Referral Information Fields. During this timeframe you will be unable to make or receive referrals.

If you have any questions, please let me know.

Thank you!
{Community Manager}



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To be sent whenever IRIS is unavailable due to updates.

New IRIS Referral Partner!

{Name of IRIS Community} IRIS users,

Please welcome {Name of New Partner} to our IRIS community! To learn more about your new IRIS referral partner, find their profile under "Partner Organizations" on the left navigation menu. Your new partner is now available to send and receive referrals!

Thank you!

{Community Manager}

To be sent when a new organization is added to your community.

Welcome to IRIS!

You now have user access in IRIS! If you did not receive an email with the subject line "Invitation instructions" from irisadmin@ku.edu, please check your Junk Email folder to assure the email has not been routed there.

There are several resources available to guide your use of IRIS. We recommend that all users watch the IRIS New User Training at <https://connectwithiris.org/knowledgebase/iris-new-user-training/>. If you have immediate technical questions about the application you will find several articles and tutorial videos at <http://connectwithiris.org/find-answers/> or by clicking "Help" at the bottom of the left navigation menu in IRIS.

Once you have logged into the IRIS community, be sure to read our Community Standards. This is the shared expectations of use, customized by our community for the purpose of creating a cohesive referral network and improving communication. The Community Standards can be found in the Community Documents section of IRIS on the left navigation menu.

Don't forget to complete your organization's profile by clicking "My Organization" on the left navigation bar in IRIS. You may confirm your current profile information, upload your logo, and choose Service Areas that accurately describe the services provided by your organization. Service Areas allow your community partners to easily and accurately identify your organization for referrals.

Also, remember to create a capacity status by clicking on the "Capacity Bar" in the top right corner of the IRIS "My Home" page. This will inform your community partners of your current capacity to accept referrals.



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You are now ready to use IRIS! Feel free to contact the Community Manager at [{Community Manager email}](#) with any additional questions.

Thank you!
[{Community Manager}](#)

To be sent when a new user receives access to their account.