



Closing a Program in IRMA

Below is a brief overview of how to close a program in IRMA, IOR's proprietary consultant database. IRMA allows you to manage and update your profile directly so that IOR's Destination Program Managers (DPMs) can work with you on your authorized programs. The only information on your profile that may be shared with our clients is your name, bio, photo, and contact details. For more information on IRMA, including getting paid and FAQ's, please check out the DSC Portal, which you can access by navigating to the [IOR website](#) and clicking the "Login" button in the upper righthand corner.

Login: iords

Password: procedures

Login for California DSCs: iordsca

Password for California DSCs: proceduresca

The DS Portal also houses documents, google earth tours, and more to help you with our programs.

Closing a Program

Below are considerations impacting program closure:

- If your program is authorized for four (4) days or more, you may submit an interim invoice of 25% of program rate to your DPM for processing, after your first face-to-face meeting with the Assignee
- Close your program within five (5) days of program completion or you will not be paid
- Payment is 30 days following DPM review of your program closure in IRMA
- If your program time was less than or greater than originally authorized, confirm your actual hours with your DPM to determine final payment. Actual program hours should also be listed in the survey at the end of the closing process. The DPM will make the necessary adjustment in our proprietary system

When you are ready to close out a program, log into IRMA to view your open programs. Click "View" next to the program you are ready to close and proceed with the following steps on each of the tabs.

Expenses Tab

The line items appearing under this tab include the services approved in your Program Confirmation, such as Area Tour, Home Finding, Settling In, and School Search. When a Welcome Packet is authorized, this appears as a separate item for payment. Receipts are not required for Welcome Packets, but should be retained for business / tax purposes, as applicable. No other expenses are covered in a standard program. If there is an exception, this must be preapproved by your DPM. Receipts may be required for reimbursement. Scanned or emailed receipts are acceptable.

Supporting Documents

Upload your final document(s) by clicking “[Choose File](#)” and then select the “[Type of Document](#)” in the drop-down menu. Click “[Save and Submit to IOR](#)” for each document:

- Signed Lease (if a home finding program)
- Lease Summary
- Signed Property Inventory (if unable to use DS App)
- Any client documents / reports (RMC required docs, etc.)

Finish Program

Click “[Start Survey](#)” and complete the questions. Clarification on time is as follows:

- Face-to-Face includes actual time spent with the assignee and telephone time directly with the assignee. It also includes time spent acting on the assignee’s behalf (setting up utilities, receiving rental furniture, completing the move-in inventory, etc.)
- Research Time includes time spent researching for the assignee, making phone calls, collecting materials, setting up appointments, and more. 20-25% of allotted hours is a reasonable expectation of research time but please check with your DPM if an RMC’s agreement is slightly different

When ready, check the “[I agree, my program is complete](#)” box and then click “[Save and Submit to IOR](#)”. Then, wait until it is confirmed that it has been saved.

Closing Email – Thank You Template

Dear ([Assignee and Partner](#)),

We have now accomplished your authorized destination services in ([city/area](#)). As my services are now complete, it is IOR’s hope that you feel completely satisfied.

You may receive a service evaluation that references the many service providers who assisted you with your relocation. Please remember that I provided you with Destination Services specifically. I hope you will be able to give me the highest rating for my specific services delivered.

Please let me know if there are any remaining tasks that you require. Although I won’t be contacting you regularly as your Destination Services Consultant, I’m only an email or phone call away if you have any questions or concerns as you continue adjusting to your new surroundings.

It was a pleasure working with you, ([Assignee](#)). I wish you the best on your new assignment!

Kind Regards,
([Signature Line](#))