

**WELCOMECORPS**

# **WelcomeWorks Manual**



## **Private Sponsorship Groups (PSGs)**



**Refugee Welcome  
Collective**



## **WelcomeWorks**

# **Manual for Private Sponsorship Groups**

WelcomeWorks, formerly called the Refugee Welcome Collective (RWC) App, provides a user-friendly tool for Private Sponsorship Organizations (PSOs) and Private Sponsorship Groups (PSGs) to track and document service delivery and activities. These service delivery and activities include services delivered, PSG hours provided, financial contributions, in-kind donations, mileage provided, use of interpretation, and taking notes on key activities to help with reporting. Additionally, it helps organizations collect and track data showing the contributions and impact of the Welcome Corps program. This manual is designed to be used by PSGs.

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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.

## How to Use WelcomeWorks

1. When a PSG's information is entered by the PSO, the PSG 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 to set up a profile.*
2. When a PSG sets up a profile, they have access to a list of activities to complete, the timeline by which to complete those activities, how to record the activity provided, including when it was completed, the time the activity took, if transport or interpretation was provided, and a place to document information about the activity.
3. A PSG can view the progress of their group.
4. Reports are available for PSG and PSO users to provide full and comprehensive information about the impact of their PSGs in the Welcome Corps program.



## Welcome, Invitation, and Signing In

5

You should have received an email invitation to join WelcomeWorks after your PSO has matched you with a refugee newcomer.

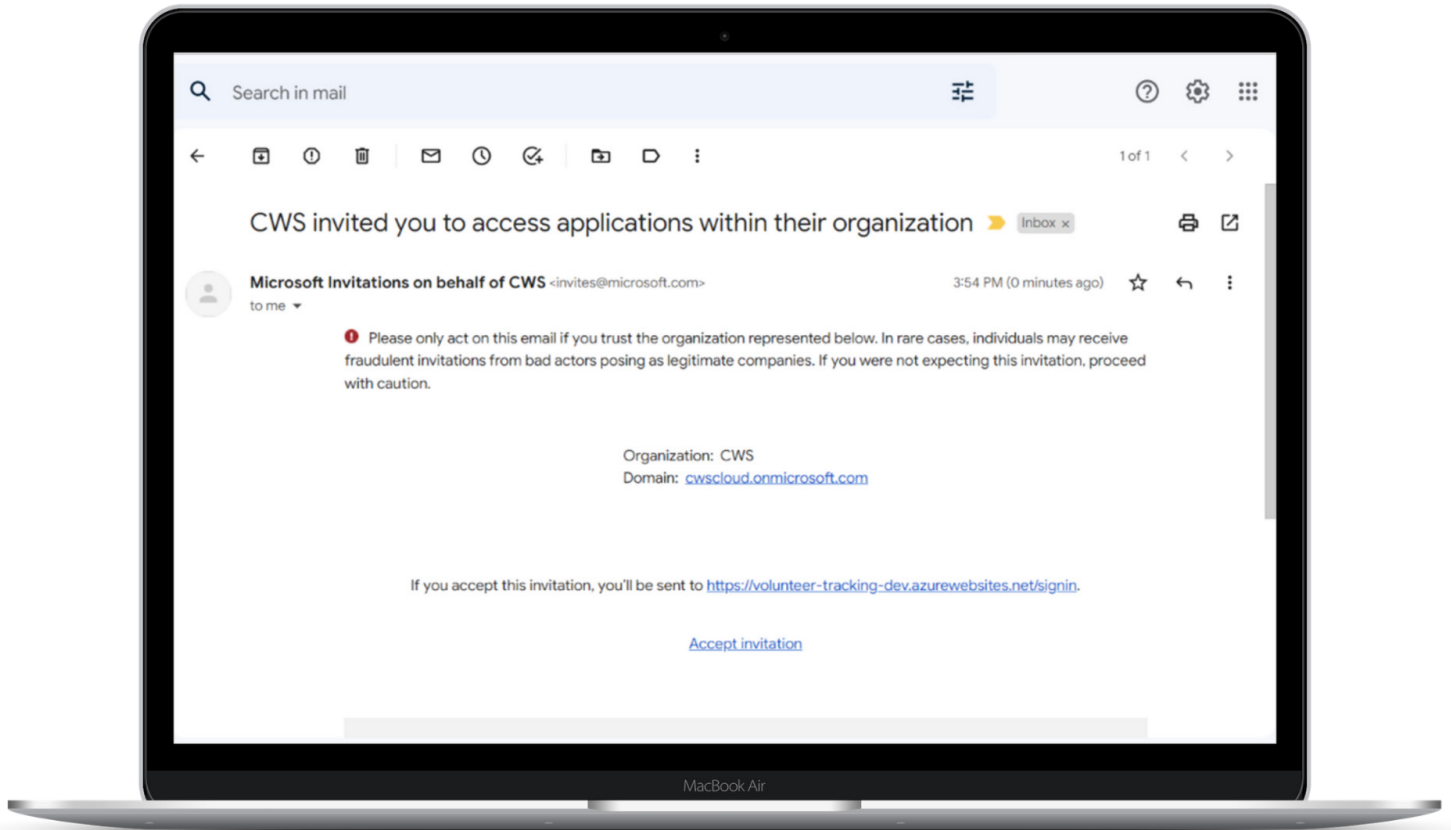


Fig. 1

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 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.



## Signing In

Once the PSG has been matched with a refugee newcomer, all members registered with the PSG will receive an email invitation. Once the PSG members have accepted the invitation, they will log in to WelcomeWorks to begin documenting their welcome activities. The PSG landing page would look like the image below.



Fig. 2

The landing page will show the first and last names of the refugee newcomer(s) assigned to your PSG, the refugee newcomer(s)'s status, and two buttons: **Add an Activity** and **View Activities**.



# Adding Activities

## Step 1

Click on **Add an Activity** to add any activity you have provided to the refugee newcomer. Once you have clicked that tab, you will be active on tab #1: **Client Information**.

The screenshot shows the 'Community Sponsorship Activity Entry' form. At the top, there are five tabs: 1 Client Information (highlighted in orange), 2 Service Activity, 3 Case Notes, 4 Donations, and 5 Review. Below the tabs, the form displays 'Today's Date' as 9/21/2023 and a question 'Which client is this service provided to?'. There are two input fields for 'PSG Client First Name' and 'PSG Client Last Name'. A 'Next' button is located at the bottom center of the form.

Fig. 3

Click **Next** to continue. Note that each tab you are on will be colored orange to show that you are active on the tab.

## Step 2

You are now on tab #2: **Service Activity**.

The screenshot shows the 'Community Sponsorship Activity Entry' form with the 'Service Activity' tab selected and highlighted in orange. A red error message states 'You must select at least one activity'. Below this, there is a dropdown menu for 'Which activity/activities did you complete?' with four options: 'Pre-Arrival', 'Day of Arrival', 'Weeks 1-4', and 'Weeks 5-12'. At the bottom of the form, there are 'Previous' and 'Next' buttons.

Fig. 4

Proceed to select the section (Pre-Arrival, Day of Arrival, Weeks 1-4, or Weeks 5-12) when the activity was completed. Core services for each section will be available to choose from. For example, if you want to complete an activity in the Day of Arrival section, click on **Day of Arrival**.



# Adding Activities

Check the core service that was completed and click **Next**.

The screenshot shows the 'Community Sponsorship Activity Entry' form at the 'Service Activity' step. The navigation bar at the top has five tabs: 1 Client Information, 2 Service Activity (highlighted in orange), 3 Case Notes, 4 Donations, and 5 Review. Below the tabs is a text input field with the placeholder 'Which activity/activities did you complete?'. The main content area is divided into sections: 'Pre-Arrival' with a dropdown arrow, 'Day of Arrival' with a dropdown arrow, and a section titled 'Please select all activities that were completed'. Under this section, there are three checkboxes: 'Airport pick-up: Welcome refugee newcomers at the airport and transport to housing. Bring appropriate seasonal clothing, a child's car seat, and an interpreter as needed.' (checked), 'Arrival meal: Provide ready-to-eat culturally appropriate meal.' (unchecked), and 'Arrival, home and personal safety orientation: Introduce basic fire safety, smoke detectors, door and window locks, thermostat, 911, information about appliances and bathroom facilities, and emergency contact information.' (unchecked). Below these are two more sections: 'Weeks 1-4' and 'Weeks 5-12', each with a dropdown arrow. At the bottom are 'Previous' and 'Next' buttons.

Fig. 5

## Step 3

You are on tab #3: **Case Notes**.

**Note:** Case notes are the record of key activities you performed to the refugee newcomer in your welcoming work.

The screenshot shows the 'Community Sponsorship Activity Entry' form at the 'Case Notes' step. The navigation bar at the top has five tabs: 1 Client Information, 2 Service Activity, 3 Case Notes (highlighted in orange), 4 Donations, and 5 Review. Below the tabs is a section titled 'Airport pick-up: Welcome refugee newcomers at the airport and transport to housing. Bring appropriate seasonal clothing, a child's car seat, and an interpreter as needed.' with a dropdown arrow. Underneath is a 'Case Notes Documentation' text area. Below that are two questions: 'Was interpretation used?' with radio buttons for 'No' (selected) and 'Yes', and 'Was an in-kind donation made?' with radio buttons for 'Yes' and 'No' (selected). Below these are two more questions: 'Do you need to report mileage?' with radio buttons for 'Yes' and 'No' (selected). At the bottom are 'Previous' and 'Next' buttons. There are also input fields for 'Time spent on activity/activities' (Hours and Minutes) and 'Date Activity Was Completed' (mm/dd/yyyy), with red error messages 'Required' and 'Invalid Date' below them.

Fig. 6

Complete the section appropriately. Note that if you select **Yes** on any of the questions, an additional section will open for you to complete.





## Adding Activities

### Step 4

You are now on tab 4: **Donations**.

The screenshot shows a web form titled "Community Sponsorship Activity Entry". At the top, there is a progress bar with five numbered tabs: 1 Client Information, 2 Service Activity, 3 Case Notes, 4 Donations (highlighted in orange), and 5 Review. Below the tabs, the question "Was a financial donation made?" is displayed with two radio button options: "Yes" and "No". The "No" option is selected. Below this question is a text area with the label "Optional: Please add additional information about this donation." At the bottom of the form, there are two buttons: "Previous" and "Next".

Fig. 7

If any financial donation was made during the performance of the activity, click **Yes**. If no financial donation was made during the performance of the activity, click **No**. You can also provide additional information about the donation if you have one in the space provided.

When you have completed this section, click **Next**.



# Adding Activities

## Step 5

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

Community Sponsorship Activity Entry

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

Client Information

Today's Date  
9/21/2023

Which client is this service provided to?  
PSG Client First Name PSG Client Last Name

Time Spent On Activity/Activities: 1.5 hours

Service Activity

Donations

Was a financial donation made?  
 Yes  No

Optional: Please add additional information about this donation.

Previous Submit

Fig. 8

If all entries are completed appropriately, you will be able to submit them. If not, your **Submit** button will not be shown and the tab where corrections need to be made will be flagged (see image below).



## Adding Activities

Click the **Previous** button to go to the tab where an error was made. In the image above, it is the **Case Notes** tab. Once you have corrected the error, click **Next** till you get to the **Review** tab.

Community Sponsorship Activity Entry

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

**Client Information**  
Today's Date  
9/21/2023  
Which client is this service provided to?  
PSG Client First Name PSG Client Last Name  
Time Spent On Activity/Activities: 1 hours

**Service Activity**

**Donations**  
Was a financial donation made?  
 Yes  No  
Optional: Please add additional information about this donation.

Previous

Fig.9

By now, your **Submit** button should be active for you to submit (see image above).

Nice job! You have successfully added an activity to the refugee newcomer.



## View or Edit Activity and Group Progress

After you have added the activity to the refugee newcomer, your page will look like the image below.



Fig. 10

In this view, you can either add more activities or view the activities you have provided to this refugee newcomer. If you intend to add more activity, repeat the process you just went through.

To view activities, click on **View Activities**. The image below will be your new page view.



Fig. 11

In this view, you can either edit an activity or view an activity. If you choose to edit an activity, click on the **Edit Activity** button to begin the edit. Editing an activity is similar to adding a new activity. Go through carefully to edit wherever you want.

To view an activity, click on the **View Activity** button. Your view will look like the image below.

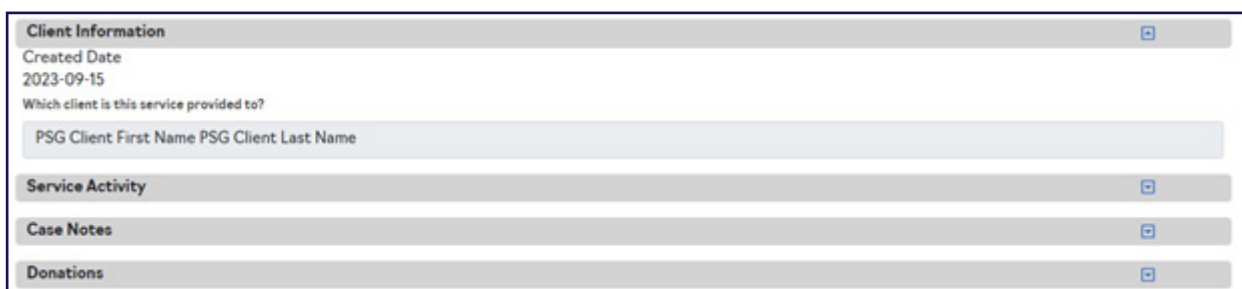


Fig. 12



## View or Edit Activity and Group Progress

To expand the activity, click on **Service Activity**, **Case Notes**, or **Donations** to see the details of the activity.

You can also see the PSG's progress by clicking on the **Group Progress** button on the right of your screen. An example of group progress is shown below.

Client: Jose Arrival Activities [View Activities](#)

### GROUP PROGRESS

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

- Provided seasonally appropriate clothes for work/school/every day use  
Completed By: Brianne Testing on 2023-09-05
- Provided food or food allowance for hot, culturally appropriate meal  
Completed By: Brianne Testing on 2023-09-01
- Secured decent, safe, and sanitary housing  
Completed By: Brianne Testing on 2023-08-01
- Provided furniture and household items  
Completed By: Brianne Testing on 2023-09-01
- Health Screening and immunizations  
Completed By: TestPSGNEW TestPSGNEW on 2023-08-30
- Met newcomer at the airport with appropriate interpretation  
Completed By: TestPSGNEW TestPSGNEW on 2023-08-30
- Provided furniture and household items  
Completed By: TestPSGNEW TestPSGNEW on 2023-08-24

Fig. 13



## Group Leader Report

The **Group Leader Report** can be accessed by the PSG leader. To access this report, click **Reports** at the top of the screen.



Fig. 14

After navigating to **Reports**, click **Group Leader Report**.

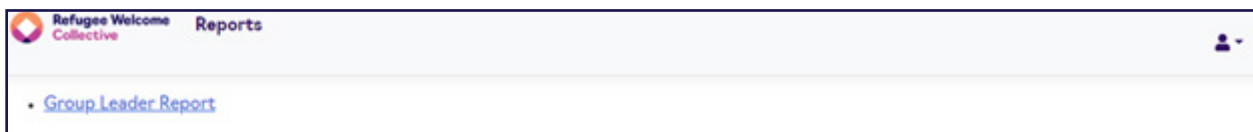


Fig. 15

The Group Leader Report provides information on the number of activities performed by each PSG member. This report is available in both **Overview** and **Details** views. The Overview presents the report in a bar chart while the Details presents the raw data of activities provided: PSG name, PSG member who completed the activity, their email address, the activity completed, date of activity, financial donation amount (if any), etc.



## Group Leader Report: The Overview

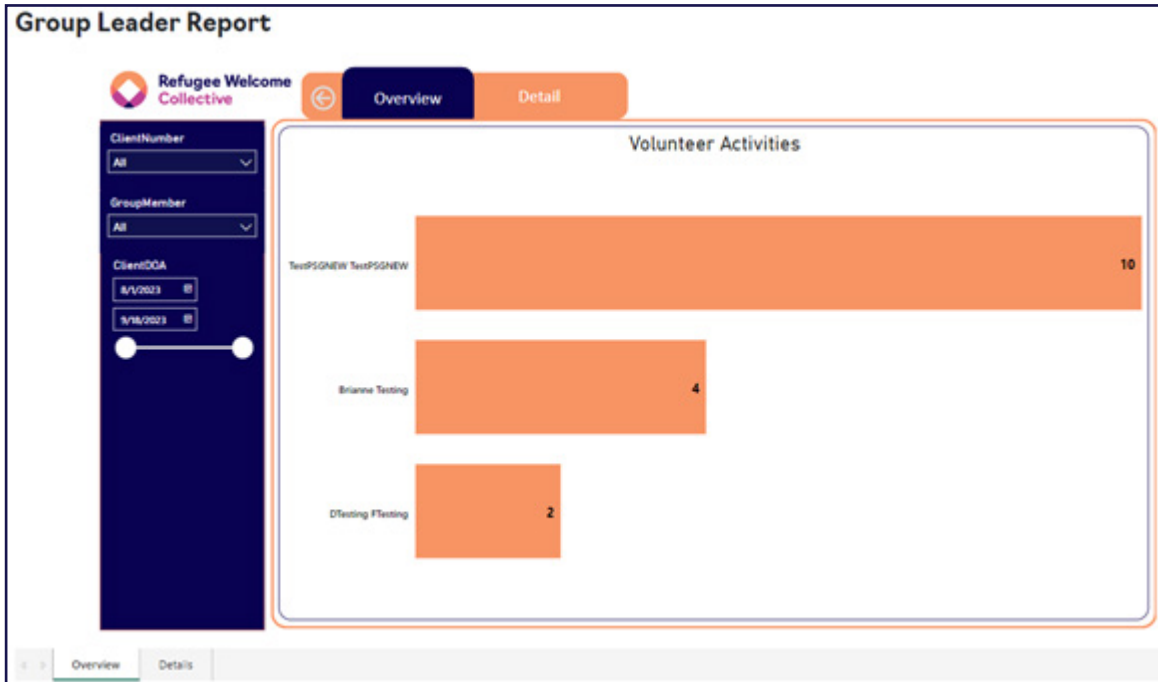


Fig. 16

## Group Leader Report: The Details

The screenshot shows the 'Details' tab of the Group Leader Report. The left sidebar filters are the same as in the overview. The main area displays a table with the following columns: SponsorGroupName, GroupMember, VolunteerEmail, PrimaryContactFirstName, PrimaryContactLastName, ClientNumber, and Total Group.

SponsorGroupName	GroupMember	VolunteerEmail	PrimaryContactFirstName	PrimaryContactLastName	ClientNumber	Total Group
Friendly Faith Community	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Jose	Arrival	HS-22000	
First PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Test PSG John	Test PSG Doe	1234	
First PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Test PSG John	Test PSG Doe	1234	
Friendly Faith Community	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Jose	Arrival	HS-22000	
Friendly Faith Community	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Jose	Arrival	HS-22000	
First PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Test PSG John	Test PSG Doe	1234	
Friendly Faith Community	Brianna Testing	RWC_APP_TEST6@cwstest.us	Jose	Arrival	HS-22000	
First PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	Test PSG John	Test PSG Doe	1234	
OUR PSG	DTesting FTesting	derek.shakenstep@gmail.com	PSG Client First Name	PSG Client Last Name	111	
Friendly Faith Community	Brianna Testing	RWC_APP_TEST6@cwstest.us	Jose	Arrival	HS-22000	
Friendly Faith Community	Brianna Testing	RWC_APP_TEST6@cwstest.us	Jose	Arrival	HS-22000	
Friendly Faith Community	Brianna Testing	RWC_APP_TEST6@cwstest.us	Jose	Arrival	HS-22000	
OUR PSG	DTesting FTesting	derek.shakenstep@gmail.com	PSG Client First Name	PSG Client Last Name	111	
OUR PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	PSG Client First Name	PSG Client Last Name	111	
OUR PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	PSG Client First Name	PSG Client Last Name	111	
OUR PSG	TestPSGNEW TestPSGNEW	RWC_app_test3@cwstest.us	PSG Client First Name	PSG Client Last Name	111	
<b>Total</b>						

Fig. 17



This report is filterable by **Client Number** (refugee newcomer number), **Group Member**, and **Client Date of Arrival (DOA)** (refugee newcomer DOA), and can also be exported as a spreadsheet.

To export case notes to a spreadsheet, move your cursor to the top-right of the report, and hover your mouse over that spot until you see three dots **...** for more options. Click on the three dots to see the options shown below.

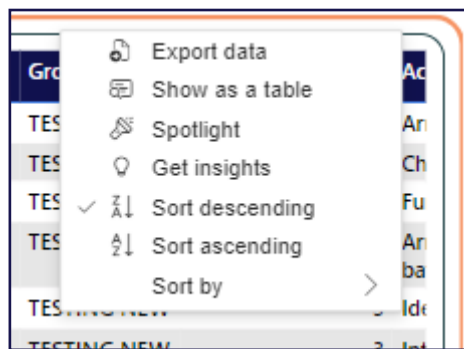


Fig. 18

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



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.



Fig. 39

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](mailto:welcomeworks@cwsglobal.org).



The table below lists some WelcomeWorks terms and their Welcome Corps equivalents.

WelcomeWorks Terms		Welcome Corps Terms
<b>General</b>		
Client	→	Refugee Newcomer
Client Information	→	Refugee Newcomer Information
Client Number	→	Refugee Newcomer Number
Local Office	→	PSO
Client DOA	→	Refugee Newcomer's Date of Arrival
Volunteers	→	N/A
Sponsorship Group	→	PSG
Community Sponsorship Group Volunteers	→	PSG Members
Grant Tag	→	Other
Enter Grant Tag	→	Welcome Corps (WC)
Additional Volunteers	→	N/A
Wrap-around Services	→	N/A
Core Services	→	Services Performed by PSGs
Case Notes	→	Activity Notes
<b>Reports</b>		
Community Sponsorship and Volunteer Case Notes Summary	→	Community Sponsorship and PSG Activities Summary
Community Sponsorship and Volunteer Case Report	→	Community Sponsorship and PSG Report
Outreach Stats Local Office	→	Outreach Stats PSO
Outreach Stats by Volunteer Local Office	→	Outreach Stats by PSG or PSO

## **Need help?**

Contact [info@refugeewelcome.org](mailto:info@refugeewelcome.org)  
with questions and suggestions.

The Welcome Corps is a program of the U.S. Department of State,  
administered by a consortium led by the Community Sponsorship Hub  
with funding provided by the U.S. government.