



## Sample Comprehensive Case Management Onboarding Guide

At the heart of federally funded programs for refugees and newcomers is one core function: **case management, the coordination of services and support of clients that ultimately facilitates newcomers' wellness and autonomy.** Case managers help facilitate individual-level change for clients by assessing client needs, strengths, and challenges to work with the client towards their goals and wellness. They meet with clients regularly and connect clients with appropriate external providers and other resources as needed. Case management includes rapport-building, goal setting, collaborating, and coordinating with other key individuals in clients' lives and communities, and ultimately preparing for the termination of services. Case managers and agencies also meet these goals by referring clients to other community and local services, thereby helping clients integrate better into where they live. The goal of case managers should be to provide safe, effective, client-centered, timely, efficient, accessible, and equitable services for all clients.

This **Comprehensive Case Management Onboarding Guide** is a framework for onboarding new staff members who will provide case management services in the context of refugee service delivery. It is meant to be customized to include training specific to your organization, including any in-house requirements, as well as specific focus areas for the programs and populations your agency serves. This guide shares reading materials, recorded webinars, and other resources to complement your organization or program's onboarding activities, which may include training from supervisors, shadowing colleagues, reviewing procedural materials and organization policies, and case consultations and/or case conferences. To provide new employees with a comprehensive manual, it can be well-complemented by the guide [Comprehensive Case Management for Working with Newcomers in the U.S.](#) Switchboard also offers other specialized onboarding guides, including the [Sample Intensive Case Management Onboarding Guide](#).

Note: This onboarding guide includes external resources that may be unavailable. If you need access or updates, contact the original author.

### Learn More About Who You Serve

This first section provides you with an introduction to some of the Office of Refugee Resettlement (ORR)-eligible populations you may serve through your program.

Note: This is not a comprehensive list of ORR-eligible populations that may be enrolled in your agency's program. For a full list of eligibility documents for all eligible client populations, please refer to the [ORR website](#).

Due Date: Completion Date:	
<b>Immigration Statuses and ORR Eligibility</b>	<input type="checkbox"/> <b>Watch:</b> <a href="#">Understanding Newcomer Immigration Statuses</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">How Resettlement Agencies Work with the U.S. Government</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">An Overview of the Office of Refugee Resettlement</a> <input type="checkbox"/> <b>Review:</b> <a href="#">ORR Resettlement Programs for Refugees</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Getting Started in Navigating ORR Eligibility</a> <input type="checkbox"/> <b>Read:</b> <a href="#">ACF Policy Index</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Status and Documentation Requirements</a>
<b>Refugees</b>	<input type="checkbox"/> <b>Watch:</b> <a href="#">Who are refugees and how do they arrive in the U.S.?</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Resettlement in the United States</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">What is refugee resettlement and what is UNHCR's role?</a>
<b>Cuban &amp; Haitian Entrants</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">ORR Fact Sheet for Cuban/Haitian Entrants</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Understanding Immigration Context and Eligibility for Cuban and Haitian Entrants</a>
<b>Certain Amerasians</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">ORR Fact Sheet for Amerasians</a>
<b>Victims of Trafficking</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">ORR Fact Sheet for Victims of Trafficking</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">Faces of Human Trafficking Series</a>
<b>Afghan and Ukrainian Humanitarian Parolees</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">Resource List: Serving Ukrainian Newcomers</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Useful Resources to Support Afghan Newcomers in the U.S.</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Answering FAQs on Benefits for Ukrainian and Afghan Humanitarian Parolees Arriving On or After October 1 2023</a>
<b>Special Immigrant Visa (SIV) Recipients</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">Special Immigrant Visa (SIV): Application Vetting Approval</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Special Immigrant Visas for Afghans</a>
<b>Unaccompanied Refugee Minors (URMs)</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">Unaccompanied Refugee Minors Program</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">Show Up for URMs with Resources, Responsiveness, and Readiness</a>

## Understanding Case Management

The following section introduces case management and establishes standards and expectations for staff working within case management. These values draw heavily from the field of social work. Although many refugee resettlement staff may not be

social workers, the services we provide are aligned with the standards found in the [National Association of Social Workers Code of Ethics](#).

Due Date:  
Completion Date:

<p><b>Ethics of Service Provision</b></p>	<p><input type="checkbox"/> <b>Read:</b> National Association of Social Workers <a href="#">Code of Ethics</a></p> <p><i>*Note that this Code of Ethics is meant for social workers and MSW students, but the ethics and practices are applicable to anyone who works with clients. You may find other codes of ethics for other professionals useful as well.</i></p>	<p><input type="checkbox"/> <i>Activity: Choose two principles that stood out to you and explain why.</i></p>
<p><b>Case Management Foundations</b></p>	<p><input type="checkbox"/> <b>Watch:</b> <a href="#">Case Management Foundations</a></p> <p><input type="checkbox"/> <b>Watch:</b> <a href="#">Practical Guide to Working With Refugees</a></p> <p><input type="checkbox"/> <b>Listen:</b> <a href="#">What is Motivational Interviewing?</a></p>	<p><input type="checkbox"/> <i>Reflect: What are some contextual and cultural factors you should consider as a case manager? What are some practical ways you can support clients' well-being?</i></p>
<p><b>Strengths-Based Approach</b></p>	<p><input type="checkbox"/> <b>Watch:</b> <a href="#">Demystifying Strengths-Based Services to Foster Refugees' Resilience</a></p> <p><input type="checkbox"/> <b>Read:</b> <a href="#">What is a Strength-Based Approach?</a></p>	<p><input type="checkbox"/> <i>Activity: Review a sample client intake and identify some of the client's strengths.</i></p> <p><input type="checkbox"/> <i>Activity: Review this <a href="#">Strengths-Based Approach</a> poster and hang it publicly, if appropriate, in your office.</i></p>
<p><b>Principles of Trauma-Informed Care</b></p>	<p><input type="checkbox"/> <b>Watch:</b> <a href="#">Trauma-Informed Care in Case Management</a> or <b>Read:</b> <a href="#">Trauma-Informed Care: A Primer for Refugee Service Providers</a></p> <p><input type="checkbox"/> <b>Watch:</b> <a href="#">De-escalation in Practice: Strategies for Supporting Newcomers Experiencing Crises</a> or <b>Read:</b> <a href="#">Preventing Crises and De-Escalating Difficult Situations with Newcomer Clients</a></p>	<p><input type="checkbox"/> <i>Reflect: What are the basics of trauma-informed care? Why is understanding trauma-informed care important to serving refugee clients? What are some examples of how you can implement trauma-informed care in your work?</i></p>

	<p><b>For Expanded Skill Building:</b></p> <p><input type="checkbox"/> <b>Read:</b> <a href="#">A Screening Guide for Resettlement Providers</a></p>	
<b>Defining Professional Case Management Boundaries</b>	<p><input type="checkbox"/> <b>Watch:</b> <a href="#">Creating Balance in Case Management</a></p> <p><input type="checkbox"/> <b>Watch:</b> <a href="#">Client Boundaries</a></p> <p><input type="checkbox"/> <b>Watch:</b> <a href="#">Boundaries in the Electronic Age</a></p> <p><input type="checkbox"/> <b>Read:</b> Internal agency policies on boundaries (check with supervisor)</p>	<p><input type="checkbox"/> <i>Discuss with your supervisor: What are some challenges you anticipate with setting client boundaries? How can your supervisor assist with these challenges?</i></p> <p><input type="checkbox"/> <i>Discuss with your supervisor: What internal policies does your organization have in place to develop and preserve boundaries?</i></p>
<b>Cultural Background Information</b>	<p><input type="checkbox"/> <b>Read:</b> Cultural Backgrounders for commonly served populations at your location (<a href="#">Afghan</a>, <a href="#">Afrikaner</a>, <a href="#">Bhutanese</a>, <a href="#">Burmese (Myanmar)</a>, <a href="#">Cuban</a>, <a href="#">Haitian</a>, <a href="#">Congolese</a>, <a href="#">Iraqi</a>, <a href="#">Rohingya</a>, and <a href="#">Ukrainian</a>)</p>	<p><input type="checkbox"/> <i>Reflect: Which cultural populations do you work with most closely? What do you need to know to best serve them?</i></p>

### Programs and Benefits for Clients

This section provides staff with information about ORR-funded and other federal programs available to newcomers.

Due Date:

Completion Date:

<b>Governmental Programs and Federal Assistance</b>	<p><input type="checkbox"/> <b>Read:</b> <a href="#">Public Benefits Overview for Refugees and Other Humanitarian Immigrants</a></p> <p><input type="checkbox"/> <b>Read:</b> <a href="#">Immigrants' Eligibility for U.S. Public Benefits: A Primer</a></p> <p><input type="checkbox"/> <b>Read:</b> <a href="#">Social Security Numbers for Noncitizens</a></p>	<p><input type="checkbox"/> <i>Reflect: Which programs are your clients eligible for? How might you interact with other government agencies or services to support your clients, including through referrals?</i></p>
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	<p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Supplemental Security Income (SSI): An Introduction for Service Providers</a> or <b>Read:</b> <a href="#">Supplemental Security Income (SSI): Answering Frequently Asked Questions for Service Providers</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">What You Should Know About the Free Application for Federal Student Aid (FAFSA) Updates</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Employment Authorization Documentation Reference Guide for Refugee Service Providers in the U.S.</a></li> </ul>	
<p><b>Office of Refugee Resettlement (ORR) Programs</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Eligibility for Matching Grant (MG) Flow Chart</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Preferred Communities (PC) Overview</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Cash and Medical Assistance (CMA) Overview</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Refugee Support Services (RSS) Overview</a></li> </ul> <p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Refugee Medical Screening</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Refugee Health Promotion (RHP) Overview</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Refugee School Impact (RSI) Overview</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Refugee Youth Mentoring (RYM) Overview</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">ORR Services to Older Refugees (SOR) Overview</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Identify the ORR program(s) within which you are working. What internal referrals to other ORR programs are available within your agency for your clients? For ORR-funded programs not available in-house at your organization, are there any local providers that accept referrals?</i></li> <li><input type="checkbox"/> <i>Activity: If possible, connect with staff at other resettlement agencies locally or in your state to understand their programming and referral procedures.</i></li> </ul>

	<input type="checkbox"/> <b>Read:</b> <a href="#">ORR Refugee Career Pathways Overview</a> <input type="checkbox"/> <b>Read:</b> <a href="#">ORR Services to Afghan Survivors Impacted by Combat (SASIC) Overview</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Unaccompanied Refugee Minors (URM) Overview</a> <input type="checkbox"/> <b>Read:</b> <a href="#">ORR Wilson-Fish TANF Coordination Overview</a> <input type="checkbox"/> <b>Read:</b> <a href="#">ORR Ethnic Community Self Help Overview</a>	
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<b>Case Management Skills and Competencies</b>		
This section provides staff with information needed to provide services to clients and manage a caseload.		
Due Date: Completion Date:		
<b>Intake &amp; Assessment</b>	<input type="checkbox"/> <b>Review:</b> Intake processes and required assessments with your supervisor or organization's training officer <input type="checkbox"/> <b>Observe:</b> Two assessments with clients	<input type="checkbox"/> <i>Activity: List the forms that are required to be completed during initial intake and assessment.</i> <input type="checkbox"/> <i>Discuss with your supervisor: When should assessments be conducted, and how is client self-sufficiency evaluated?</i> <input type="checkbox"/> <i>Activity: Identify which case management standards and expectations were implemented during the client assessments you observed (refer to Case Management Foundations section for reference). What is one best practice that you took away from the observation?</i>

<p><b>Providing Ongoing Services to Clients and Setting Goals with Clients</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Navigating Difficult Conversations with Clients</a></li> <li><input type="checkbox"/> <b>Explore:</b> <a href="#">Settle In</a> website for clients, available in 10 languages, and other <a href="#">Settle In resources</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Switchboard Community Support Line FAQ</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">How to Write a SMART Goal</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Demystifying the Family Self-Sufficiency Plan (FSSP)</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Case Capacity Calculator</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Discuss with your supervisor: What is the purpose of self-sufficiency plans?</i></li> <li><input type="checkbox"/> <i>Activity: Make a sign or poster for your desk to remind yourself to use SMART goals.</i></li> <li><input type="checkbox"/> <i>Activity: Review three client self-sufficiency plans. Are they SMART? Do they encourage sustainable self-sufficiency? Do you have a system to review or measure these plans?</i></li> <li><input type="checkbox"/> <i>Activity: Identify 2–3 client-facing resources from Settle In that may be most useful to your specific clients.</i></li> </ul>
<p><b>Case Consultations and Client Referrals</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Effective Case Consultations and Case Conferences</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Referral Letter Template</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Overcoming Barriers and Strengthening Enabling Factors</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Mental Health and Psychosocial Support Service Mapping</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Discuss with your supervisor the types of referrals for different client needs.</i></li> <li><input type="checkbox"/> <i>Activity: Discuss with your supervisor whether there is an existing service map for the clients in your program. If yes, familiarize yourself with the available information. If not, collect information on where and how you can work with communities to understand available supports, including how to create comprehensive referral lists and foster collaborative partnerships with key organizations and stakeholders.</i></li> </ul>
<p><b>Client Termination</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Ethics: Terminating Services*</a></li> </ul> <p><i>*Note that these articles are meant for social workers and MSW students, but the ethics and practices are applicable to anyone who works with clients.</i></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Reflect: Why is appropriate client termination essential to case management? What are the steps of appropriate client termination? Can you identify any potential challenges that may arise in the termination process?</i></li> <li><input type="checkbox"/> <i>Activity: Discuss termination protocols with your supervisor. When do you begin the process of termination? Does your agency have a specific procedure to follow or documentation to complete?</i></li> </ul>

		<input type="checkbox"/> <i>Activity: Observe a client “close out.” What information was covered during the close out? What is one best practice that you took away from the observation? Is there anything you would do differently?</i>
<b>Interpretation</b>	<input type="checkbox"/> <b>eLearning:</b> <a href="#">Introduction to Working with Interpreters</a> <input type="checkbox"/> <b>eLearning:</b> <a href="#">Overcoming Challenges in Interpretation</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Advocate for Clients’ Right to Interpretation Services</a> <input type="checkbox"/> <b>Review:</b> <a href="#">Scripts for Working with Interpreters</a> <input type="checkbox"/> <b>Review:</b> <a href="#">Apps for Translation and Interpretation</a>  <b>For Expanded Skill Building:</b> <input type="checkbox"/> <b>Watch:</b> <a href="#">Training and Supporting Community Members Serving as Interpreters</a>	<input type="checkbox"/> <i>Discuss with your supervisor: Why is interpretation important? What are some considerations you should make when seeking interpretation for a client?</i>  <input type="checkbox"/> <i>Activity: Connect with a skilled and experienced interpreter who works closely with your organization and ask them about their experiences interpreting with newcomers.</i>  <input type="checkbox"/> <i>Activity: Shadow three interpreted meetings and/or phone calls (with consent/permission from all involved).</i>



## Case Management Data & Documentation

The following section is meant to familiarize staff with the different components of case management data and documentation. Keeping timely and accurate documentation of services is a critical part of case management and may vary in different organizations.

Due Date:

Completion Date:

<p><b>Agency and Case Note Documentation</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Discuss:</b> with your supervisor or training officer how your organization stores client information and documentation</li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Case Note Template</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Creating High-Quality Case Management Documentation</a> or <b>Read:</b> <a href="#">Creating High-Quality Case Management Documentation Guide</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Making the Paperwork Work for You</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Writing Case Notes</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Review case notes for three cases.</i></li> <li><input type="checkbox"/> <i>Activity: Review agency privacy policies and safeguards.</i></li> <li><input type="checkbox"/> <i>Discuss with your supervisor: How are case notes documented within your agency?</i></li> <li><input type="checkbox"/> <i>Activity: Observe a case management activity and draft case notes based on the training you received. Make sure it contains all the information covered in the training.</i></li> </ul>
<p><b>Reporting</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review:</b> the processes needed for any agency reporting with your supervisor or training officer</li> <li><input type="checkbox"/> <b>Review:</b> report templates and examples of previously submitted reports</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Run and export a list of all active clients that have been served in the last month.</i></li> <li><input type="checkbox"/> <i>Activity: Run and export the percentage of clients who have received a monthly service.</i></li> <li><input type="checkbox"/> <i>Activity: Identify what data and documentation are required when submitting reports.</i></li> </ul>
<p><b>Case Files</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review:</b> your agency's case file checklist</li> <li><input type="checkbox"/> <b>Review:</b> your agency's case file quality assurance procedure</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Using a local case file review checklist, review three case files (two open and one closed case).</i></li> </ul>

## Self-Care and Well-being

This section provides case management staff with information needed to care for themselves and their well-being.

Due Date:

Completion Date:

<p><b>Self-Care and Staff Care</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Balancing the Demanding Needs of Case Management</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Enhancing Refugee Care: The Link Between Provider Well-Being and Service Quality</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Optimizing Your Self-Care Based on Your Coping Style</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">“I Was Already Burned Out, and Now This...” Strategies for Staff and Supervisors to Mitigate Burnout, Vicarious Trauma, and Other Occupational Hazards</a></li> <li><input type="checkbox"/> <b>Complete:</b> <a href="#">Self-Care and Lifestyle Balance Inventory</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Self-Care Tools: Core Concepts</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Self-Care Tools: Fundamental Skills for Self-Care</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Discuss with your supervisor: What are some ways your office prioritizes self-care and staff care? What are some ways you can incorporate self-care into your work routine?</i></li> <li><input type="checkbox"/> <i>Activity: Review your Self-Care and Lifestyle Balance Inventory. What are one or two practices you will commit to in the next month to improve your self-care? Who will keep you accountable?</i></li> </ul>
<p><b>Staff Supervision</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Preventing Occupational Hazards by Promoting Organizational Resilience</a></li> <li><input type="checkbox"/> <b>Listen:</b> <a href="#">How Can Supervisors and Organizations Support Staff Care?</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity for supervisors: What are the best practices you have seen implemented at the agency for supporting staff wellness? What possible suggestions for improvement might you have?</i></li> </ul>

## Specialty Case Management Topics

This section suggests additional resources for case managers hoping to cultivate expertise in different specialty areas or skillsets within refugee service provision and case management. This is not a mandatory training list for all case managers; rather, this large library of resources can be adapted to specific case managers' onboarding and training needs.

Due Date:

Completion Date:

### Interpersonal and Family Violence and Safety Planning

- Read:** [Introduction to Safety Planning](#)
  - Review:** [Low-Risk Safety Plan Template](#)
  - Read:** [Safety Planning for Family Violence: Guidance for Service Providers](#)
  - Watch:** [Family Violence Core Concepts for Newcomer Serving Organizations](#) or **Read:** [Family Violence: Core Concepts for Newcomer Serving Organizations](#)
  - Read:** [Meeting Newcomer Protection Needs Part II: A Collection of Resources on Sexual and Gender Based Violence](#)
- For Expanded Skill Building:**
- eLearning:** [Safety Planning in Resettlement, Asylum, & Integration Settings](#)
  - Watch:** [Refugee Children Exposed to Intimate Partner Violence](#)
  - Watch:** [Safety Planning with Unaccompanied Refugee Minors](#)
  - Read:** [Gender-Based Violence Information Guide](#)
  - Watch:** [Enhanced Safety Planning with Immigrant Survivors of Domestic and Sexual Violence](#)
  - Review:** [Initial Documents Immigrant Survivors May Need Checklist](#)
  - Complete:** [Domestic Violence Training](#)

- Activity: Discuss violence and safety protocols with your supervisor, and review safety plans. What is required of you? What is required of your supervisor?*
- Activity: Review this [Family Violence Safety Plan](#) or your agency's template if they have one. What is relevant to your client work, and what might need to be updated?*

**Refugee Families & Children  
/ Child Abuse and Neglect**

- Read:** [Fundamentals of Mandatory Reporting: A Guide for Refugee Service Providers in the U.S.](#) or **Watch:** [Foundations of Mandatory Reporting for Refugee Service Providers](#)
- Review for your state:** [Who Is a Mandated Reporter?](#)
- Read:** [An Introduction to Child Protection: Guide for Newcomer Youth Caregivers and Service Providers](#)
- Read:** [Growing Up in a New Country: A Positive Youth Development Toolkit for Working with Refugees and Immigrants](#)
- Read:** [Child Care Resources for Refugee Service Providers: Ensuring Working Families Thrive](#)
- Read** [Traumatic Stress Among Refugee Children: Responding to Abuse, Exploitation, and Trafficking](#) or **Watch:** [Traumatic Stress Among Refugee Children: Responding to Abuse, Exploitation, and Trafficking](#)

**For Expanded Skill Building:**

- Watch:** [Bullying Prevention & Response When Supporting Refugee Students](#) and/or **Read:** [Addressing Bullying: Scripted Conversations](#)
- Read:** [Combating Labor Trafficking: A Resource Collection for Providers Serving URM and Other Youth](#) or **Watch:** [Family Engagement with Refugee Populations](#)
- Read:** [Guardianship Fact Sheet](#)
- Watch:** [Traumatic Stress Among Refugee Children: Viewing Trauma Through a Developmental Lens](#)

- Discuss with your supervisor: What are the local child abuse and neglect reporting protocols? How can you integrate those protocols into existing case management and documentation processes?*

	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Child Protection Roundtable Session 1: Abuse and Neglect in the Newcomer Youth Context</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Strategies to Increase Newcomer Youth and Family Participation in Programs and Services</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Raising Teens in a New Country: A Guide for the Whole Family</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Raising a Girl: A Handbook for Newcomer Mothers and Daughters</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">How Do Family Interventions Impact Functioning of Newcomer Household Dynamics?</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Preventing Child Maltreatment Curriculum</a></li> </ul>	
<p><b>Child and Adult Education and Mentoring</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Cultural Orientation Basics: Education</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Cultural Orientation Basics: Learning English</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Welcoming Refugee Students Guides</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Increasing Family Engagement within Schools to Support Refugee Students</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">The U.S. Refugee School Impact Program</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Strategies and Tips for Refugee Service Providers to Promote Access to Early Childhood Programs</a> or <b>Watch:</b> <a href="#">Supporting Newcomers' Access to Early Childhood Services</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Promoting Supportive Mentoring Relationships with Newcomer Youth</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">School Enrollment for Students in Temporary Housing</a></li> <li><input type="checkbox"/> <b>Listen:</b> <a href="#">Supporting Newcomer Youth in Schools</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: List all resources and programming available for refugee children and youth at your office. Discuss referral processes with your supervisor.</i></li> <li><input type="checkbox"/> <i>Activity: Familiarize yourself with the adult education programs at your office and in the community.</i></li> </ul>

	<p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review:</b> <a href="#">The English Learner Family Toolkit</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">The English Learner Toolkit</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Newcomer Toolkit for Educators</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">What Works to Help Students in Immigrant and Refugee Families Complete Secondary Education?</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Refugee Adult Education: Improving Participation, Partnerships, and Program Design</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Resources to Help Explain Refugee Eligibility for College Admissions</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Helping Families Who Are Refugees Access Early Childhood Services</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Digital Citizenship in Refugee Youth Programs</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Higher Ed Afghan Response</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Statuses &amp; Eligibility for Financial Aid and In-State Tuition</a></li> <li><input type="checkbox"/> <b>eLearning:</b> <a href="#">Well-being for Educators of Students Affected by Forced Migration: Introduction to Mindfulness</a></li> </ul>	
<p><b>Mental Health and Wellness</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Mental Health and Psychosocial Support for Newcomers: Guidance for Service Providers</a> or <b>Watch:</b> <a href="#">Mental Health and Psychosocial Support (MHPSS): Foundations for Resettlement Caseworkers</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Opening Doors to Mental Health Support: A Screening Guide for Resettlement Providers</a></li> <li><input type="checkbox"/> <b>Listen:</b> <a href="#">A Discussion on Refugee Mental Health</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Mental Health First Aid Training Glossary of Key Terms</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Discuss with your supervisor: How can you approach mental health topics with clients from different cultures? What terminology should you use when introducing the idea of mental wellness? What are barriers to accessing mental health services for refugees at your office? What solutions have been implemented? If your office uses a standard mental health screening tool, how is it implemented?</i></li> </ul>

	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Access to Mental Health Services for Refugees</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Essential Concepts and Best Practices in Delivering MHPSS to People Who Have Experienced Forced Displacement</a></li> </ul> <p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Traumatic Stress Among Refugee Children and Youth Part I: Viewing Trauma Through a Developmental Lens</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Effective Practices for Mental Health Screening Across Cultures</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Facilitating Discussions about Mental Health with Afghan Newcomer Communities</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Building Capacity to Support the Mental Health of Immigrants and Refugees: A Toolkit for Settlement, Social, and Health Service Providers</a></li> </ul>	
<p><b>Physical Health and Medical Needs</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">An Introduction to Refugee Health</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Addressing Child and Family Health Care Needs</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">What is Health Case Management?</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Assisting Newcomers with Navigating the U.S. Health Care System: An Introduction for Direct Service Providers</a> or <b>Read:</b> <a href="#">Assisting Newcomers with Navigating the U.S. Health Care System</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Helping Clients Prepare for Initial Medical Appointments</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Understanding U.S. Domestic Medical Screening for Refugees and Other Newcomers</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Discuss with your supervisor: What are some of the primary physical health needs of clients in your location? Who are clients' primary health care providers in the area?</i></li> </ul>

	<p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Navigating Sensitive Health Conversations with Clients</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">What Resettlement Staff Should Know About Public Health Reportable Conditions</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Improving Well-Being for Refugees in Primary Care</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Five Tips for Providers on Supporting Teen and Youth Health and Wellness</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Leveraging Community Health Workers to Support Refugee Health</a></li> </ul>	
<p><b>Employment Services and Economic Empowerment</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Effective Employment Services</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Immigrant Jobseeker Journey Map</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Resumes and Getting Hired</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Adjusting to Life &amp; Work in the U.S.—Advice from Clients to Case Managers</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Adjusting to Life &amp; Work in the U.S.—Perspectives from Refugee Youth</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Helping Clients Overcome Employment Barriers</a> or <b>Read:</b> <a href="#">Helping Clients Overcome Employment Barriers</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Resume Building for First-Time Jobseekers: Tips for Service Providers</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Job Counseling for Career Pathways</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Intake Form: Newcomer Educational and Professional Background</a></li> </ul> <p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">4 Tips for Effective Employer Conversations</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Reflect: How does your role relate to employment services and economic empowerment?</i></li> </ul>



	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Establishing and Maintaining Employer Partnerships</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Identifying and Reporting Hiring Discrimination against Newcomers</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Three Ways to Support Newcomers' Personal Financial Health</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Launching &amp; Strengthening Career Pathways Programs: Approaches, Partnerships, and Funding Possibilities</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Personal Finance: Resources to Guide Newcomers on Measuring Their Financial Well-being and Managing Money in the U.S.</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Promoting Your Clients' Financial Wellbeing</a></li> <li><input type="checkbox"/> <b>Listen:</b> <a href="#">Empowering Refugee Women Through Workforce Development</a></li> </ul>	
<p><b>Housing and Environmental Safety</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Managing Newcomers' Housing Expectations</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Supporting Newcomers with Rental Housing: Key Information to Share with Clients</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Safety Planning and Emergency Preparedness for Refugee Housing</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Meeting Newcomer Protection Needs Part I: A Collection of Resources on Community Safety and Crime</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Sample Housing Walk Through Checklist</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">In-Home Health and Safety Checklist</a></li> </ul> <p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Rental Responsibilities and Housing Necessities Checklist</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Emergency Housing: Three Ways to Connect with Local Shelter Systems</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Reflect: How does your role interact with clients' housing? How do you anticipate housing becoming central or relevant to your case management?</i></li> </ul>

	<input type="checkbox"/> <b>Read:</b> <a href="#">Housing Selection 101</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Using Temporary Housing for Refugee Resettlement</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Navigating Housing Screening Criteria</a>	
<b>Immigration Legal Assistance</b>	<input type="checkbox"/> <b>Watch:</b> <a href="#">Integrating Legal Services Within Social Services Organizations</a> <input type="checkbox"/> <b>Watch:</b> <a href="#">Overview of the U.S. Naturalization Process and Citizenship Benefits</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Resource Collection: Legal Services for Afghan Newcomers</a>	<input type="checkbox"/> <i>Reflect: How does your role interact with immigration legal assistance? What are the essentials of immigration legal assistance that you need to know about to support clients in your role?</i>
<b>Indicators of Suicidality and Self-Harm</b>	<input type="checkbox"/> <b>Read:</b> <a href="#">Safety Planning for Suicidal Ideation</a> or <b>Watch:</b> <a href="#">Suicide Prevention and Safety Planning</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Suicidality Among Refugees</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Suicide and Refugee Children and Adolescents</a>  <b>For Expanded Skill Building:</b> <input type="checkbox"/> <b>eLearning:</b> <a href="#">Suicide Prevention in Resettlement, Asylum, and Integration Settings</a> <input type="checkbox"/> <b>Read:</b> <a href="#">Self-Harm Among Migrants &amp; Refugees</a>	<input type="checkbox"/> <i>Activity: With your supervisor, review the protocol for escalation if a client discloses suicidal ideation. What is your responsibility? What is your supervisor's responsibility?</i>  <input type="checkbox"/> <i>Activity: Complete a mock safety plan with your supervisor.</i>

### Community Engagement and Outreach

Community outreach and capacity building is an important part of newcomer case management to make sure clients are connected to the appropriate resources and referrals in the community.

Due Date:

Completion Date:

	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Strengthening Refugee Integration through Community Resource Mapping</a></li> <li><input type="checkbox"/> <b>Watch:</b> <a href="#">Five Ways the Community Can Help Refugees and Other Newcomers</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Harnessing Volunteer Energy to Support and Welcome Refugees in Your Community: Five Tips for Success</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Leveraging Client Feedback in Community Engagement</a></li> <li><input type="checkbox"/> <b>Read:</b> <a href="#">Community Needs Assessments with Newcomers</a></li> <li><input type="checkbox"/> <b>Review:</b> <a href="#">Trauma-Informed Survey Checklist</a></li> </ul> <p><b>For Expanded Skill Building:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>eLearning:</b> <a href="#">Trauma-Informed Survey Toolkit</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Activity: Review case notes for three cases. Discuss with your supervisor: What local resources are available to support those clients? What community partners are you trying to establish relationships with this year?</i></li> <li><input type="checkbox"/> <i>Activity: Complete <a href="#">Community Resource Mapping template</a> after viewing the webinar. Discuss with team as necessary.</i></li> </ul>
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We encourage you to continue learning as you progress in your role as a case manager. Please consult your supervisor or training officer with respect to additional opportunities to continue to grow within your role. Social learning opportunities, such as communities of practice or working groups, can also be a great way to exchange knowledge and learn from others! We encourage you to register for the [Switchboard newsletter](#) and engage with our other resources on our website.

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