Welcome Works

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.

Manual last updated on 11/10/23

Refugee Welcome Collective

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

Table of Contents

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.

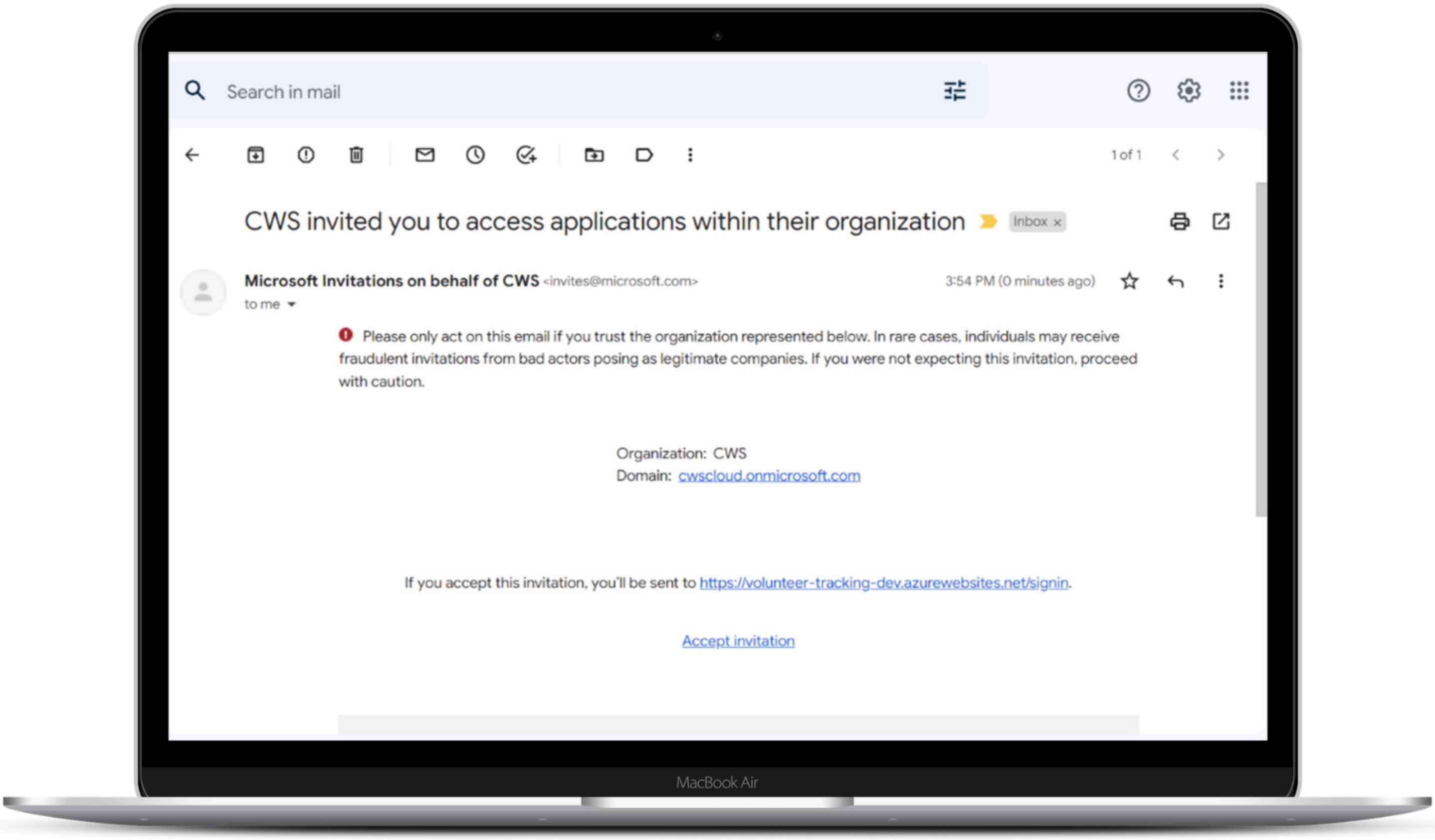
8. A local office user can view the progress of their volunteers and sponsors.

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.

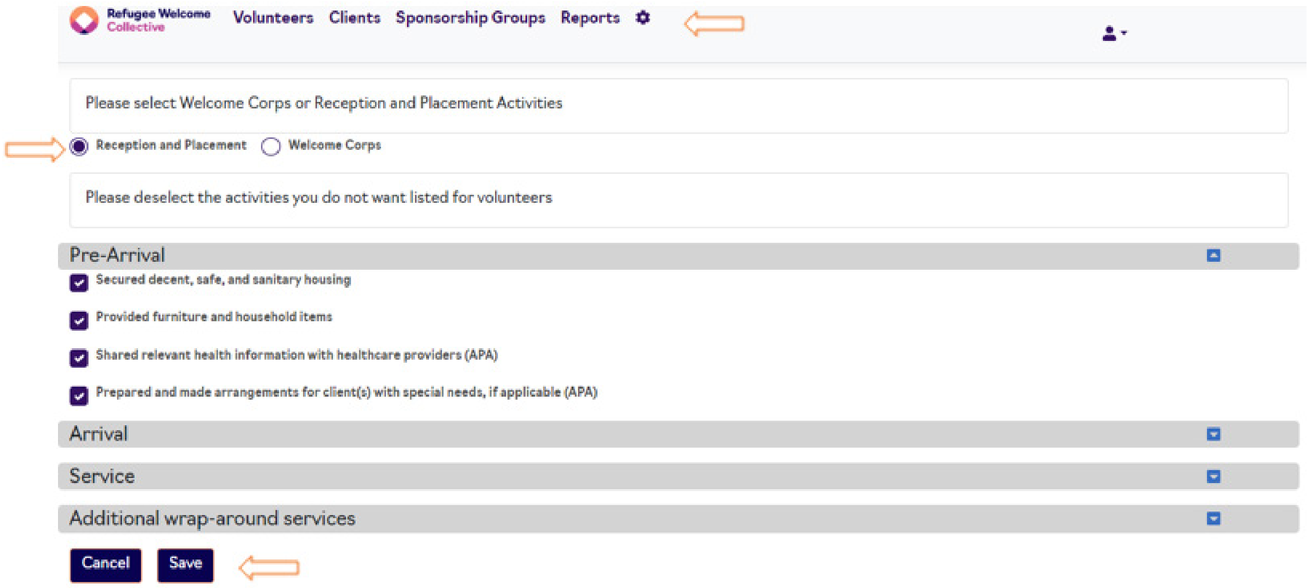
When prompted, enter your sign-in credentials: email and password. You may be asked to provide a verification code sent to your email. Read the permissions requested by CWS and click **Accept**.

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 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:

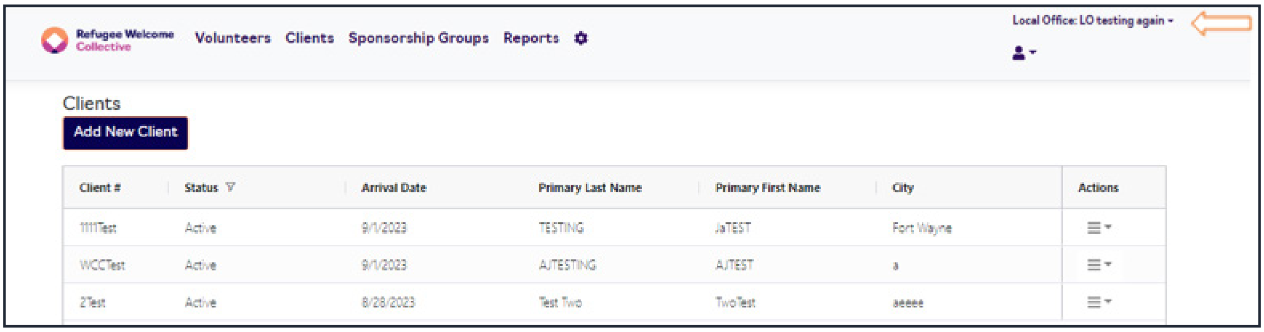
- **Volunteers**
- **Clients**
- **Sponsorship Groups**
- **Reports**
- **Settings**

One email for multiple roles

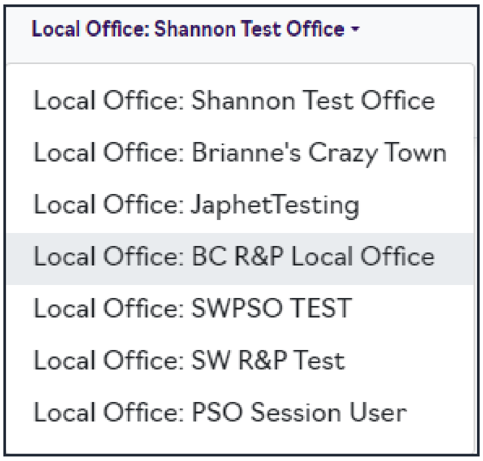
If you have multiple roles in WelcomeWorks that are associated with your email address, you can access all roles without logging out of your account. This is a new update that ensures that users can now select any role they want to access by simply choosing the role in their dashboard.

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.



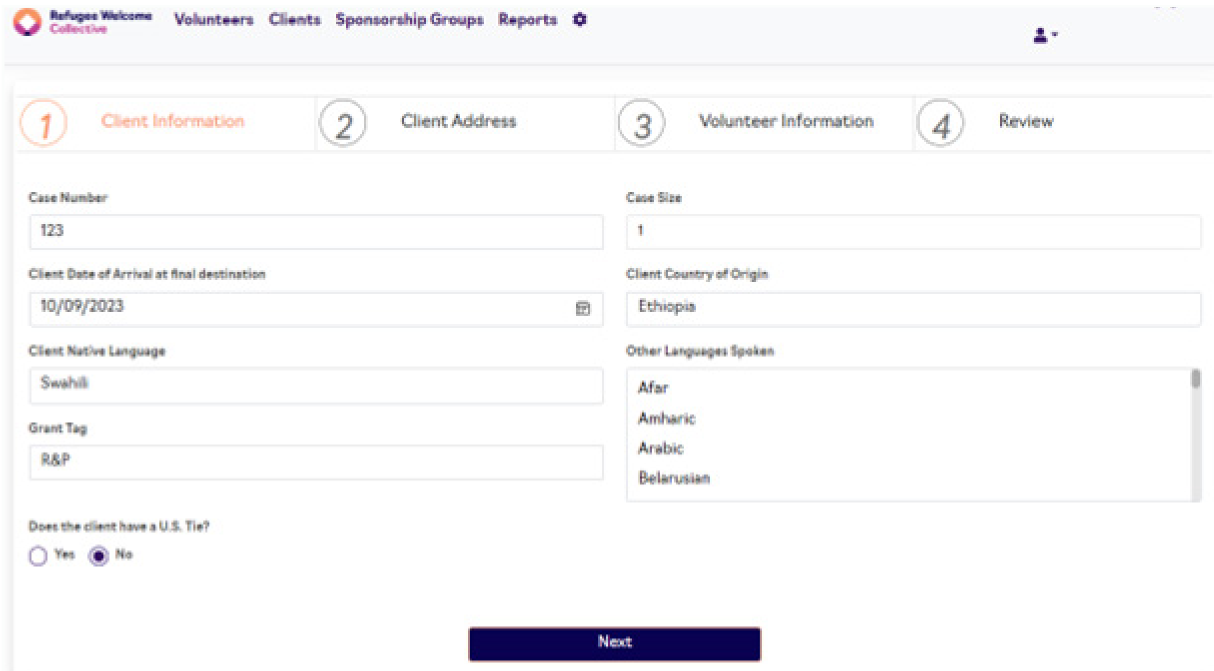
On the top right corner of your screen, you will see a drop-down (see arrow above). Click the drop-down to choose the role you want to access.



Now, create a new refugee client profile.

Step 1

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



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**.

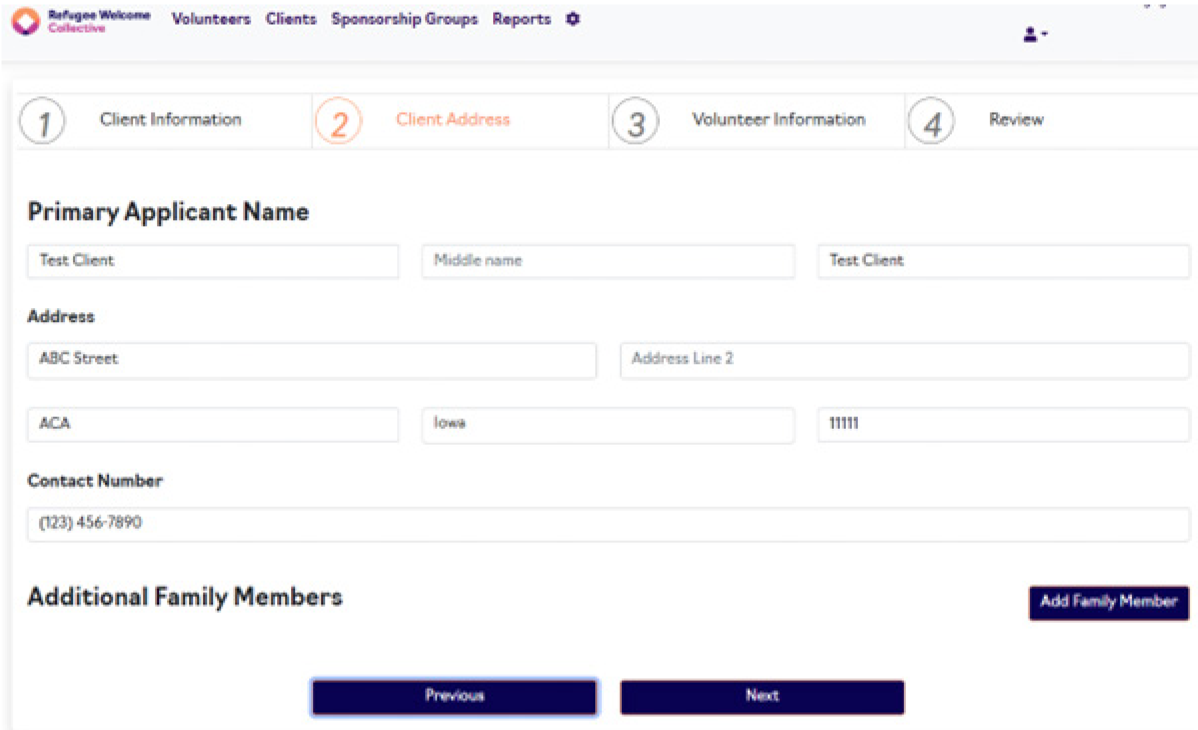
You can add **Additional Language Spoken**, if applicable. You can also indicate if a client has a U.S. Tie. If yes, you can add the **U.S. Tie Name**, **Phone Number**, and **Language Spoken**.

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**.

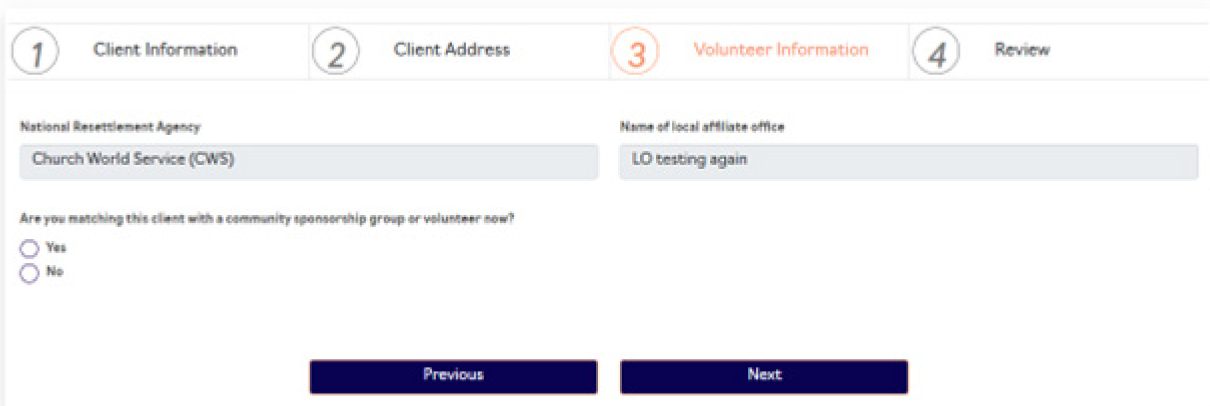


Then, add family members for refugee client cases of more than one. Add as many family members as applicable for the client family.

Click **Next**.

Step 4

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



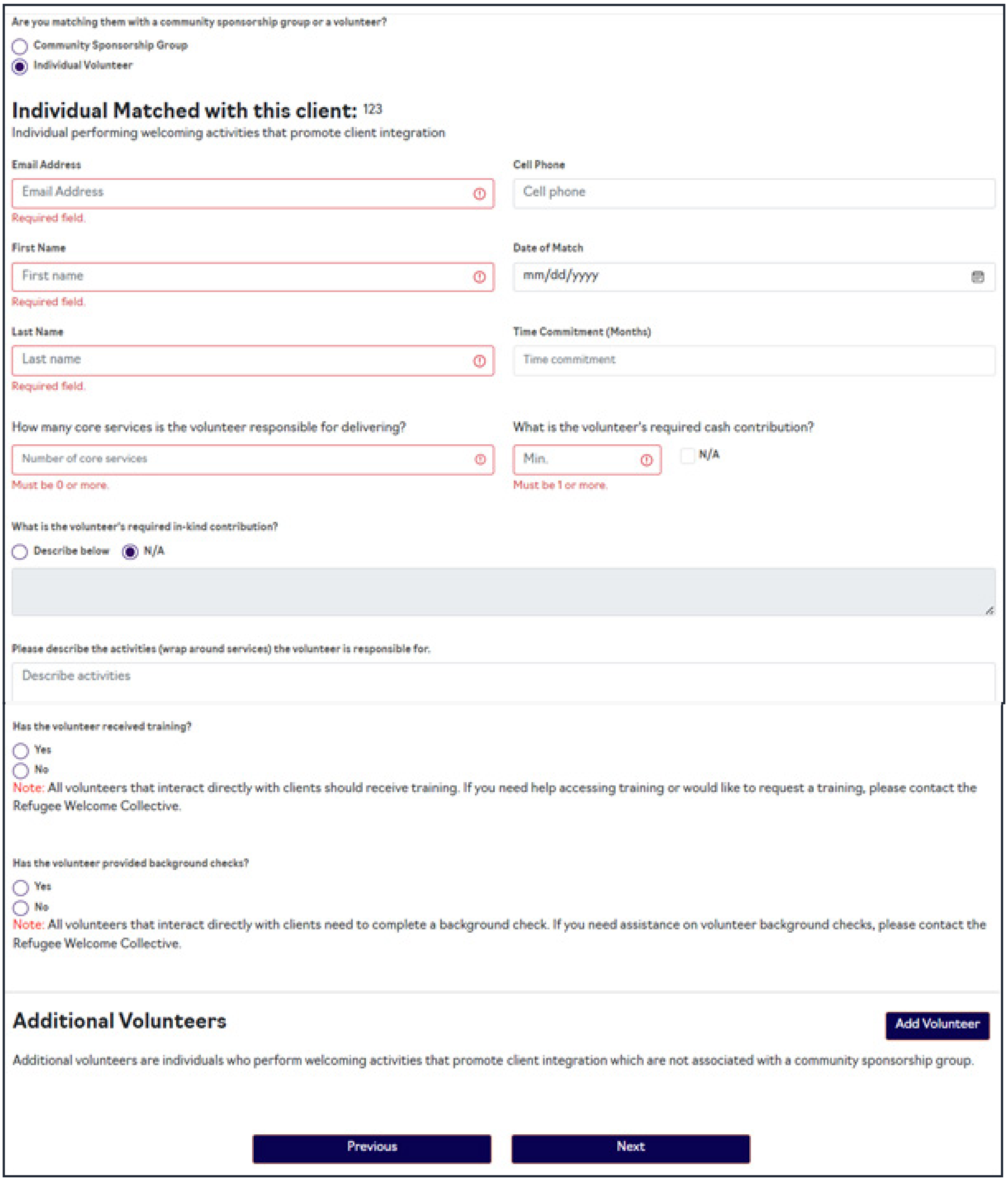
The **National Resettlement Agency** and the **Name of Local Affiliate Office** will be auto-filled. The reason is that as a local office (user), you were created in WelcomeWorks by your national office (user) who provided the name of your national resettlement agency and local affiliate office.

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

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

Add Volunteer

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

Previous Next

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.

Describe activities

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

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

Previous | Next

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.

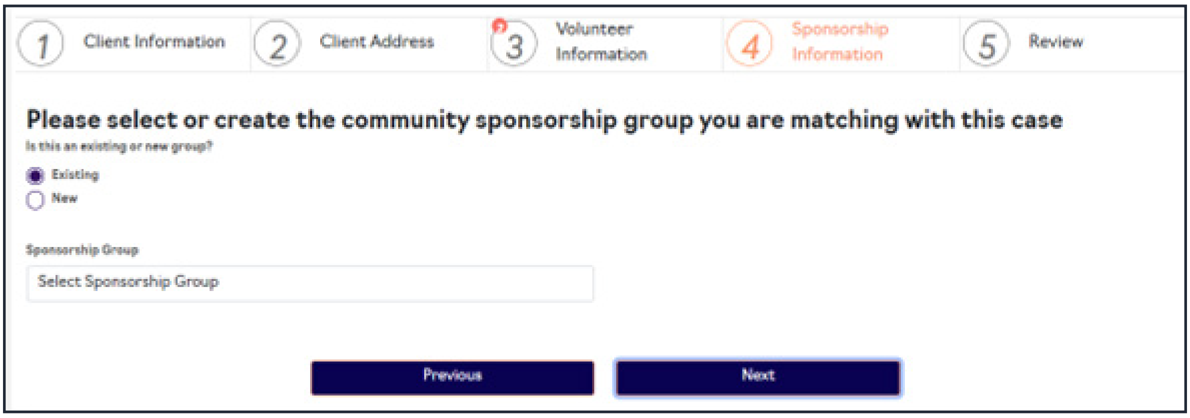
Please answer, “Have all core members of the group received training?” Then, “Have background checks been performed on all core members of the group?”

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**.

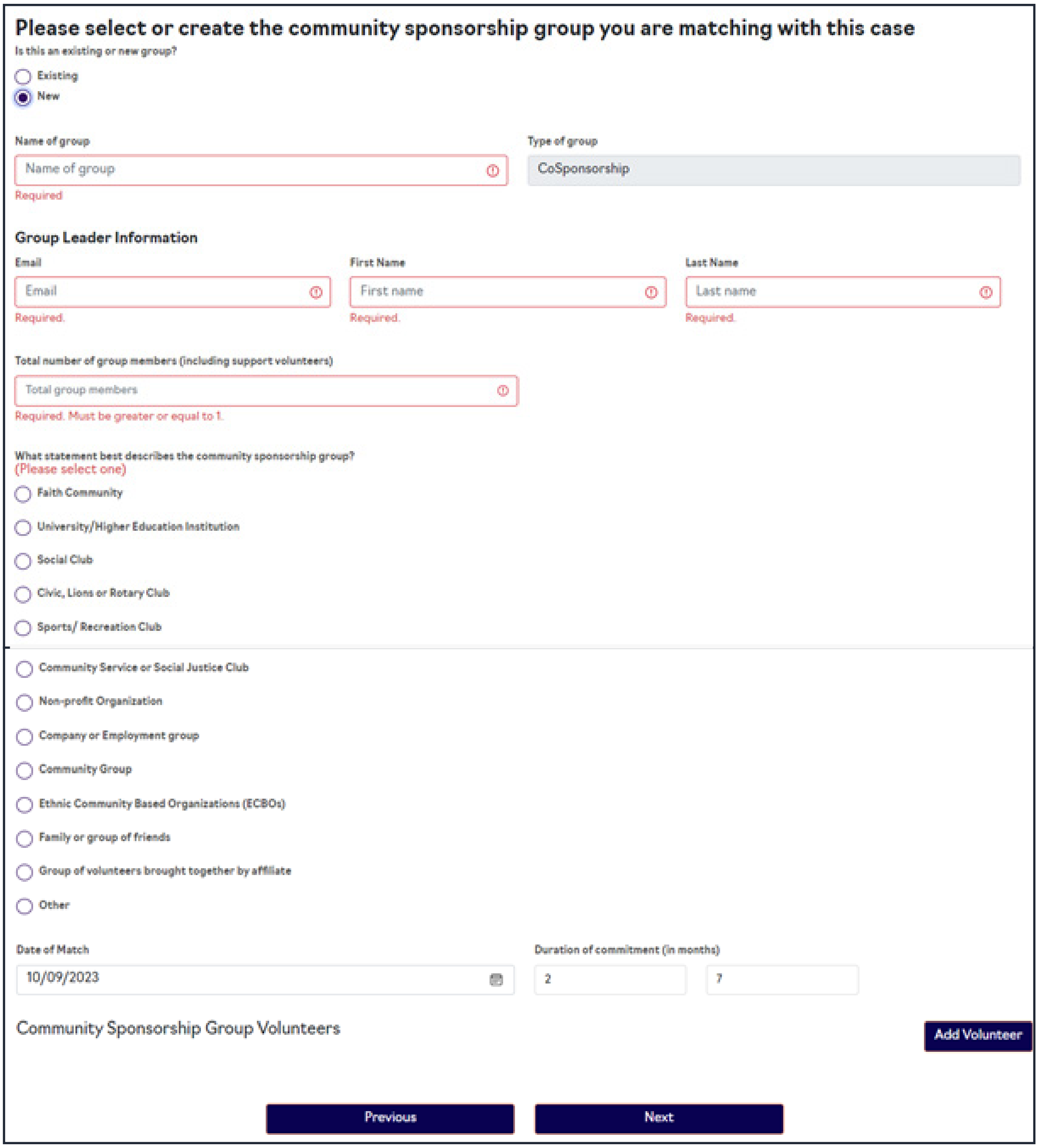
Step 5

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



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**.



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: Name of group — Required

Type of group: CoSponsorship

Group Leader Information

Email: Email — Required.

First Name: First name — Required.

Last Name: Last name — Required.

Total number of group members (including support volunteers): Total group members — 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: 10/09/2023

Duration of commitment (in months): 2 | 7

Community Sponsorship Group Volunteers

Add Volunteer

Previous | Next

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.

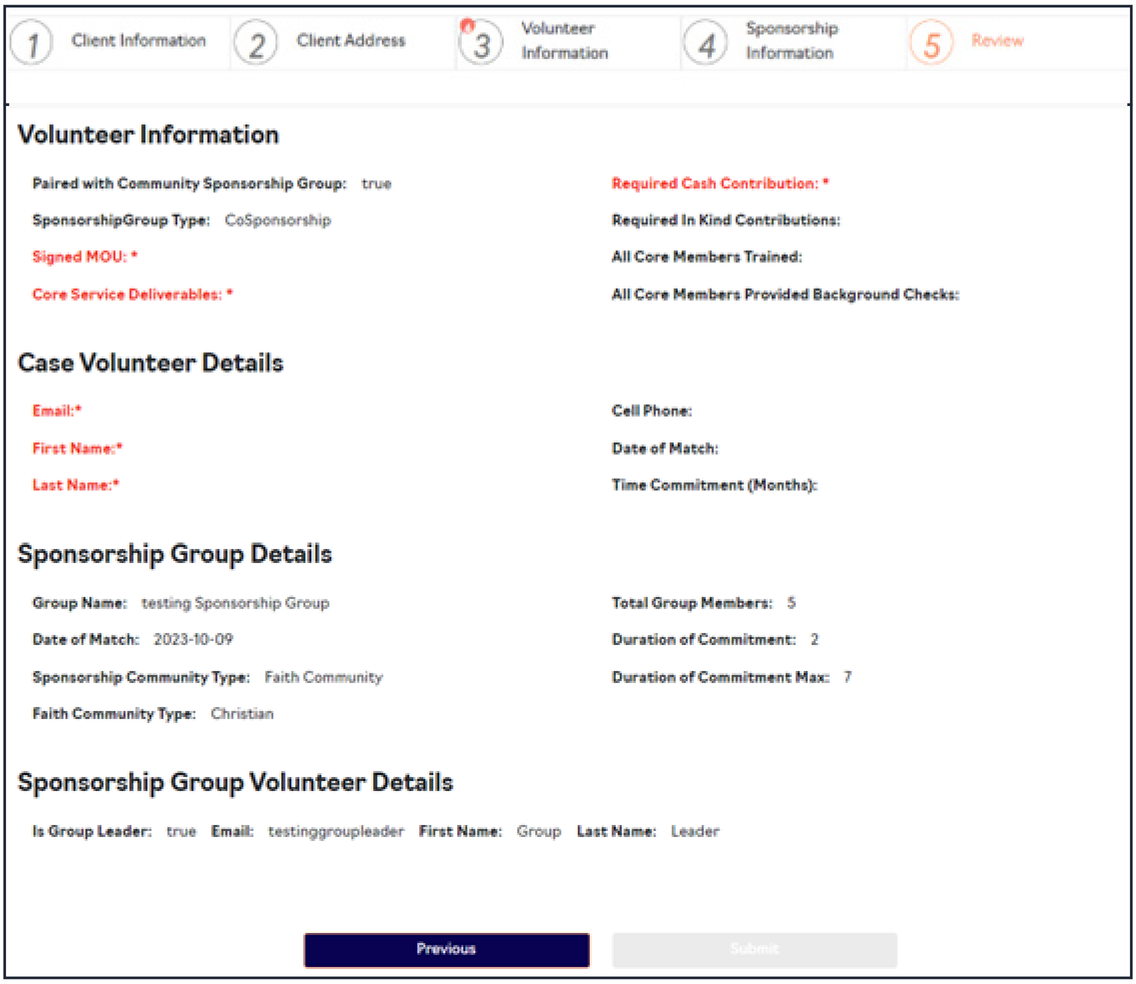
Now, enter **Date of Match**, **Duration of Commitment**, and then **Add Volunteer** for as many members of the community sponsorship group as required. Please not that you can edit at a later time in order to add more volunteers.

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

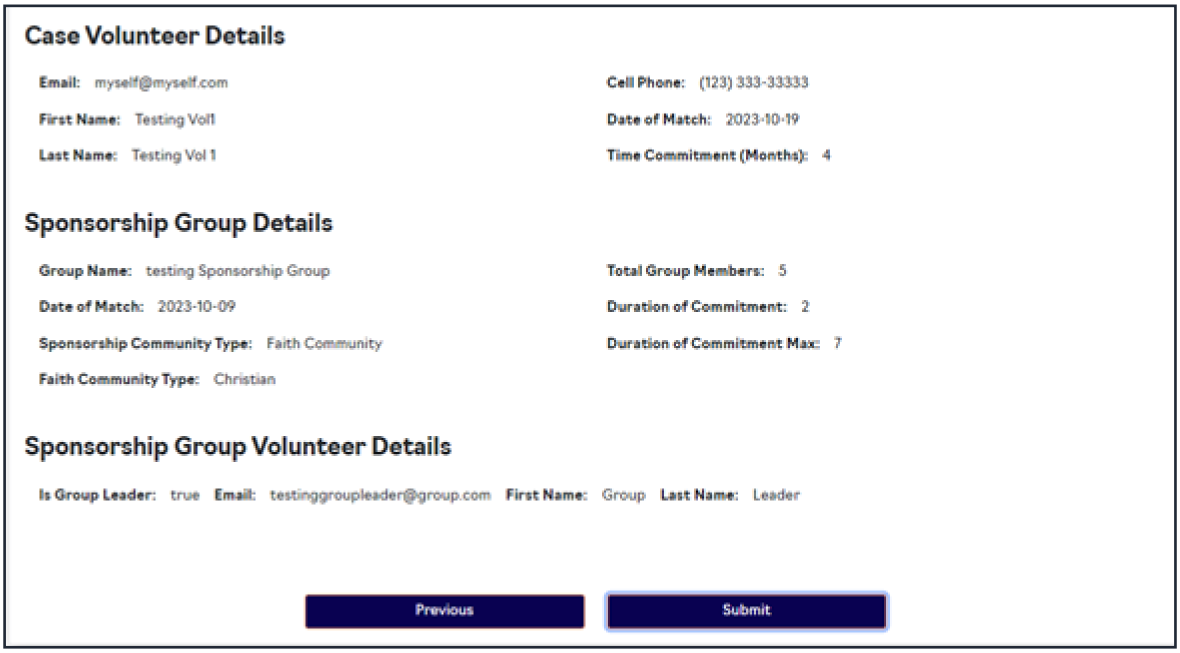
Duration of Commitment Max: 7

Sponsorship Group Volunteer Details

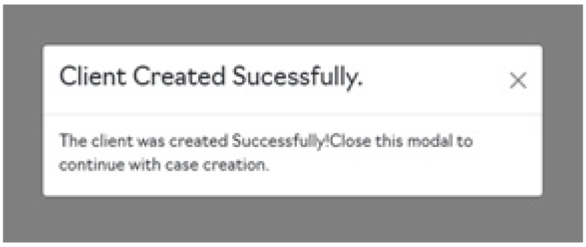
Is Group Leader: true Email: testinggroupleader First Name: Group Last Name: Leader

Previous Submit

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.



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



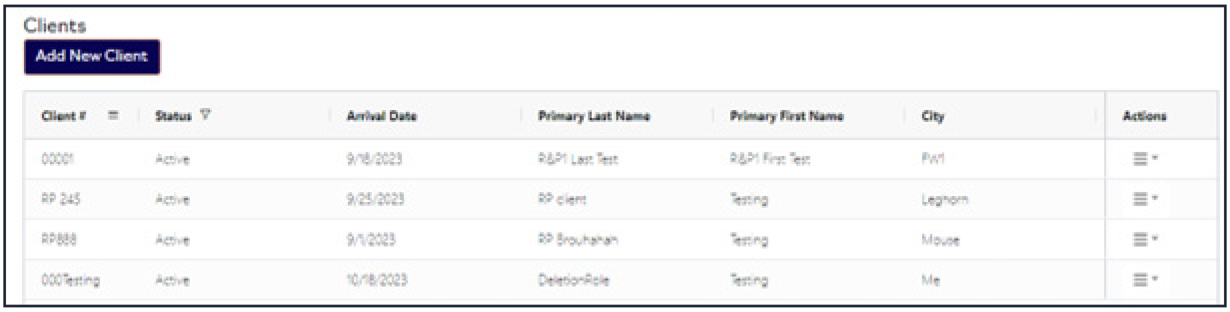
Please note that an invitation to WelcomeWorks will be automatically sent to all sponsors and volunteers matched with the client once the client has been successfully created.

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.

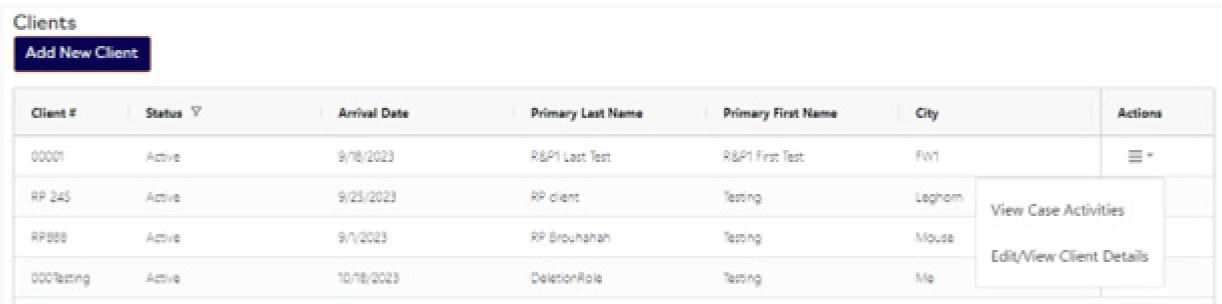
After you have created clients, you will see a list of those clients when you click **Client** (see image below).


Clients

Add New Client

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 Brouhahah	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.


Clients

Add New Client

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 Brouhahah	Testing	Mouse	
000Testing	Active	10/18/2023	DeletionRole	Testing	Me	

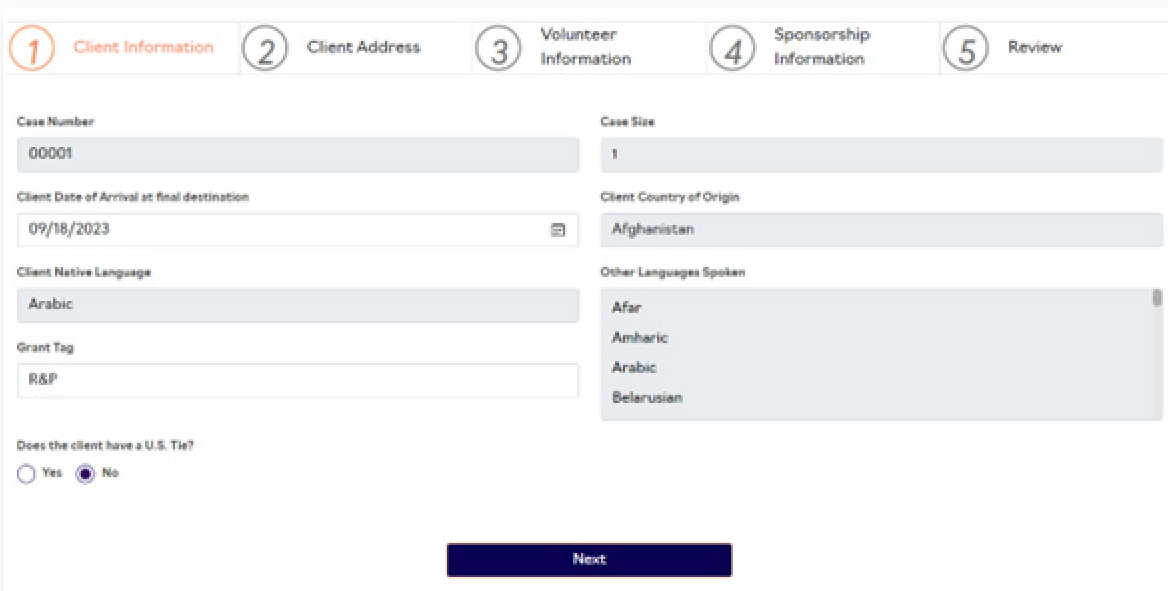
View Case Activities

Edit/View Client Details

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.

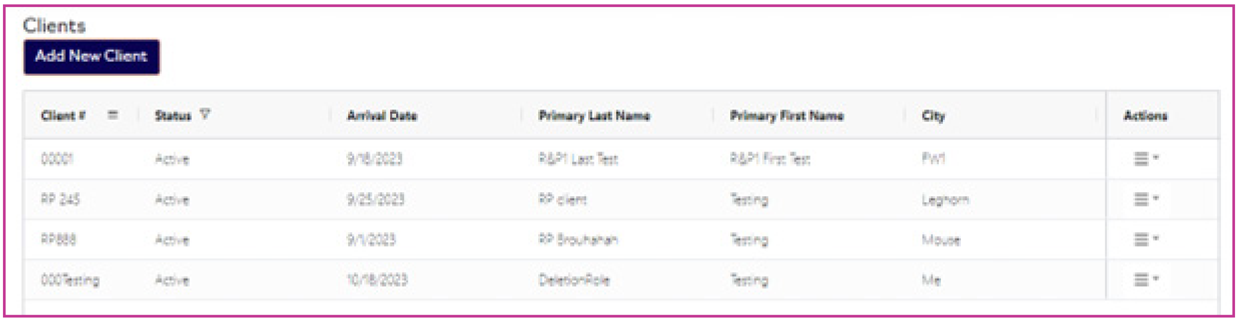


You are back at tab #1: **Client Information**. This allows you to edit all the clients', sponsors', and/or volunteers' information associated with the client. The instructions for editing client details are similar to creating a new client. You will have to go through all tabs by clicking **Next** on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

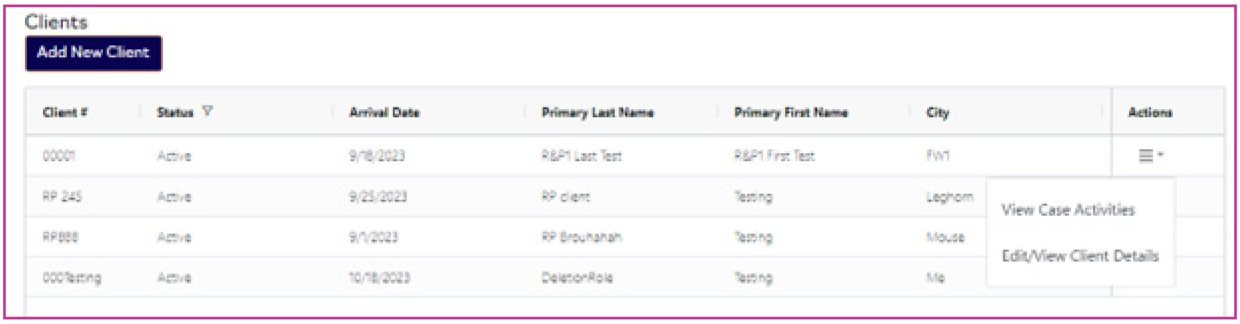
You did it! All your edits have been saved.

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.



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

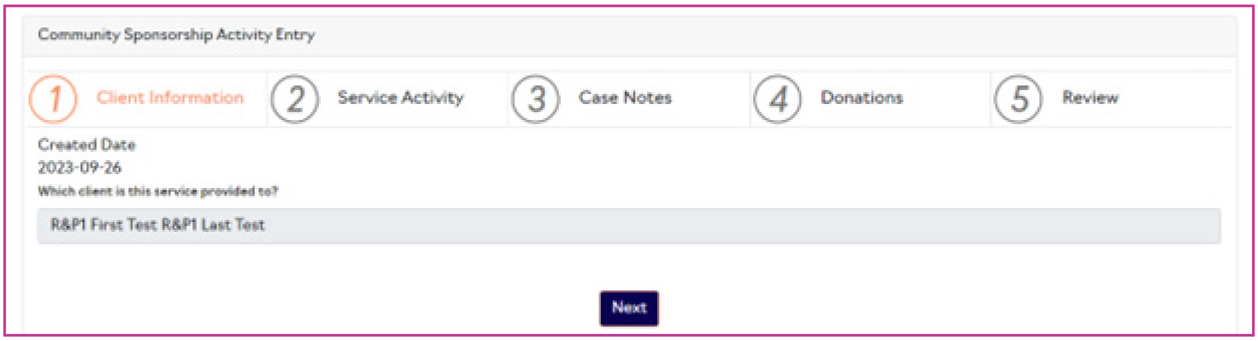


To view case activities, click **View Case Activities** from the drop-down option shown above.

To view the case activities, click the clipboard icon.

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.

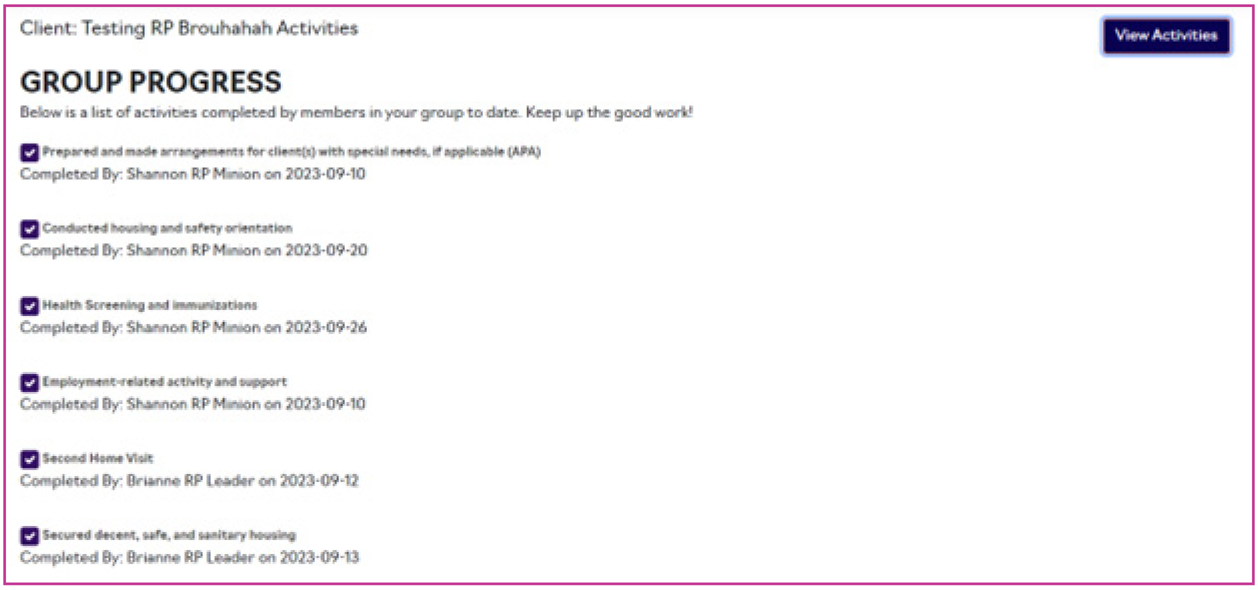


Proceed to the tab where you wish to make edits. After those edits are made and you are on the **Review** tab, click on **Submit**.

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.



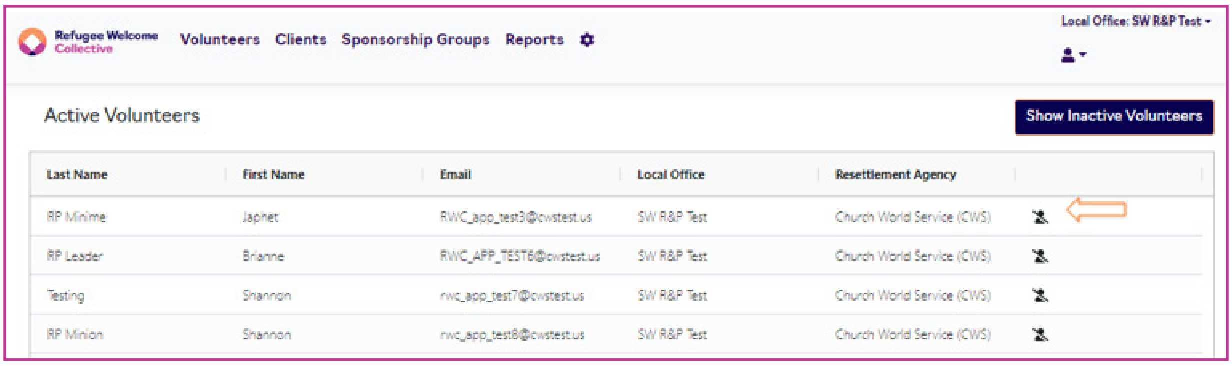
The image above is a detailed view of the group's progress showing each completed activity and the group member who completed it.

Deactivate Users

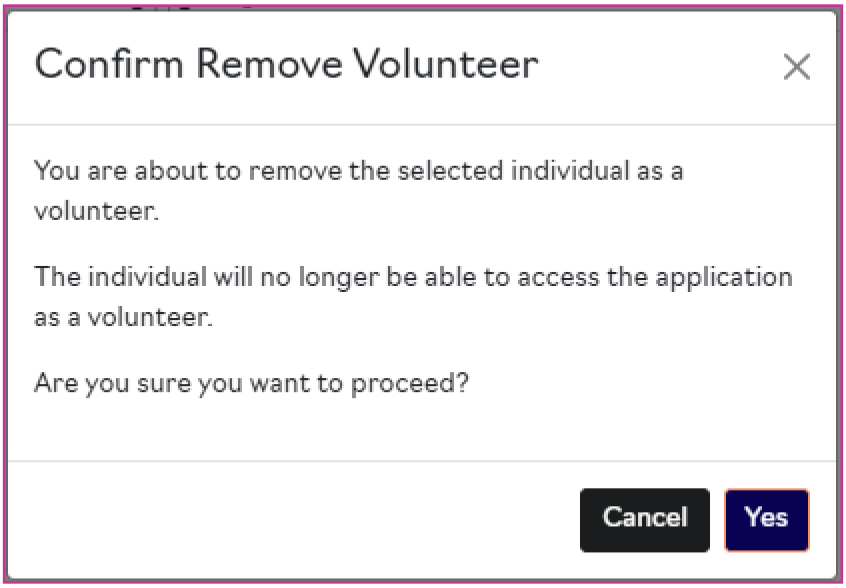
As a local office user, you can deactivate users in WelcomeWorks. There may be several reasons to deactivate a user (say, a volunteer) from using WelcomeWorks.

Let's see how you can do this.

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

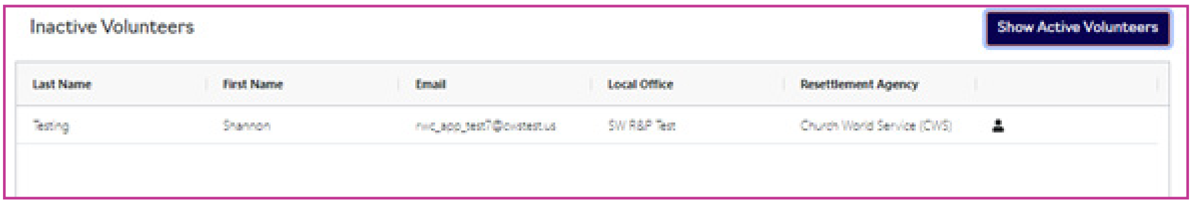


Move your mouse (hover) over the person icon on the right of your screen (arrowed). You will see **Inactivate Volunteer**. Click on that person icon to begin the deactivation process. You will get a prompt (see image below) asking you to confirm your action.



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

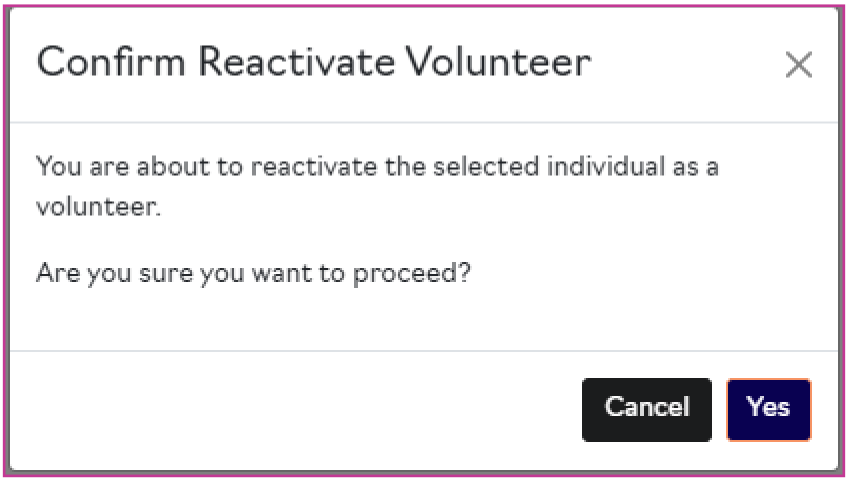
To confirm that the volunteer has been deactivated, click **Show Inactive Volunteers**. The deactivated volunteer will be on the list (see image below).



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.



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.

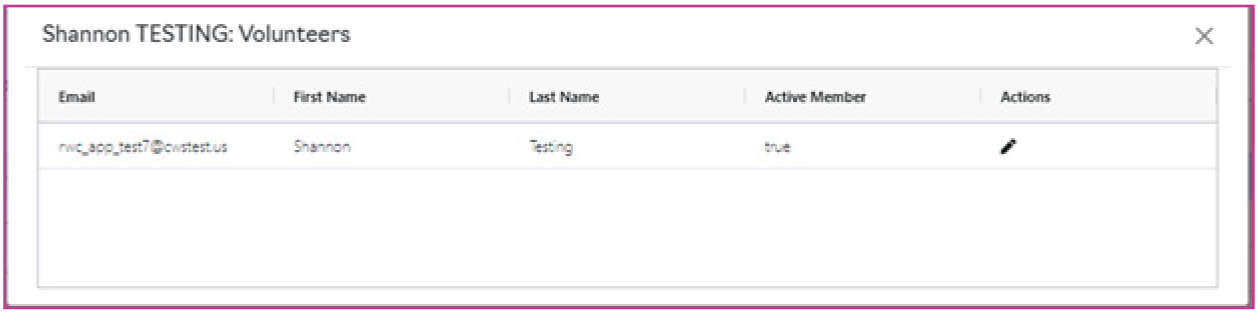
View, Edit, or Remove Sponsorship Groups

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

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.

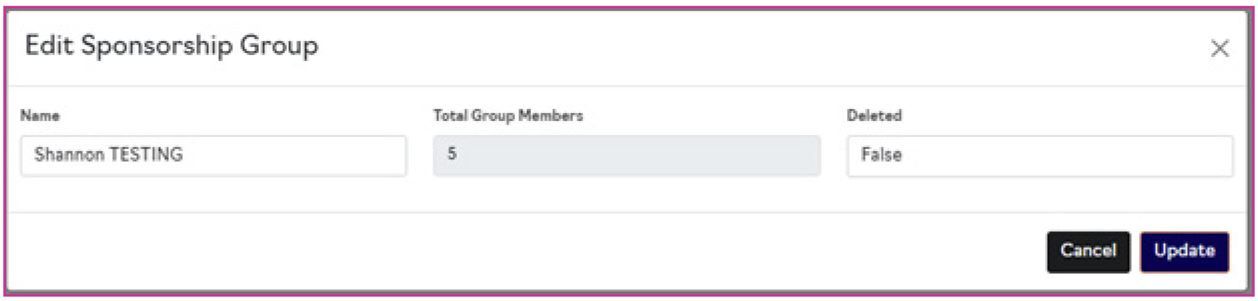
Viewing Sponsorship Groups

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



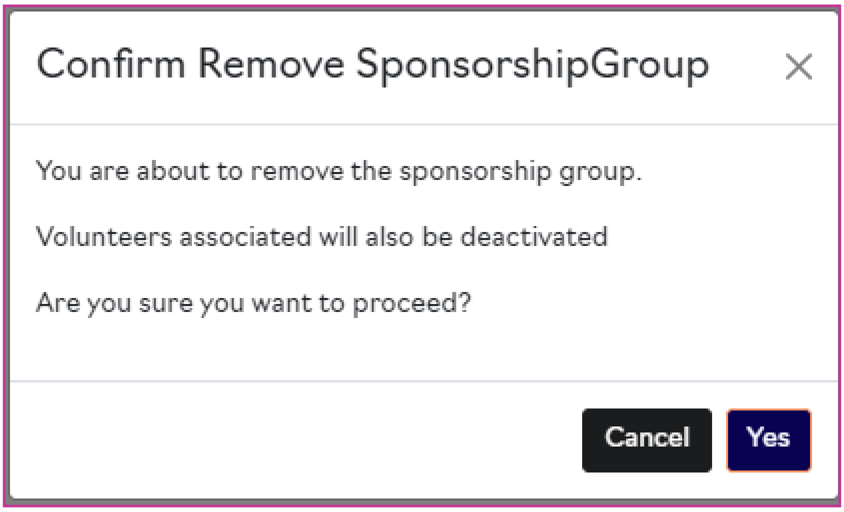
Editing Sponsorship Groups

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**.



Removing Sponsorship Groups

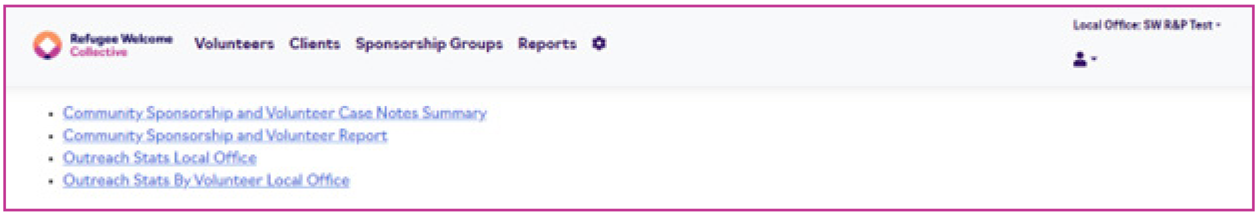
As a local office user, you can remove a sponsorship group that is attached to your office. To do this, click the delete button, which is represented by a trash can icon. A prompt will appear asking you to confirm your action.



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.



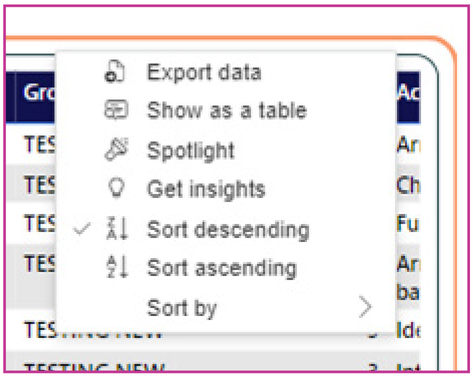
The **Reports** tab returns four types of reports that the user can use/access. They are the **Community Sponsorship and Volunteer Case Notes Summary, Community Sponsorship and Volunteer Report, Outreach Stats Local Office**, and **Outreach Stats by Volunteer Local Office reports**. You are welcome to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

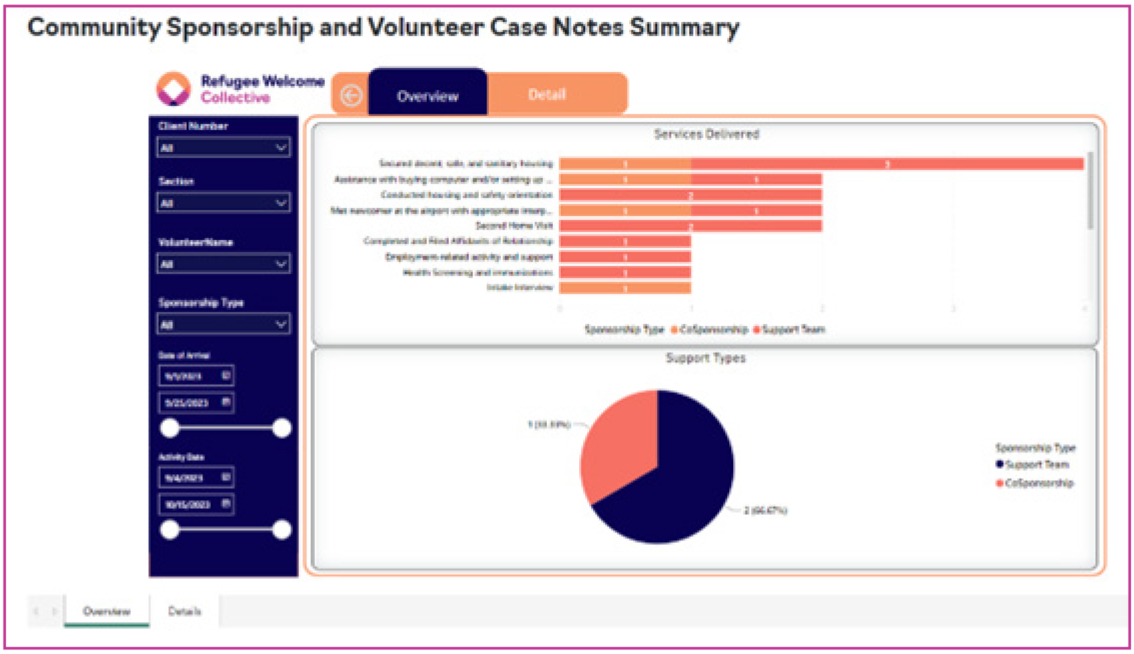


Click on **Export Data** to export the data. You can toggle the other options for further desired actions.

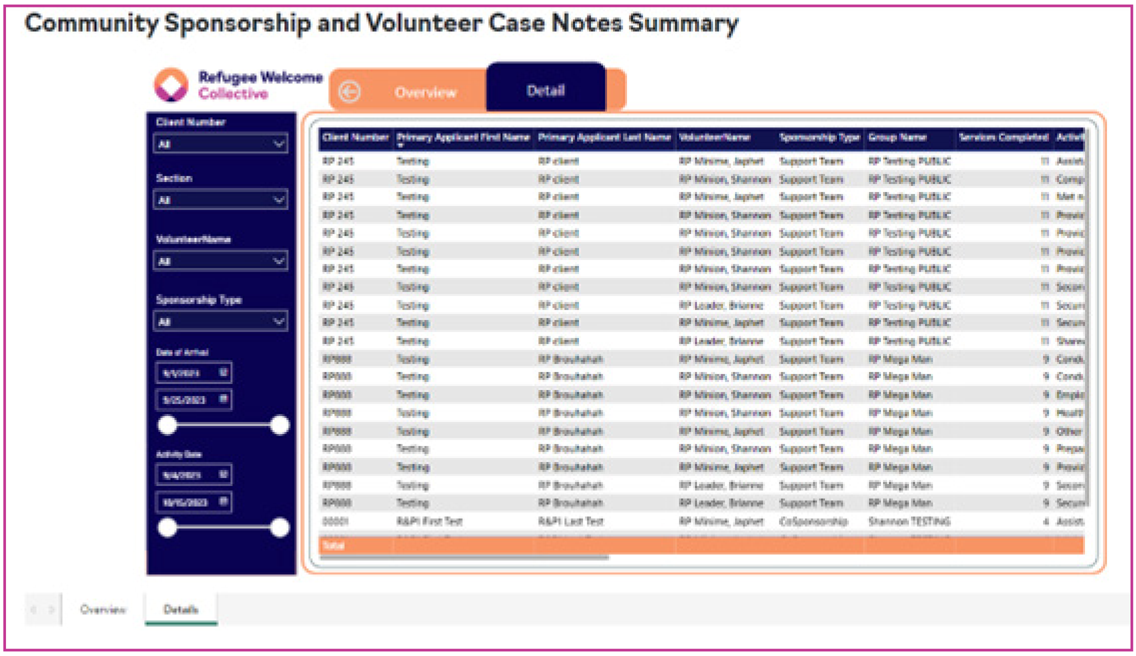
Community Sponsorship and Volunteer Case Notes Summary

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.

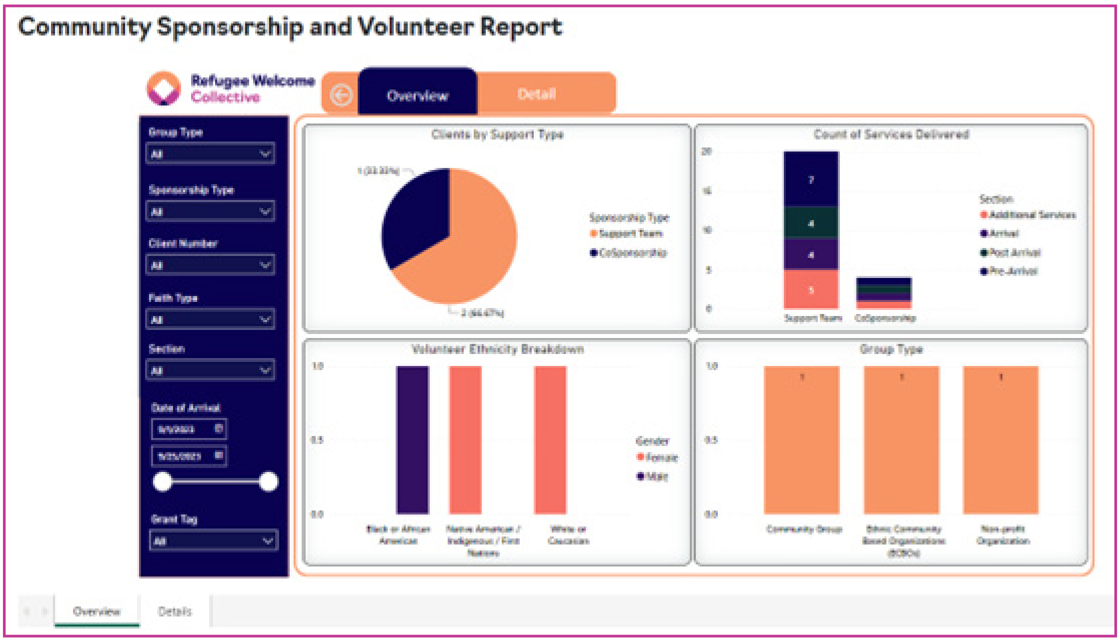


Scroll to the right and find case notes for each activity.

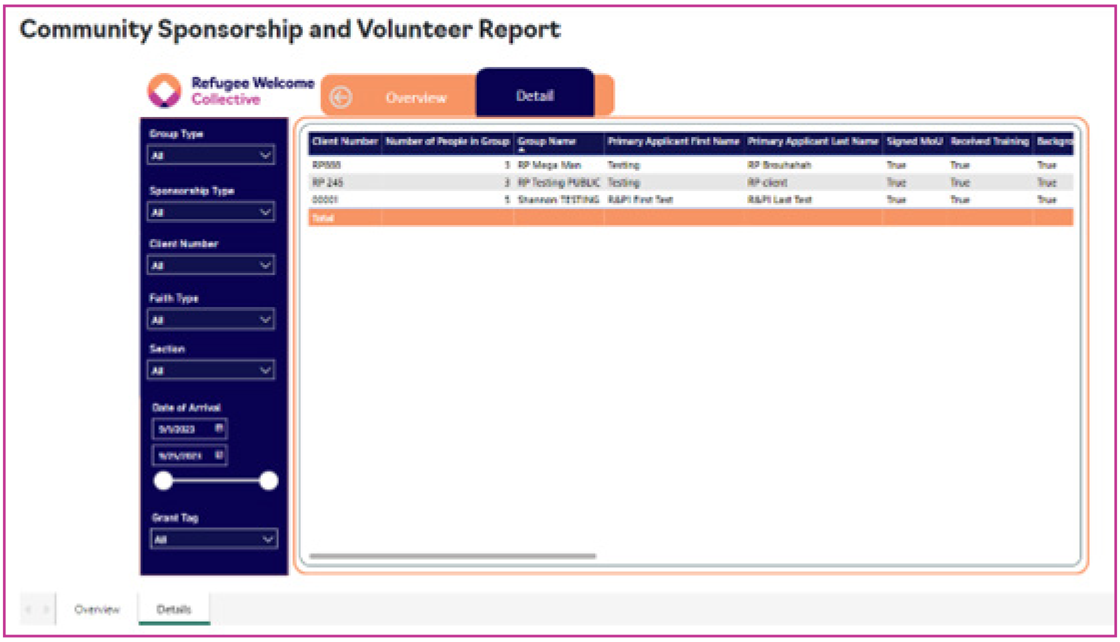
Community Sponsorship and Volunteer Report

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.



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.

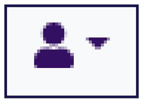
In **Engagement**, the local office user will be able to see info on immigration story, language, and welcome story.

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

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.