June 25, 2017

This memorandum serves as a revision update for the collaboration between ORAM and The University of California, Berkeley on ORAM’s integrated online referral and registration system “Application for ORAM Assistance (AOA).” The comments below should be incorporated into the AOA database. Feedback from Berkley should be directed to Jamie Charnock, [jcharnock@oraminternational.org](mailto:jcharnock@oraminternational.org), with Christina Peña, [cpena@oraminternational.org](mailto:cpena@oraminternational.org).

Application Link:<http://oram-portal.herokuapp.com/>

email: [testadmin@email.com](mailto:testadmin@email.com)

password: cs169f16

There is also an admin sign up link:

<http://oram-portal.herokuapp.com/admins/sign_up>

There is also a project tracker here which will help you:

<https://www.pivotaltracker.com/n/projects/1886663>

**ORAM INTEGRATED ONLINE REFERRAL & REGISTRATION SYSTEM**

**SYSTEM SPECIFICATIONS**

*A fully integrated secure system accessible to authorized stakeholders allowing referral and handling of refugee clients for assistance, protection and resettlement.*

**Summary of the Process**

Applicants for ORAM Assistance (AOA) must be referred to ORAM by a pre-vetted, trained outside party or by an ORAM staff or board member Referrer who can vouch for the Applicant and attest to his/her group membership.

The process thus begins with the party termed “Referrer.” It ends with case processing through resettlement. The major steps are summarized in the narrative below and laid out in more detail in the index to Phases and Steps following it. (To be further fleshed out.) User Interface Language Options: English, Arabic, Farsi (Persian). ORAM administrator and caseworkers/back end language: English. At each Phase, video instructions in English, Arabic and Farsi explain to external users in simple terms what will occur and what will be required of client at this step. The major steps of the process are narrated in the paragraphs below:

A pre-vetted Referrer receives a web link from ORAM which allows him/her to sign into the system. S/he then creates a Referrer profile. The Referrer is then enabled to refer applicants for assistance to ORAM. The Referred Applicant is then invited by the ORAM administrator to complete an initial questionnaire. Upon review and approval of this questionnaire, s/he is vetted (interviewed) in person by a qualified ORAM staff person. Upon being successfully vetted, the Applicant becomes a “Prospective Client.” S/he is then sent system-generated attorney-client documents which s/he must complete and sign within 30 days. Once the signed documents are received and accepted by ORAM, the Prospective Client becomes a “Client.” A new Client is sent a system-generated Case Information “Intake Packet” which s/he completes. S/he is also prompted to upload and submit scanned documents as requested by the system. ORAM staff review this packet and the submitted documents. The standardized information (in clicked answers and drop-down fields) automatically appears to ORAM in English. Text answers submitted in whole or in part in Arabic or Farsi are translated manually into English.

If the ORAM staff person deems the information submitted complete (or sufficient to progress with the case), the case is assigned to a caseworker, who works on the case to completion. The case documents are then submitted to UNHCR, and the case is tracked to decision. Lastly, the client is tracked through referral for resettlement and resettlement.

Throughout the process, filings, case developments, document uploads, and calendared dates and deadlines are communicated to designated parties via automatically-generated pre-written standard e-mail messages in English, Arabic or Farsi.

**Progress Phases & Steps**

**(red = completed; orange = needs revision; green = needs to be completed)**

**Permissions**

ORAM Administrator: Management-level and authorized to see all information.

ORAM case staff: interns/students or other staff: Authorized to see/work only on authorized cases.

**Phase I: Referrer Vetting**

Step 1: Permission to Referrer prompts opening of Referrer Profile

(link sent by ORAM administrator)

Step 2: Referrer completes personal profile (Online by Referrer)

Step 3: Referrer profile is accepted or rejected (by ORAM administrator

(technical check if all info is correct and complete.)

Step 4: In case of incomplete information, Referrer is notified of missing/incomplete information. In case of acceptance, proceed to Phase II

**Phase II: Referral of Applicant for ORAM Assistance (online)**

Step 1: Referrer completes & submits Applicant information (Online by Referrer)

Step 2: ORAM reviews Referrer’s Applicant Information (by ORAM administrator)

Step 3: ORAM accepts or rejects Applicant for Vetting (ORAM administrator)

Step 4: In case of rejection, applicant and referrer are notified. In case of acceptance, proceed to Phase III

**Phase III: Applicant Vetting**

Step 1: Applicant is sent link to online Initial Questionnaire (by system)

Step 2: Applicant completes Initial Questionnaire (online)

Step 3: ORAM reviews Applicant questionnaire (administrator)

Step 4: If applicant is rejected, system relays email notification. If applicant is accepted, applicant is scheduled for in-person field (eligibility) interview (administrator)

Step 6: Eligibility Interview is conducted.

Step 7: If applicant is rejected, system relays email notification. If applicant is accepted, Proceed to Phase IV.

**Phase IV: Representative-Client Relationship**

Step 1: System generates Attorney-Client Documents (online by ORAM administrator & Prospective Client). Signing must take place within 30 days. In case the client does not return signed documents, case is closed and client is notified of same).

Step 2: ORAM administrator reviews Prospective Client Documents. In case of deficiency, Prospective Client is notified (online). If accepted, proceed to Phase V.

**Phase V: Casework**

Step 1: Client is sent Case Information “Intake Packet” (online)

Step 2: Client completes intake packet

Step 3: Client is requested to submit required documents (by system)

Step 4: Client uploads documents requested (online)

Step 5: Case is assigned to ORAM Case worker (in-person & online)

Step 6: Client is notified of and e-troduced to case worker

Step 7: Case worker prepares case.

**Phase VI: Submission & Tracking**

Step 1: Case is submitted to UNHCR (by ORAM administrator online)

Step 2: ORAM calendars estimated UNHCR registration date

Step 3: UNHCR notifies client or ORAM of actual registration date

Step 4: ORAM calendars prospective UNHCR Interview Date

Step 5: UNHCR notifies client or ORAM of actual interview date

Step 6: ORAM or Client reports Interview Results (Client or ORAM)

Step 7: If case is rejected, refer client to appeal agencies.

If case is granted/recognized, proceed to Phase VII.

**Phase VII: Resettlement**

Step 1: Resettlement Interview date by Foreign Gov’t (by Client or ORAM) Automated notice after date to put info in the system.

Step 2: Resettlement Interview results by Foreign Gov’t (by Client or ORAM) Automated notice after date to put info in the system.

**Current State of Project**

In 2016 CS169 students made strides to build the platform specified in the above guidance, completing Phases I, II and III. We have carefully reviewed the created platform, and have added some additional comments on what we would like to change to improve the user use. Currently, the ORAM Administrator can invite Referrers and Clients to the platform – invitations are sent via email directly to the addressee. Once invited, Referrers may fill in the Referrer Questionnaire detailing their personal details, which will be reviewed by the administrator. The administrator is able to approve or reject the Referrer, or state the application ‘incomplete’. If accepted, the Referrer is then able to refer clients, who are invited via email and fill out a Client Intake Questionnaire – which is then reviewed by the administrator, before they are approved/ rejected or have their application marked as incomplete. Clients can also upload files to the platform.

**Issues with the Current Platform:**

**General and Admin:**

1. The admin signup link is broken – We will require multiple admins, but instead of having a sign up link for admins, it would be safer to be able to invite admins from the admin interface within the platform. There should be two levels of ORAM Admins:
   1. Central Admin – Has access to all information (Referrers, Clients)
   2. ORAM Employee Admin – Has access to the cases assigned to them by the central admin. These employees should be invited to the platform by the central admin, and their profile tied to cases they are working on. The central admin may add/remove cases tied to their account.
2. There is no way that users can edit their profiles - This should be in a settings tab, which will allow users to edit their: **Name, Address, Phone Number, Email Address, Skype Account Details and their Password**. In this tab there should also be an option “Withdraw from ORAM Assistance” (Client Interface only), or “Withdraw as an ORAM Referrer” (Referrer Interface only).
3. There is no way that Admins can delete/edit users.
4. When Admins are referring clients/referrers, they are not required to specify the account type (referrer/client). If they do not specify any account type, they are able to access the platform but all they can do is access the website. Please ensure that admin can’t invite users unless they specify an account type.
5. If a user forgets their password, they are redirected to change their password, but when they click the Submit button to submit their new password nothing happens – please correct.
6. Documents can only be uploaded in PDF format. Please ensure all popular image formats can be uploaded.
7. Admins are unable to view the images/documents uploaded to the platform – please tie these to the questionnaires of the clients & referrers.
8. When Referrers and Clients are invited to the platform, they are not brought straight to their respective questionnaire page – please correct this.

**Correspondence:**

1. There should be a “Message ORAM” tab on all interfaces which allows Referrers and Clients to message admin users. These messages should be forwarded to all admin accounts.
2. During the processing of filling the Referrer and Client Questionnaires, there should be a “Message ORAM” button to allow Referrers and Clients to message admin users. These messages should be forwarded to all admin accounts.
3. This interface should automatically send out the following emails:

**\*Jamie will draft these emails for you next week\***

* 1. Phase I, Step 1: Email to Referrer
  2. Phase I, Step 2: Email to Central Admin
  3. Phase I, Step 3 and 4: Email to Referrer
  4. Phase II, Step 1: Email to Central Admin
  5. Phase II, Step 3 and 4: Email to Referrer
  6. Phase III, Step 1: Email to Applicant
  7. Phase III, Step 3 and 4: Email to Central Admin
  8. Phase III: Step 7: Email to Client

**Next Steps**

Following the resolution of the above points, you will begin to work on creating the case management section on the platform (detailed in the steps below). This platform will allow ORAM staff members to manage case work completely online, and will require:

1. To generate forms by adding personal data submitted in the client questionnaire into templates provided by ORAM.
2. A case tracking feed should be created in the home page of Referrer accounts. This should only track the status of cases that they have referred, and be limited to the Phase that the client is on (Phase I: Applicant Vetting, Phase II: ORAM Preparing Client Case”, Phase III: Case Submitted, Phase IV: UNHCR Interview Completed, Phase V: Recognized Refugee **or** Case rejected by UNHCR, Phase VI: Referred for Resettlement **or** Appeal, Phase VII: Resettled **or** Case Closed**)**
3. A case tracking feed should also appear in the homepage of the central admin, detailing the status of all referrers (approved/not) and all prospective and approved clients. For approved clients, this should indicate the phase that the client is on, as detailed above.
4. For each of the ORAM Employee admins, a case tracking feed should also appear in the homepage detailing the status of all cases that they are linked to. This should indicate the phase that the client is on (as detailed above).
5. Currently, as an admin when you view the clients you can see answers to their client questionnaire. We would like a text box (with an unlimited text allowance) which will allow case notes to be added. Any added text should be linked to the user who added it (ie. ORAM employee or Central Admin).

**Further details of the specifics of these steps will be fleshed out over the coming two weeks.**

**Phase IV: Representative-Client Relationship**

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