



MANUAL



Local Offices





Manual for Local Offices

WelcomeWorks, formerly called the Refugee Welcome Collective (RWC) App, provides a user-friendly tool for resettlement agency sponsors, volunteers, and staff to track and document service delivery and activities, including core services delivered, volunteer hours provided, financial contributions, in-kind donations, mileage provided, use of interpretation, and case notes. Additionally, it helps organizations collect and track data showing the contributions and impact of community sponsorship and volunteer programs. This manual is designed to be used by the local office users.

WelcomeWorks is funded by the Bureau of Population, Refugees, and Migration (PRM) and meets the Department of State refugee data security requirements.

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WelcomeWorks is a product of Church World Service's Refugee Welcome Collective under an agreement paid for by the U.S. Department of State.

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This guide provides step-by-step instructions on how to set up users within WelcomeWorks and gives an overview of the tool's key functions and security information.

How to Use WelcomeWorks:

1. The national resettlement agency (RA) sets up an account for the local office and assigns the local office user to the account. An invitation is sent to the local officer user provisioned to use the tool.
2. A local office user accepts the invitation to use WelcomeWorks.
3. A local office user selects from the list of the available Reception and Placement (R&P) core service list and wrap-around services they want their volunteers or sponsors to complete as part of their welcoming activities. These core services and wrap-around services can be changed or edited at any time.
4. A local office user enters client information for clients/cases they would like to match with a volunteer, co-sponsor, or support team.
5. A local office user enters information about the volunteer, and sponsors (support team or co-sponsor) they would like to match with the client/case.
6. When a volunteer or sponsor's information is entered into WelcomeWorks, the volunteer or sponsor will be sent an email to set up a profile.

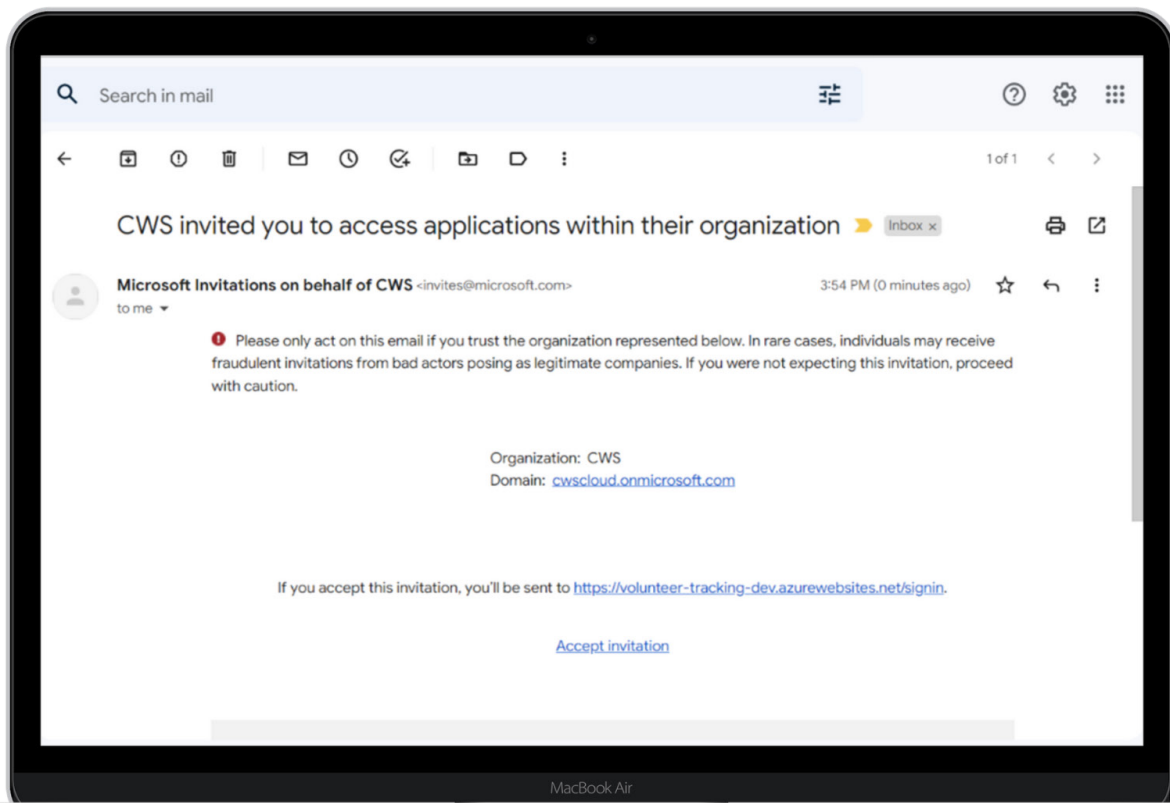
Note: some browsers activate the pop-up blocker (a pop-up usually contains a sign-up/contact form, a button, or a link), so be sure to turn off pop-up blockers before setting up a profile.

7. When a volunteer or sponsor sets up a profile, they have access to the R&P core service list and wrap-around services to complete and the timeline by which to complete them. They are also guided on how to provide case notes, record the core services and wrap-around services provided, including when they were completed, the time the activities took, transport or interpretation that may have been provided, and a place to document information about the activity.
8. A local office user can view the progress of their volunteers and sponsors.
9. Sponsors can view the progress of their group.
10. Reports are available for local and national office users to provide full and comprehensive information about the impact of their volunteer and sponsorship programs.



Joining WelcomeWorks

You should have received an email invitation to join WelcomeWorks after your National Office User created your Local Office or added you as a Local Office User.



Click **Accept invitation** and follow the instructions provided in the invitation email, or when prompted after logging into WelcomeWorks.

When prompted, enter your sign-in credentials: email and password. You may be asked to provide a verification code sent to your email. Read the permissions requested by CWS and click **Accept**.

The CWS Terms of Use (WelcomeWorks End User Licensing Agreement) will pop-up. Click **Accept** to confirm.

TIP: make sure pop-up blockers are turned off when accessing WelcomeWorks.org.



Selecting the Reception and Placement (R&P) track

After you accept and sign in, the first step is to click on the “gear-like” icon (see arrow below) at the top of your screen to select the Reception and Placement track. Your page view will look like the image below:

The screenshot shows the top navigation bar with tabs for 'Refugee Welcome Collective', 'Volunteers', 'Clients', 'Sponsorship Groups', 'Reports', and a gear icon for settings. Below the navigation bar, there are two text boxes: 'Please select Welcome Corps or Reception and Placement Activities' and 'Please deselect the activities you do not want listed for volunteers'. Under the first text box, there are two radio buttons: 'Reception and Placement' (selected) and 'Welcome Corps'. Below the second text box, there are four sections: 'Pre-Arrival' (with four checked items: 'Secured decent, safe, and sanitary housing', 'Provided furniture and household items', 'Shared relevant health information with healthcare providers (APA)', and 'Prepared and made arrangements for client(s) with special needs, if applicable (APA)'), 'Arrival', 'Service', and 'Additional wrap-around services'. At the bottom, there are 'Cancel' and 'Save' buttons, and a gear icon.

The next step is to select the **Reception and Placement** track. Proceed to check/uncheck the core services and wrap-around services that your local office provides to the clients. After you have selected the R&P track and your local office's core services and wrap-around service, click **Save** at the bottom of your screen to activate your selection. After you have clicked save, your user window has been activated for the Reception and Placement activities.

Notice the tabs at the top of the page:



Volunteers



Reports



Clients



Settings



Sponsorship Groups

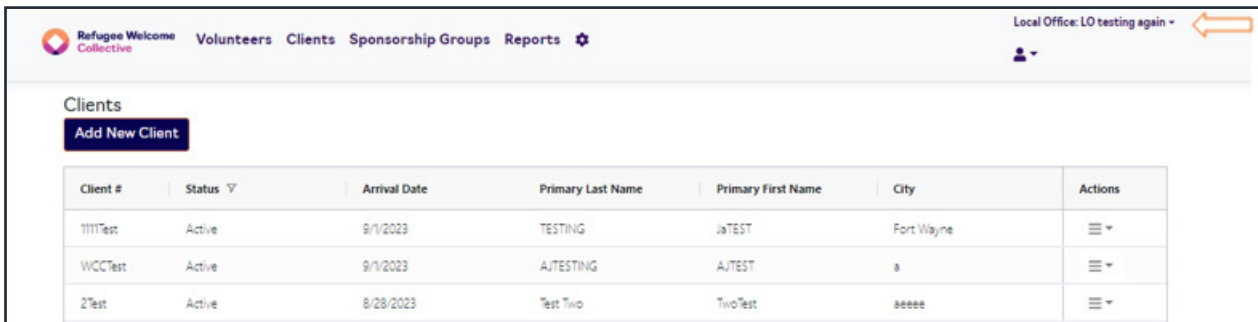


One email for multiple roles

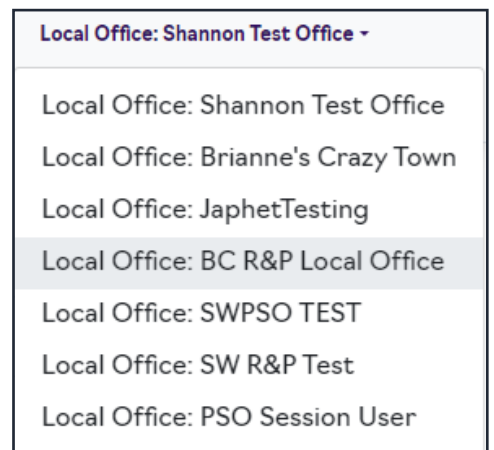
If you have multiple roles in WelcomeWorks that are associated with your email address, you can access all roles without logging out of your account. This is a new update that ensures that users can now select any role they want to access by simply choosing the role in their dashboard.

For example, if your email address is provisioned as a national office user, a local office user or multiple local office accounts, and/or a volunteer in the R&P and this same email is provisioned as a Private Sponsor Organization (PSO) user and/or a Private Sponsor Group (PSG) in the Welcome Corps, you can access all these roles without logging out to access each role. Please note that if you have different roles with different email addresses, this does not apply to you. Only users who have *one email address associated with different roles* will be able to use this update.

To switch between different roles, first sign in to your WelcomeWorks Account.



On the top right corner of your screen, you will see a drop-down (see arrow above). Click the drop-down to choose the role you want to access.





Now, create a new refugee client profile.

Step 1

Start by clicking **Clients** tab and then the **Add New Client** button.

Refugee Welcome Collective | Volunteers | Clients | Sponsorship Groups | Reports

1 Client Information | 2 Client Address | 3 Volunteer Information | 4 Review

Case Number: 123 | Case Size: 1

Client Date of Arrival at final destination: 10/09/2023 | Client Country of Origin: Ethiopia

Client Native Language: Swahili | Other Languages Spoken: Afar, Amharic, Arabic, Belarusian

Grant Tag: R&P

Does the client have a U.S. Tie? Yes No

Next

Step 2

You are now on tab #1: **Client Information**. Note that each tab you are on will be colored orange to show that you are active on the tab.

Please enter the **Case Number**, **Case Size**, **Client Date of Arrival**, **Client Country of Origin**, and **Client Native Language**.

You can add **Additional Language Spoken**, if applicable. You can also indicate if a client has a U.S. Tie. If yes, you can add the **U.S. Tie Name**, **Phone Number**, and **Language Spoken**.

After entering this information, click **Next**.



Step 3

You are now on tab #2: **Client Address**.

Enter **Primary Applicant Name**, **Address**, and **Contact Phone Number**.

The screenshot shows a web application interface for 'Refugee Welcome Collective'. The navigation bar includes 'Volunteers', 'Clients', 'Sponsorship Groups', and 'Reports'. The main content area has four tabs: '1 Client Information', '2 Client Address' (highlighted), '3 Volunteer Information', and '4 Review'. The 'Client Address' form includes the following fields:

- Primary Applicant Name:** Three input fields containing 'Test Client', 'Middle name', and 'Test Client'.
- Address:** Two input fields for 'ABC Street' and 'Address Line 2'.
- City/State/Zip:** Three input fields containing 'ACA', 'Iowa', and '11111'.
- Contact Number:** One input field containing '(123) 456-7890'.
- Additional Family Members:** A section with an 'Add Family Member' button.
- Navigation:** 'Previous' and 'Next' buttons at the bottom.

Then, add family members for refugee client cases of more than one. Add as many family members as applicable for the client family.

Click **Next**.



Step 4

You are now on tab #3: **Volunteer Information**.

The screenshot shows a multi-step form with four tabs: 1 Client Information, 2 Client Address, 3 Volunteer Information (active), and 4 Review. Under the active tab, there are two input fields: 'National Resettlement Agency' with the value 'Church World Service (CWS)' and 'Name of local affiliate office' with the value 'LO testing again'. Below these fields is a question: 'Are you matching this client with a community sponsorship group or volunteer now?' with two radio button options: 'Yes' and 'No'. At the bottom of the form are two buttons: 'Previous' and 'Next'.

The **National Resettlement Agency** and the **Name of Local Affiliate Office** will be auto-filled. The reason is that as a local office (user), you were created in WelcomeWorks by your national office (user) who provided the name of your national resettlement agency and local affiliate office.

To pair/match a refugee client with a community sponsor group or individual volunteer in WelcomeWorks, click **Yes** to the question: "Are you matching this client with a community sponsorship group or volunteer now?"

Then, select your desired action – **Community Sponsorship Group** or **Individual Volunteer** – under the question: "Are you matching them with a community sponsorship group or a volunteer?"



Create and Match New Client

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If you are pairing the client with an individual volunteer, complete all the required information in the image below:

Are you matching them with a community sponsorship group or a volunteer?

Community Sponsorship Group
 Individual Volunteer

Individual Matched with this client: 123
Individual performing welcoming activities that promote client integration

Email Address
Email Address ⓘ
Required field.

Cell Phone
Cell phone

First Name
First name ⓘ
Required field.

Date of Match
mm/dd/yyyy

Last Name
Last name ⓘ
Required field.

Time Commitment (Months)
Time commitment

How many core services is the volunteer responsible for delivering?
Number of core services ⓘ
Must be 0 or more.

What is the volunteer's required cash contribution?
Min. ⓘ N/A
Must be 1 or more.

What is the volunteer's required in-kind contribution?
 Describe below N/A

Please describe the activities (wrap around services) the volunteer is responsible for.
Describe activities

Has the volunteer received training?
 Yes
 No
Note: All volunteers that interact directly with clients should receive training. If you need help accessing training or would like to request a training, please contact the Refugee Welcome Collective.

Has the volunteer provided background checks?
 Yes
 No
Note: All volunteers that interact directly with clients need to complete a background check. If you need assistance on volunteer background checks, please contact the Refugee Welcome Collective.

Additional Volunteers

Additional volunteers are individuals who perform welcoming activities that promote client integration which are not associated with a community sponsorship group.

If you are pairing the client with a community sponsorship group, select **Community Sponsorship Group**.



The next question is: “Which type of community sponsorship group is the match?” Select either **Co-sponsor** or **Support Team**, whichever applies to your application. Note that if you select **Co-sponsor**, co-sponsors must have a signed MOU before starting the case activity, and you must select **Yes**.

Which type of community sponsorship group is the match?

Co-sponsor
 Support Team
 Private Sponsorship

Has the group signed an MOU?

Yes
 No
Co-sponsors must have a signed MOU before starting case activity.

MOU Filename

How many core services is the group responsible for delivering?
Number of core services *Must be 8 or more*

What is the group's required cash contribution?
Min. N/A *Must be 1 or more.*

What is the group's required in-kind contribution?
 Describe below N/A

Please describe the activities (wrap around services) the group is responsible for.

Have all core members of the group received training?
 Yes
 No
Note: All volunteers that interact directly with clients should receive training. If you need help accessing training or would like to request a training, please contact the Refugee Welcome Collective.

Have background checks been performed on all core members of the group?
 Yes
 No
Note: All volunteers that interact directly with clients need to complete a background check. If you need assistance on volunteer background checks, please contact the Refugee Welcome Collective.

Additional Volunteers

[Add Volunteer](#)

Additional volunteers are individuals who perform welcoming activities that promote client integration which are not associated with a community sponsorship group.

Volunteer Info.

Email Address *Required field.*

Cell Phone

First Name *Required field.*

Date of Match

Last Name *Required field.*

Time Commitment (Months)

[Previous](#) [Next](#)



Create and Match New Client

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Answer the question: “Has the group signed an MOU?” If yes, you will be given the option of uploading the digital file or a picture of the MOU to WelcomeWorks.

Note: A co-sponsor group is defined by the delivery of at least eight (8) core services. Please indicate if there is a required cash contribution and, if so, how much. Then, answer if there is a required in-kind contribution. Finally, describe any additional wrap-around activities for which the group will be responsible.

Please answer, “Have all core members of the group received training?” Then, “Have background checks been performed on all core members of the group?”

If there are **Additional Volunteers**, you have the option of adding an individual volunteer who is not already associated with the community sponsor group to be associated with this refugee client case. This is not always needed. However, a local office may have a relationship with an individual volunteer who, for example, provides one particular core service for nearly all clients.

After you have answered all questions, click **Next**.



Step 5

You are now on tab #4: **Sponsorship Information**.

1 Client Information 2 Client Address 3 Volunteer Information 4 Sponsorship Information 5 Review

Please select or create the community sponsorship group you are matching with this case

Is this an existing or new group?

Existing
 New

Sponsorship Group

Select Sponsorship Group

Previous Next

Once a sponsorship group has been entered into the system, you can match a new client with either a new or existing sponsorship group. If the sponsorship group already exists in WelcomeWorks, select **Existing**. All existing groups will show up in the drop-down menu when you click **Select Sponsorship Group**.

If the sponsorship group does not already exist in WelcomeWorks, select **New**.



Create and Match New Client

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Please select or create the community sponsorship group you are matching with this case

Is this an existing or new group?

Existing
 New

Name of group Required Type of group

Group Leader Information

Email Required. First Name Required. Last Name Required.

Total number of group members (including support volunteers)
 Required. Must be greater or equal to 1.

What statement best describes the community sponsorship group?
(Please select one)

Faith Community
 University/Higher Education Institution
 Social Club
 Civic, Lions or Rotary Club
 Sports/ Recreation Club

Community Service or Social Justice Club
 Non-profit Organization
 Company or Employment group
 Community Group
 Ethnic Community Based Organizations (ECBOs)
 Family or group of friends
 Group of volunteers brought together by affiliate
 Other

Date of Match 📅 Duration of commitment (in months)

Community Sponsorship Group Volunteers [Add Volunteer](#)

[Previous](#) [Next](#)



Create and Match New Client

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Enter the **Name of Group** (**Type of Group** is pre-filled for you), **Group Leader Information** (Email, First and Last Name), and the **Total Number of Group Members**. Please include all group members. You can go back later and edit, but it is easiest to enter the information if you have all group members at the beginning of the match. Then, answer the question: "What statement best describes the community sponsorship group?" You can choose only one of the options (i.e. faith community, social club, etc.). If a **Faith Community** is selected, you will be asked an additional question to indicate the specific faith community.

Now, enter **Date of Match**, **Duration of Commitment**, and then **Add Volunteer** for as many members of the community sponsorship group as required. Please note that you can edit at a later time in order to add more volunteers.

After you have answered all questions, click **Next**.



Step 6

You are now on tab #5: **Review**.

On this tab, you can review all entries. If any field/section is not properly completed, WelcomeWorks will flag the field/section. The field/section where the correction needs to be made will appear in red and/or with a red asterisk * and the **Submit** button will be faint like in the image below. To navigate to the error field/section, click **Previous**. Once at the tab, make the necessary corrections. You cannot move forward until you have corrected all errors.

1 Client Information 2 Client Address 3 Volunteer Information 4 Sponsorship Information 5 Review

Volunteer Information

Paired with Community Sponsorship Group: true
SponsorshipGroup Type: CoSponsorship
Signed MOU: *
Core Service Deliverables: *
Required Cash Contribution: *
Required In Kind Contributions:
All Core Members Trained:
All Core Members Provided Background Checks:

Case Volunteer Details

Email: *
First Name: *
Last Name: *
Cell Phone:
Date of Match:
Time Commitment (Months):

Sponsorship Group Details

Group Name: testing Sponsorship Group
Date of Match: 2023-10-09
Sponsorship Community Type: Faith Community
Faith Community Type: Christian
Total Group Members: 5
Duration of Commitment: 2
Duration of Commitment Max: 7

Sponsorship Group Volunteer Details

Is Group Leader: true Email: testinggroupleader First Name: Group Last Name: Leader

Previous Submit



Create and Match New Client

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The **Submit** button will only appear once there are no errors. After you have reviewed the information and there are no errors, click the **Submit** button.

Case Volunteer Details

Email: myself@myself.com	Cell Phone: (123) 333-33333
First Name: Testing Voll	Date of Match: 2023-10-19
Last Name: Testing Vol 1	Time Commitment (Months): 4

Sponsorship Group Details

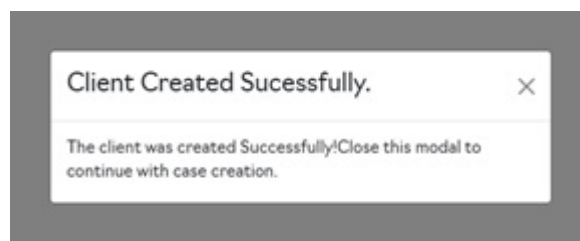
Group Name: testing Sponsorship Group	Total Group Members: 5
Date of Match: 2023-10-09	Duration of Commitment: 2
Sponsorship Community Type: Faith Community	Duration of Commitment Max: 7
Faith Community Type: Christian	

Sponsorship Group Volunteer Details

Is Group Leader: true Email: testinggroupleader@group.com First Name: Group Last Name: Leader

[Previous](#) [Submit](#)

You will then see a pop-up message (shown below) confirming that the client was successfully created.



Please note that an invitation to WelcomeWorks will be automatically sent to all sponsors and volunteers matched with the client once the client has been successfully created.

To create and match other clients in WelcomeWorks, you will repeat this process.



There may be times when you need to edit a client's information in WelcomeWorks.

You may wish to edit the contact address of a client after a move, or you may want to add a new family member who has been born, or you may need to add additional volunteers or members to a sponsorship group associated with a client. Follow the steps below.

After you have created clients, you will see a list of those clients when you click **Client** (see image below).

Client #	Status	Arrival Date	Primary Last Name	Primary First Name	City	Actions
00001	Active	9/18/2023	R&P1 Last Test	R&P1 First Test	FW1	☰
RP 245	Active	9/25/2023	RP client	Testing	Leghorn	☰
RP888	Active	9/1/2023	RP Brounahan	Testing	Mouse	☰
000Testing	Active	10/18/2023	DeletionRole	Testing	Me	☰

To begin editing a client, click the three horizontal lines icon with a drop-down (shown in the image above) next to the client you want to edit. The result of that action is the page view below.

Client #	Status	Arrival Date	Primary Last Name	Primary First Name	City	Actions
00001	Active	9/18/2023	R&P1 Last Test	R&P1 First Test	FW1	☰
RP 245	Active	9/25/2023	RP client	Testing	Leghorn	☰ View Case Activities Edit/View Client Details
RP888	Active	9/1/2023	RP Brounahan	Testing	Mouse	☰
000Testing	Active	10/18/2023	DeletionRole	Testing	Me	☰

You will have two options to choose from: **View Case Activities** or **Edit/View Client Details**. You can view or edit one client's case activities or details at a time.



Let's look at **Edit/View Client Details**.

To edit/view client details, click **Edit/View Client Details** from the drop-down option shown in the previous step.

The screenshot shows a multi-step form with five tabs: 1 Client Information, 2 Client Address, 3 Volunteer Information, 4 Sponsorship Information, and 5 Review. The 'Client Information' tab is active. The form contains the following fields and values:

Field	Value
Case Number	00001
Case Size	1
Client Date of Arrival at final destination	09/18/2023
Client Country of Origin	Afghanistan
Client Native Language	Arabic
Grant Tag	R&P
Other Languages Spoken	Afar, Amharic, Arabic, Belarusian
Does the client have a U.S. Tie?	<input type="radio"/> Yes <input checked="" type="radio"/> No

A dark blue 'Next' button is located at the bottom center of the form.

You are back at tab #1: **Client Information**. This allows you to edit all the clients', sponsors', and/or volunteers' information associated with the client. The instructions for editing client details are similar to creating a new client. You will have to go through all tabs by clicking **Next** on each tab after you have made the necessary edits until you are on tab #5: **Review**. Click the **Submit** button to submit all entries.

You did it! All your edits have been saved.



It's time to view client activities and group progress.

Remember your view when you click Clients and the action to take to view case activities? See the image below.

Client #	Status	Arrival Date	Primary Last Name	Primary First Name	City	Actions
00001	Active	9/18/2023	R&P1 Last Test	R&P1 First Test	Fwi1	☰ +
RP 245	Active	9/25/2023	RP client	Testing	Leghom	☰ +
RP888	Active	9/1/2023	RP Brouhahan	Testing	Mouse	☰ +
000Testing	Active	10/18/2023	DeletionRole	Testing	Me	☰ +

The three horizontal lines icon with a drop-down next to the client you want to view (see image below).

Client #	Status	Arrival Date	Primary Last Name	Primary First Name	City	Actions
00001	Active	9/18/2023	R&P1 Last Test	R&P1 First Test	Fwi1	☰ + View Case Activities Edit/View Client Details
RP 245	Active	9/25/2023	RP client	Testing	Leghom	
RP888	Active	9/1/2023	RP Brouhahan	Testing	Mouse	
000Testing	Active	10/18/2023	DeletionRole	Testing	Me	

To view case activities, click **View Case Activities** from the drop-down option shown above.

Client: R&P1 First Test R&P1 Last Test Activities		Group Progress
2023-09-26		
2023-09-26		
2023-09-26		

To view the case activities, click the clipboard icon.

Client Information

Created Date
2023-09-26

Which Client is this service provided to
00001

Service Activity

Additional wrap-around services

Assistance with buying computer and/or setting up Wi-Fi or internet

Case Notes

Donations



Viewing Client Activities

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You can click the drop-down icon to expand the view.

To edit any of those activities, If the client has performed any activity and the activity has been added by the volunteers or sponsors, click the pencil icon. Once you click the pencil icon, your view will look like the image below.

Community Sponsorship Activity Entry

1 Client Information 2 Service Activity 3 Case Notes 4 Donations 5 Review

Created Date
2023-09-26

Which client is this service provided to?
R&P1 First Test R&P1 Last Test

Next

Proceed to the tab where you wish to make edits. After those edits are made and you are on the **Review** tab, click on **Submit**.

Your edit is saved!



Group Progress

You can see the sponsorship group's progress report in WelcomeWorks. To see this, click on **Group Progress** in your **View Case Activities** view.

Client: Testing RP Brouhahah Activities View Activities

GROUP PROGRESS

Below is a list of activities completed by members in your group to date. Keep up the good work!

- Prepared and made arrangements for client(s) with special needs, if applicable (APA)
Completed By: Shannon RP Minion on 2023-09-10
- Conducted housing and safety orientation
Completed By: Shannon RP Minion on 2023-09-20
- Health Screening and Immunizations
Completed By: Shannon RP Minion on 2023-09-26
- Employment-related activity and support
Completed By: Shannon RP Minion on 2023-09-10
- Second Home Visit
Completed By: Brianne RP Leader on 2023-09-12
- Secured decent, safe, and sanitary housing
Completed By: Brianne RP Leader on 2023-09-13

The image above is a detailed view of the group's progress showing each completed activity and the group member who completed it.

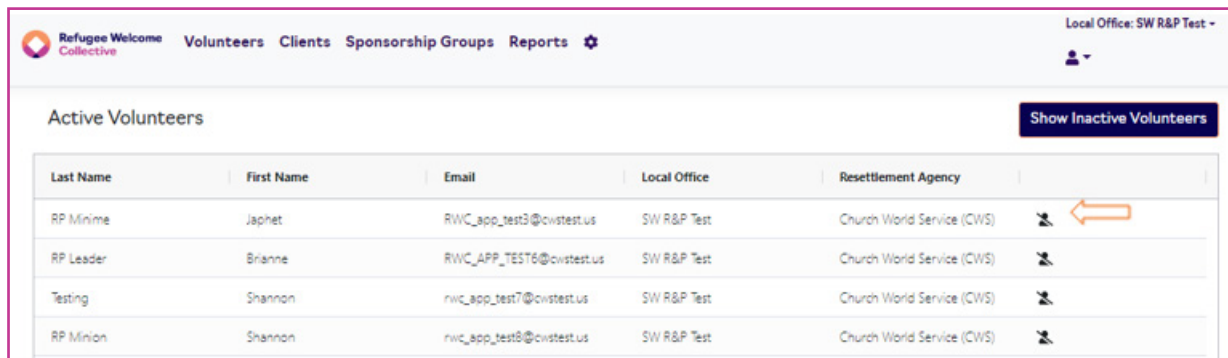


Deactivate Users

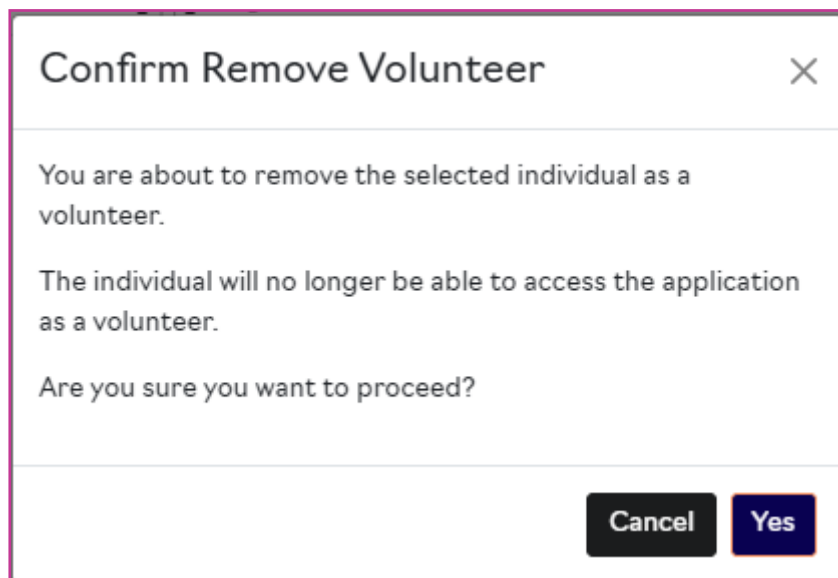
As a local office user, you can deactivate users in WelcomeWorks. There may be several reasons to deactivate a user (say, a volunteer) from using WelcomeWorks.

Let's see how you can do this.

Click **Volunteers** and your view will look like the image below.



Move your mouse (hover) over the person icon on the right of your screen (arrowed). You will see **Inactivate Volunteer**. Click on that person icon to begin the deactivation process. You will get a prompt (see image below) asking you to confirm your action.



If you click **Yes**, the user will no longer be able to access WelcomeWorks as a volunteer.



Deactivate & Reactivate Users

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To confirm that the volunteer has been deactivated, click **Show Inactive Volunteers**. The deactivated volunteer will be on the list (see image below).

Last Name	First Name	Email	Local Office	Resettlement Agency
Testing	Shannon	inv_app_test7@ovtest.us	SW R&P Test	Church World Service (CWS)

Reactivate Users

If you are ready to reactivate the already deactivated user, click **Show Inactive Volunteers** to see the list of already deactivated users (see image above).

To reactivate the user, click the person icon. You will get a message like in the image below asking you to confirm your action.

Confirm Reactivate Volunteer ×

You are about to reactivate the selected individual as a volunteer.

Are you sure you want to proceed?

Cancel Yes

Once you click **Yes**, the user will be reactivated and able to access WelcomeWorks as a volunteer. To confirm that the user has been reactivated, click **Show Active Users** and check to see that the user is on the active user list.



View, Edit, or Remove Sponsorship Groups

Click **Sponsorship Groups** on the top of your screen to see the list of the sponsorship groups attached to your local office.

Name	Associated Cases	Types	Total Group Members	Deleted	Actions
Shannon TESTING	00001	CoSponsorship	5	false	
RP Testing PUBUC	RP 245, 000Testing	Support Team	3	false	
RP Mega Man	RP888	Support Team	3	false	

You will see the **Actions** column on the right of your screen (circled above). In the Actions column, you will be able to perform three actions: view volunteers, edit sponsorship groups, and remove sponsorship groups.

Viewing Sponsorship Groups

To view, click the person icon. You cannot perform any other action than to view the volunteers in that sponsorship group.

Email	First Name	Last Name	Active Member	Actions
nrc_app_test7@cwstest.us	Shannon	Testing	true	

Editing Sponsorship Groups

To edit the name of a sponsorship group, click the pen icon in the **Actions** column. You can only edit the name of the sponsorship groups. After you have done that, click **Update**.

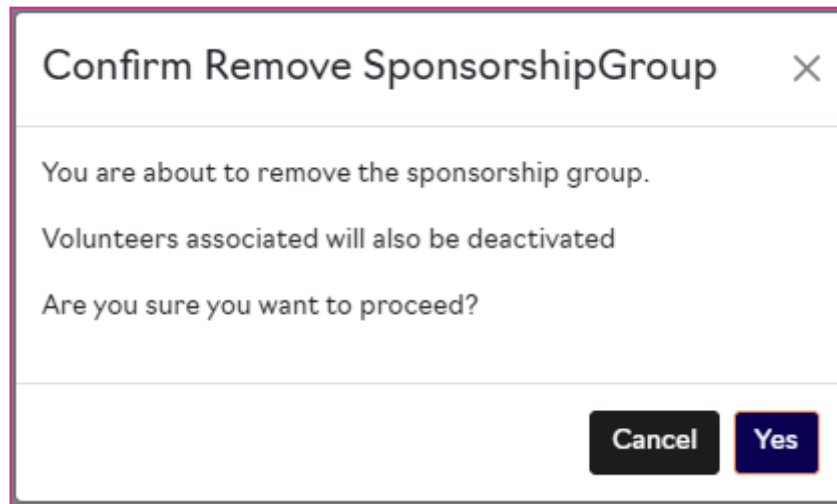
Name	Total Group Members	Deleted
<input type="text" value="Shannon TESTING"/>	<input type="text" value="5"/>	<input type="text" value="False"/>
<input type="button" value="Cancel"/> <input type="button" value="Update"/>		



View, Edit, or Remove Sponsorship Groups

Removing Sponsorship Groups

As a local office user, you can remove a sponsorship group that is attached to your office. To do this, click the delete button, which is represented by a trash can icon. A prompt will appear asking you to confirm your action.

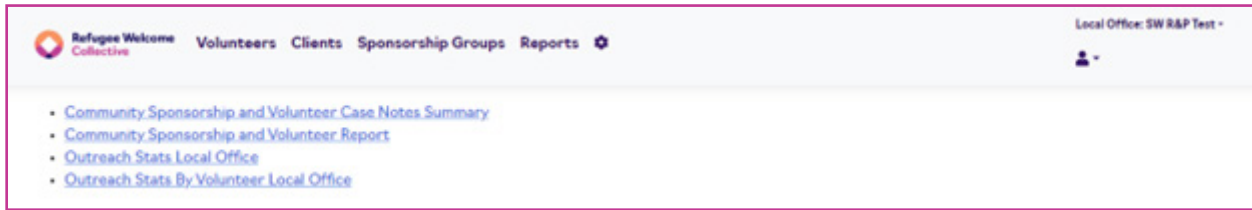


If you click **Yes**, the sponsorship group will be removed from the list of sponsorship groups associated with your local office.

Note: once you remove the sponsorship group, all the volunteers associated with the group will also be deactivated. Please be sure this is what you intend to do before you proceed.



Get started with reports by clicking on the Reports tab.



The **Reports** tab returns four types of reports that the user can use/access. They are the **Community Sponsorship and Volunteer Case Notes Summary**, **Community Sponsorship and Volunteer Report**, **Outreach Stats Local Office**, and **Outreach Stats by Volunteer Local Office** reports. You are welcome to navigate any of these reports if they are important for your reporting.

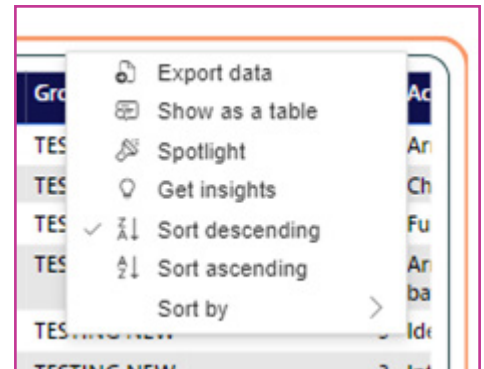
All reports are filterable. Familiarize yourself with the filters on the left side of the screen. These filters include **Group Type**, **Sponsorship Type**, **Client Number**, **Date of Arrival**, **Faith Type**, **Section**, **Grant Tag**, **Ethnicity**, **Welcome Story**, **Immigration Story**, **Gender**, **Employment**, and **Age Bracket**. You are welcome to use any filter that applies to your report interest.

These reports have two dynamic views: **Overview** and **Details**. Overview visualizes the reports in bar and pie charts, while the Details view provides the raw data. It is important to note that reports take 24 hours to be synced in the system. Once you enter some details, allow 24 hours for those new updates to be shown on the reports.



First, we will go over the reports the local offices will find helpful in their work.

To export case notes to an Excel spreadsheet, move your cursor to the right-top of the report, and hover your mouse on that spot till you see three dots ... for more options. Click on the three dots to see these options.



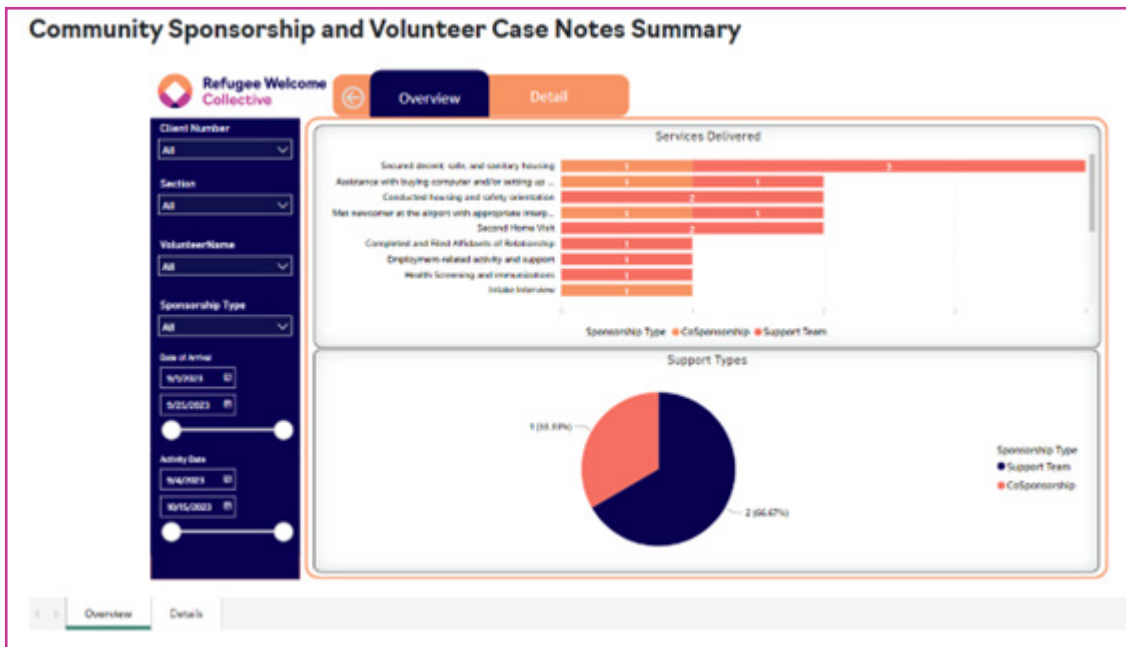
Click on **Export Data** to export the data. You can toggle the other options for further desired actions.



Community Sponsorship and Volunteer Case Notes Summary

This report presents a summary of the community sponsorship type and volunteer case notes. The volunteers here can be the sponsors or independent volunteers who are engaged in the welcoming work with the client.

Click **Community Sponsorship and Volunteer Report** and then click the **Overview** tab.





Then, click the **Details** tab.

Community Sponsorship and Volunteer Case Notes Summary

Refugee Welcome Collective

Overview Detail

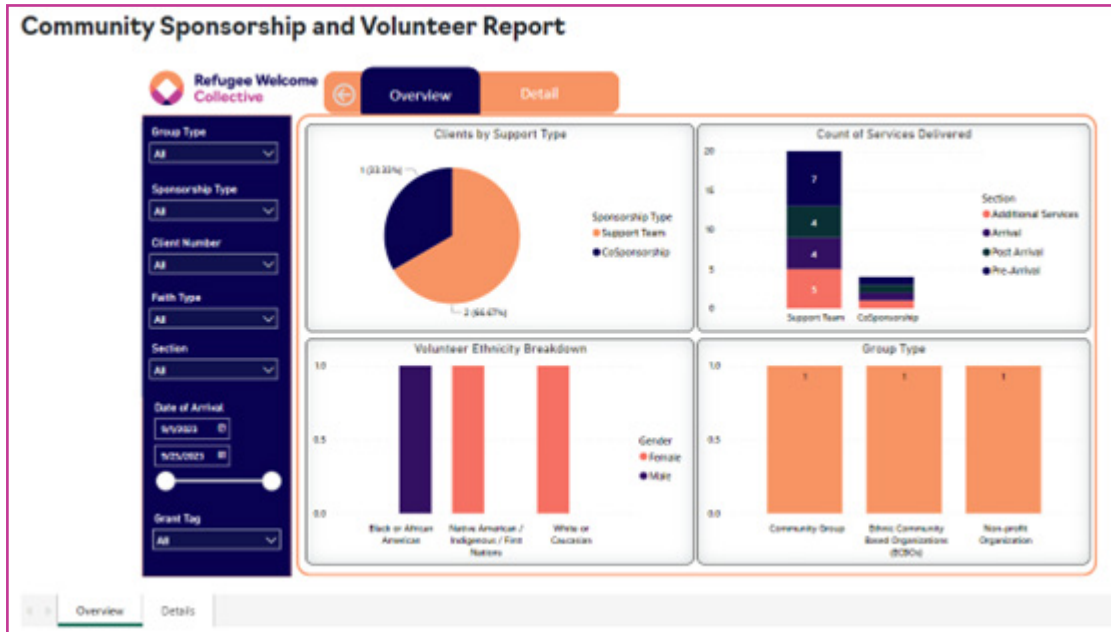
Client Number	Primary Applicant First Name	Primary Applicant Last Name	Volunteer Name	Sponsorship Type	Group Name	Services Completed	Activity
RP 245	Testing	RP client	RP Miriam, Japhet	Support Team	RP Testing PUBLIC	11	Assess
RP 245	Testing	RP client	RP Miriam, Shannon	Support Team	RP Testing PUBLIC	11	Comp
RP 245	Testing	RP client	RP Miriam, Japhet	Support Team	RP Testing PUBLIC	11	Meet
RP 245	Testing	RP client	RP Miriam, Shannon	Support Team	RP Testing PUBLIC	11	Prearr
RP 245	Testing	RP client	RP Miriam, Shannon	Support Team	RP Testing PUBLIC	11	Prearr
RP 245	Testing	RP client	RP Miriam, Shannon	Support Team	RP Testing PUBLIC	11	Prearr
RP 245	Testing	RP client	RP Miriam, Shannon	Support Team	RP Testing PUBLIC	11	Secur
RP 245	Testing	RP client	RP Leader, Brianna	Support Team	RP Testing PUBLIC	11	Secur
RP 245	Testing	RP client	RP Miriam, Japhet	Support Team	RP Testing PUBLIC	11	Secur
RP 245	Testing	RP client	RP Leader, Brianna	Support Team	RP Testing PUBLIC	11	Sharr
RP000	Testing	RP Broukahah	RP Miriam, Japhet	Support Team	RP Mega Man	9	Consb
RP000	Testing	RP Broukahah	RP Miriam, Shannon	Support Team	RP Mega Man	9	Consb
RP000	Testing	RP Broukahah	RP Miriam, Shannon	Support Team	RP Mega Man	9	Emplo
RP000	Testing	RP Broukahah	RP Miriam, Shannon	Support Team	RP Mega Man	9	Prearr
RP000	Testing	RP Broukahah	RP Miriam, Japhet	Support Team	RP Mega Man	9	Other
RP000	Testing	RP Broukahah	RP Miriam, Shannon	Support Team	RP Mega Man	9	Prearr
RP000	Testing	RP Broukahah	RP Miriam, Japhet	Support Team	RP Mega Man	9	Prearr
RP000	Testing	RP Broukahah	RP Leader, Brianna	Support Team	RP Mega Man	9	Secur
RP000	Testing	RP Broukahah	RP Leader, Brianna	Support Team	RP Mega Man	9	Secur
00001	R&PI First Test	R&PI Lead Test	RP Miriam, Japhet	CoSponsorship	Shannon TESTING	4	Asses

Scroll to the right and find case notes for each activity.

Community Sponsorship and Volunteer Report

This report shows the type of community sponsorship and volunteer report. You will see the volunteer ethnicity breakdown and type. You will also see the number of services the volunteer has delivered divided into four key sections: Additional Services, Arrival, Post Arrival, and Pre-Arrival.

Click on **Community Sponsorship and Volunteer Report**. The **Overview** tab offers some data visualizations in pie and bar charts.



Now, click on the **Details** tab.

Community Sponsorship and Volunteer Report

Refugee Welcome Collective

Overview | Detail

Group Type: All
Sponsorship Type: All
Client Number: All
Faith Type: All
Section: All
Date of Arrival: 1/1/2023 - 12/31/2023
Grant Tag: All

Client Number	Number of People in Group	Group Name	Primary Applicant First Name	Primary Applicant Last Name	Signed Mtd.	Received Training	Backlog
RP000	3	RP Mega Man	Testing	RP Brouhahah	True	True	True
RP 245	3	RP Testing PUBLIC	Testing	RP client	True	True	True
00001	5	Shannon TESTING	R&P First Test	R&P Last Test	True	True	True
Total							



Outreach Stats by Volunteer Local Office

Click on **Outreach Stats by Volunteer Local Office** to access this report. In the Outreach Stats by Volunteer Local Office Report, the local office users can filter the report by the filters on the left of their screen. The overview and details views are divided into three tabs: **Demographics**, **Engagement**, and **Basis**.

In **Demographics**, the local office user will be able to see info on gender, race-ethnicity, age, and employment.





In **Engagement**, the local office user will be able to see info on immigration story, language, and welcome story.



In **Basis**, the local office user will be able to see info on support type, group type, and faith type.



The local office user can toggle to the **Details** tab to see the data of each previous tab.

X Logging Out

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After you have completed all you wanted to do in WelcomeWorks, to log out of the system, click the person icon found on the right side of the screen (seen here).

Then, click the **Log Out** button.



You have successfully logged out of the system.



30-Day User Lockout

WelcomeWorks is a tool housed in the CWS IT environment, and the CWS IT environment is bound by FISMA (the Federal Information Security Management Act). FISMA is a law put in place “to reduce the security risk to federal information and data.” One of the security protocols set by CWS IT, in compliance with FISMA, per Administrative and Logical controls, is the requirement that account holders must ensure that they log into their accounts within a 30-day period. If not, they will be locked out. All WelcomeWorks users are account holders in the CWS IT environment and this security protocol, by extension, applies to them.

To ensure the user's optimal compliance with this requirement, we ask that you log into your account at least once within a 30-day period to avoid being locked out. However, if you are locked out, we can work with CWS IT to restore your access. If this happens, please reach out to RWC at welcomeworks@cwsglobal.org.

Need Help?

Contact info@refugeewelcome.org
with questions and suggestions.

Refugee Welcome Collective is a project of CWS under an agreement paid for by the U.S. Department of State.