

# Loan Consent Functionality in IRIS

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## 1. Overview

Loan Consent functionality in IRIS allows RAs and Affiliates to assist refugee individual in completing travel loans consent letter so that our Loans team can follow up with refugee household on travel loans re-payment plan.

To complete Loan Consent form for an Individual, below conditions must be fulfilled:

- ✓ Individual must be an Adult i.e., 18+ years old.
- ✓ Case has arrived in United States and Arrival Date is updated in IRIS.
- ✓ Address and Contact information is update for individual under Client Data of Post Arrival section of IRIS Case.

## 2. Loan Consent Notifications in IRIS

For a refugee case in IRIS, Loan Consent is required for all Adult (i.e., age 18+) individuals on Case who have arrived in United States. All RAs and Affiliates can view pending Loan Consents in IRIS Dashboard under **R&P Period Reports** section. Numbers at end of Loan Consents Due notification indicates number of Individuals who are 18+ and arrived in United States but their Loan Consent form is not completed.

Pre-Case Processing	Notifications	
<a href="#">Advanced Search</a> <a href="#">Add AOR</a> <a href="#">Add Interest File</a>	<b>Pre-Case Processing</b> AORs Submitted to RPC/RSC NEW AOR Pre-Case Notes NEW Interest Pre-Case Notes Minor Aging/Aged Out AORs Accepted by RA	<b>R&amp;P Period Reports</b> <a href="#">R&amp;P Period Reports Due (22)</a> <a href="#">R&amp;P Period Reports OverDue (4)</a> <a href="#">R&amp;P Period Reports Corrections Needed (1)</a> <a href="#">Loan Consents Due (440)</a>
Case Management		
<a href="#">Advanced Search</a> <a href="#">Add Non-Refugee Case</a> <a href="#">Case Return</a>		

When a user clicks Loan Consents Due notification, they can view list of all the individuals which have pending Loan Consent. Users can click Name of Individual which will take them to actual Loan Consent form of individual. Below is some information about details you see on notifications.

- **Arrival Date:** Date at which refugee case arrived in United States.
- **Due Date:** Date at which Loan Consent is due for individual i.e., 90<sup>th</sup> day from Arrival Date.

- **Days Remaining:** Number of days in which Loan Consent will be due.
- **Days Overdue:** Number of days after Due Date since Loan Consent was not completed.

There are 440 Loan Consents Due or Overdue.

<a href="#">Case Number</a>	<a href="#">Individual</a>	<a href="#">Arrival Date</a>	<a href="#">Due Date</a>	Days Remaining	Days Overdue	<a href="#">Affiliate</a>
AF-205171	<a href="#">BELL, DAVID</a>	8/1/2022	9/14/2021		519	DC/MD/VA-Fairfax
TU-00411664	<a href="#">MURPHY, JEFFERY</a>	4/14/2022	7/12/2022		218	DC/MD/VA-Fairfax

### 3. Completing Loan Consent in IRIS

Loan Consent form is located under “**Post Arrival**” tab of refugee case in IRIS. Under **Post Arrival > Loan Consent** tab, IRIS users will see list of all Individuals who are eligible for Loan Consent and their status.

All individuals with **Pending** Loan Consent status are required to be **Submitted** and additionally, users have option to make an **Update** to Loan Consent which was submitted previously.

**Note:** Please ensure Individual Address and Contact information is updated in IRIS before proceeding with Loan Consent.

Pre Arrival	Post Arrival	RP Case Notes	Matching Grant	Other Programs
Client Data	Financial Tracking	R&P Reports	Cultural Orientation	Case Forms
				Loan Consent

#### Loan Consent

90<sup>th</sup> Day: 9/11/2022

Individual	Opted In	Response Date	Status
WILSON, JAMIE	False	2/13/2023	<a href="#">Submitted</a>
ALLEN, DELORES			<a href="#">Pending</a>
HUNTER, RENEE			<a href="#">Pending</a>

To complete Loan Consent form in IRIS, please download loan consent form template under **Post Arrival > Case Forms** tab. In **Case Forms**, select “**Travel Loans Consent Letter**” in Templates and click **Download**.

Pre Arrival	Post Arrival	RP Case Notes	Other Programs
Client Data	Financial Tracking	R&P Reports	Cultural Orientation
			Case Forms

#### Case Forms

<a href="#">Attachment Type</a>	<a href="#">Attached Date</a>	Attached By	Status	Description / Comments	Remove
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Remove Selected

Add Attachment  **Templates**  [Download](#)

Please follow below steps in IRIS once loan consent letter is filled and signed by refugee individual.

- 1) Under **Loan Consent** tab, click on **Pending** status to open Loan Consent form for individual.
- 2) In loan consent form on next page, please verify address and contact information of individual is correct and check **"I confirm individual contact information is valid"**.
- 3) Next, select **Offline** as mode to submit Loan Consent and click **Choose File** to upload consent letter.
- 4) Affiliate can select **Do you Opt-In? Yes/No** depending upon response from refugee individual and enter **Consent Completion Date** as date at which offline Loan Consent form was completed.
- 5) Click **Submit** button to save consent letter in IRIS.
- 6) Uploaded copy of consent letter can be accessed under **Tracking History** as attachment.

## Loan Consent

**Alien Number:** 548177329

**Individual:** ALLEN, DELORES

**Due Date:** 9/11/2022

**Status:** Submitted

Address	City	State	Zip	Home Phone	Work Phone	Mobile	Email Address
501 Test	Baltimore	AL	12012	508-239-0123			stripathi@lirs.org

☒ I confirm individual contact information is valid \*

Please complete Loan Consent offline form and upload it here:

Do you Opt-In? \*

☒ Yes ☐ No

Consent Completion Date: \*

2/16/2023

Update

Cancel

Choose File No file chosen

[Travel Loans Consent Letter \(1\).pdf](#)

Upload Consent Letter  
after completion

Attachments

### Tracking History:

Date	Opt-In?	Completion Date	Changed By	Document Link
2/17/2023	True	2/16/2023	Shiva Tripathi	<a href="#">Travel Loans Consent Letter (1).pdf</a>

## 4. Additional Information

### 4.1. Updating Contact Information IRIS

In IRIS, Address and Contact information for each individual can be updated under **Post Arrival > Client Data** tab of IRIS Case. Please follow below steps to add/update Individual Address and Contact information:

- 1) In **Client Data** tab, click **Add** button under US Address.
- 2) In new pop-up window, enter Individual Address and Contact information (refer to screenshot below).
- 3) Click **Save** button after all information is entered.
- 4) IRIS users can also remove/modify existing Address and Contact information from this page.

Pre Arrival	Post Arrival	RP Case Notes	Matching Grant	Other Programs	
Client Data	Financial Tracking	R&P Reports	Cultural Orientation	Case Forms	Loan Consent

## Case Members

Alien ID	Seq.	Name	Relation to PA	SSN	Gender	Birth Date	Minor
<a href="#">487750608</a>	1	WILSON, JAMIE	Principal Applicant		M	1/1/1972	

## US Address

Alien ID	Seq.	Name	Address	City	State	Zip Code	County	Action
<a href="#">487750608</a>	1	WILSON, JAMIE	<a href="#">501 Test</a>	Baltimore	AR	12012	Benton	<a href="#">Add</a> <a href="#">Print</a>

### US Address

Address: \*

501 Test

City: \*

Baltimore

Zip Code: \*

12012

State: \*

Arkansas

County: \*

Benton

☐ Copy same address as PA for other case member(s)

### Contact Information

Home Phone:

508-239-0575

Work Phone:

Cell Phone:

Email Address:

stripathi@lirs.org

Save

Remove

Cancel

Fields marked by an asterisk (\*) are required.

## 4.2. Creating a Gmail Account

To sign up for Gmail, create a Google Account. You can use the username and password to sign-in to Gmail. Please follow below steps to create Gmail account.

- 1) Go to the [Google Account creation page](#).
- 2) Follow the steps on the screen to set up your account.
- 3) Use the account you created to [Sign-In](#) to Gmail.