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**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. Switchboard also offers other specialized onboarding guides, including the [Sample Intensive Case Management Onboarding Guide.](https://www.switchboardta.org/resource/sample-intensive-case-management-onboarding-guide/)

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| Learn More About Who We Serve | |
| This first section provides you with an introduction to some of the Office of Refugee Resettlement (ORR)-eligible populations you may serve through case management.  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.](https://www.acf.hhs.gov/orr/policy-guidance/status-and-documentation-requirements-orr-refugee-resettlement-program) | |
| Due Date:  Completion Date: | |
| Immigration Statuses and ORR Eligibility | Watch: [Understanding Newcomer Immigration Statuses](https://www.switchboardta.org/resource/understanding-newcomer-immigration-statuses/)  Watch: [How Resettlement Agencies Work with the U.S. Government](https://www.switchboardta.org/resource/how-resettlement-agencies-work-with-the-u-s-government/)  Read: [Getting Started in Navigating ORR Eligibility](https://www.switchboardta.org/blog/resource-collection-getting-started-in-navigating-orr-eligibility/) |
| Refugees | Watch: [Who are refugees and how do they arrive in the U.S.?](https://switchboardta.org/resource/who-are-refugees-and-how-do-they-arrive-in-the-united-states/)  Read: [Resettlement in the United States](https://www.unhcr.org/us/what-we-do/resettlement-united-states)  Watch: [What is refugee resettlement and what is UNHCR’s role?](https://youtu.be/mPu12hOoAu8) |
| Asylees & Asylum Seekers | Review: [Who is a Refugee, Afghan Evacuee, and Asylum Seeker?](https://www.switchboardta.org/resource/who-is-a-refugee-afghan-evacuee-and-asylum-seeker-2/)  Review: [Steps of the U.S. Asylum Process](https://rcusa.org/resettlement/asylum-process/)  Read: [I Was No Longer Safe in My Country: Yomardy’s Story of Seeking Asylum](https://worldrelief.org/chblog-yomardys-story/) |
| Cuban & Haitian Entrants | Read: [ORR Fact Sheet for Cuban/Haitian Entrants](https://www.acf.hhs.gov/sites/default/files/documents/orr/orr_fact_sheet_cuban_haitian_entrant.pdf) |
| Survivors of Human Trafficking | Read: [Labor Trafficking Resource Guide](https://frameworkta.org/resource/labor-trafficking-resource-guide/)  Watch: [Faces of Human Trafficking Series](https://ovc.ojp.gov/library/multimedia/list?series_filter=Faces%20of%20Human%20Trafficking)  Read:[An Introduction to Human Trafficking in the United States](https://ovc.ojp.gov/sites/g/files/xyckuh226/files/media/document/HT_Intro_to_HT_fact_sheet-508.pdf) |
| Afghan and Ukrainian Humanitarian Parolees | Read: [Resource List: Serving Ukrainian Newcomers](https://www.switchboardta.org/blog/resource-list-serving-ukrainian-newcomers/)  Read:[Useful Resources to Support Afghan Newcomers in the U.S.](https://www.switchboardta.org/blog/two-years-since-the-fall-of-afghanistan-useful-resources-to-support-afghan-newcomers-in-the-u-s/)  Read:[Getting to Know Afghan Newcomers: Recognizing Diversity, Ethnic Tensions, and Social Values](https://www.switchboardta.org/blog/getting-to-know-afghan-newcomers-recognizing-diversity-ethnic-tensions-and-social-values/)  Watch:[Cultural and Practical Considerations for Working with Ukrainian Clients](https://www.switchboardta.org/resource/cultural-and-practical-considerations-for-working-with-ukrainian-clients/)  Read:[Answering FAQs on Benefits for Ukrainian and Afghan Humanitarian Parolees Arriving On or After October 1 2023](https://www.switchboardta.org/blog/answering-faqs-on-benefits-for-ukrainian-and-afghan-humanitarian-parolees-arriving-on-or-after-october-1-2023/) |
| Special Immigrant Visas (SIVs) | Read:[Special Immigrant Visa (SIV): Application Vetting Approval](https://www.switchboardta.org/resource/special-immigrant-visa-siv-application-vetting-approval/)  Read:[Special Immigrant Visas for Afghans](https://www.switchboardta.org/resource/special-immigrant-visas-for-afghans/) |
| Unaccompanied Refugee Minors (URM) | Read:[Unaccompanied Refugee Minor Program Guide](https://www.switchboardta.org/resource/unaccompanied-refugee-minor-program-guide/)  Read: [The Unaccompanied Refugee Minors (URM) Program 101](https://www.switchboardta.org/resource/the-unaccompanied-refugee-minors-urm-program-101/)  Read:[Roles and Expectations in the Unaccompanied Refugee Minor (URM) Program](https://www.switchboardta.org/resource/roles-and-expectations-in-the-unaccompanied-refugee-minor-urm-program/) |

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| 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](https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English). | | |
| Due Date:  Completion Date: | | |
| Ethics of Service Provision | Read: National Association of Social Workers [Code of Ethics](https://www.socialworkers.org/about/ethics/code-of-ethics/code-of-ethics-english)  *\*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.* | *Activity: Choose two principles that stood out to you and explain why.* |
| Case Management Foundations | Watch: [Case Management Foundations](https://www.switchboardta.org/resource/case-management-foundations/)  Watch: [Practical Guide to Working With Refugees](https://www.switchboardta.org/resource/practical-guide-to-working-with-refugees-skills-techniques-and-considerations/)  Listen: [What is Motivational Interviewing?](https://switchboardta.org/resource/podcast-what-is-motivational-interviewing/) | *Activity: 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?* |
| Strengths-Based Approach | Watch: [Demystifying Strengths-Based Services to Foster Refugees’ Resilience](https://switchboardta.org/resource/webinar-demystifying-strengths-based-services-to-foster-refugees-resilience/)  Read: [What is a Strength-Based Approach?](https://positivepsychology.com/strengths-based-interventions/) | *Activity: Review a sample client intake and identify some of the client’s strengths.* |
| Principles of Trauma-Informed Care | Watch: [Trauma-Informed Care in Case Management](https://www.switchboardta.org/resource/trauma-informed-care-in-case-management/) or Read: [Trauma-Informed Care: A Primer for Refugee Service Providers](https://www.switchboardta.org/resource/trauma-informed-care-movement-towards-practice-2/)  Watch: [Traumatic Stress Among Refugee Children and Youth Part 2: Implementing Trauma-Informed Care with Children and Families](https://www.switchboardta.org/resource/traumatic-stress-among-refugee-children-and-youth-part-2-implementing-trauma-informed-care-with-children-and-families/)  Read: [Preventing Crises and De-Escalating Difficult Situations with Newcomer Clients](https://www.switchboardta.org/resource/preventing-crises-in-resettlement-de-escalation-with-a-trauma-awareness/)  Watch: [How Communities Can Respond to Grief](https://switchboardta.org/resource/how-communities-can-respond-to-grief-2/) | *Activity: 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?* |
| Defining Professional Case Management Boundaries | Watch:[Creating Balance in Case Management](https://switchboardta.org/resource/creating-balance-in-case-management/)  Watch: [Client Boundaries](https://healtorture.org/courses/case-management-101-client-boundaries/)  Watch:[Boundaries in the Electronic Age](https://switchboardta.org/resource/boundaries-in-the-electronic-age/)  Read: Internal Agency Policies on Boundaries (check with supervisor) | *Discuss with your supervisor: What are some challenges you anticipate with setting client boundaries? How can your supervisor assist with these challenges?*  *Discuss with your supervisor: What internal policies does your organization have in place to develop and preserve boundaries?* |
| Cultural Humility and Competency | Read: [Applying Cultural Humility, Awareness, and Competency in Refugee Resettlement](https://coresourceexchange.org/2023/06/13/applying-cultural-humility-awareness-and-competency-in-refugee-resettlement/?utm_source=rss&utm_medium=rss&utm_campaign=applying-cultural-humility-awareness-and-competency-in-refugee-resettlement)  Read: [Discussing the Refugee Experience with Dignity And Resilience](https://www.switchboardta.org/blog/discussing-the-refugee-experience-with-dignity-and-resilience/)  Read: Cultural Backgrounders for the most commonly served populations at your location ([Afghan](https://www.switchboardta.org/resource/afghan-backgrounder-2/), [Bhutanese](https://switchboardta.org/resource/cultural-backgrounder-bhutanese-refugee-families/), [Burmese (Myanmar)](https://www.switchboardta.org/resource/cultural-backgrounder-refugee-families-from-burma/), [Congolese](https://www.switchboardta.org/resource/cultural-backgrounder-congolese/), [Iraqi](https://www.switchboardta.org/resource/cultural-backgrounder-refugee-families-from-iraq/), [Rohingya](https://www.switchboardta.org/resource/rohingya-backgrounder/), and [Ukrainian](https://www.switchboardta.org/resource/ukrainian-backgrounder/))  For Expanded Skill Building:  Read: Refugee Wellness Guides for the most commonly served populations at your location ([Congolese](https://switchboardta.org/resource/refugee-wellness-country-guide-democratic-republic-of-congo-2/), [Syrian](https://switchboardta.org/resource/refugee-wellness-country-guide-syrian-arab-republic-2/), [Iraqi](https://switchboardta.org/resource/refugee-wellness-country-guide-iraq-2/), [Burmese](https://switchboardta.org/resource/refugee-wellness-country-guide-burma-myanmar-2/), [Somali](https://switchboardta.org/resource/refugee-wellness-country-guide-federal-republic-of-somalia-somalia-2/), and [Rohingya](https://switchboardta.org/resource/refugee-wellness-country-guide-burma-myanmar-rohingya-2/),)  Read: [Building a Culturally Informed Network of Refugee Mental Healthcare Providers](https://switchboardta.org/resource/info-guide-building-a-culturally-informed-network-of-refugee-mental-healthcare-providers/)  Read: [Fundamentals of Equity and Resettlement: Lessons from a Panel Discussion](https://www.switchboardta.org/blog/fundamentals-of-equity-and-resettlement-lessons-from-a-panel-discussion-2/)  Webinar: [Cultural Competence in Refugee Service Settings: What Does the Research Tell Us?](https://switchboardta.org/resource/cultural-competence-in-refugee-service-settings-what-does-the-research-tell-us/) | *Activity: Reflect and discuss: How do cultural competency and cultural humility differ? How can you use both concepts in your work with refugees? Why is cultural competency an ongoing process? How does your own culture or background affect your competency and humility in working with different newcomer populations?*  *On your own, reflect on the results of your* [*implicit bias tests*](https://www.learningforjustice.org/professional-development/test-yourself-for-hidden-bias)*. Were there any surprises?* |

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| 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: | | |
| Governmental Programs and Federal Assistance | Read: [Public Benefits Overview for Refugees and Other Humanitarian Immigrants](https://www.switchboardta.org/resource/public-benefits-overview-for-refugees-and-other-humanitarian-immigrants/)  Read: [Immigrants’ Eligibility for US Benefits: A Primer](https://www.migrationpolicy.org/research/immigrants-public-benefits-primer?eType=EmailBlastContent&eId=75b1636a-b944-4f15-86f4-b1efe410c87b)  Read: [Social Security Numbers for Noncitizens](https://www.switchboardta.org/resource/social-security-numbers-for-noncitizens/)  For Expanded Skill Building:  Watch: [Supplemental Security Income (SSI): An Introduction for Service Providers](https://www.switchboardta.org/resource/supplemental-security-income-ssi-an-introduction-for-service-providers/) or Read: [Supplemental Security Income (SSI): Answering Frequently Asked Questions for Service Providers](https://www.switchboardta.org/blog/supplemental-security-income-ssi-answering-frequently-asked-questions-for-service-providers/)  Read: [What You Should Know About the Free Application for Federal Student Aid (FAFSA) Updates](https://www.switchboardta.org/blog/what-you-should-know-about-the-free-application-for-federal-student-aid-fafsa-updates-2/)  Watch: [Employment Authorization Documentation Reference Guide for Refugee Service Providers in the U.S.](https://www.switchboardta.org/resource/employment-authorization-documentation-reference-guide-for-refugee-service-providers-in-the-u-s/)  Complete: [Introduction to HUD Affordable Housing for Newcomers](https://www.switchboardta.org/resource/introduction-to-hud-affordable-housing-for-newcomers/) | *Activity: Which programs are your clients eligible for? How might you interact with other government agencies or services to support your clients, including through referrals?* |

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| Office of Refugee Resettlement (ORR) Programs | Review: [ORR Resettlement Programs for Refugees](https://www.acf.hhs.gov/orr/programs/refugees)  Read: [Eligibility for Matching Grant (MG) Flow Chart](https://www.switchboardta.org/resource/eligibility-for-matching-grant-mg-flow-chart/)  Review: [ORR Preferred Communities (PC) Overview](https://www.acf.hhs.gov/orr/programs/refugees/pc)  Review: [ORR Cash and Medical Assistance (CMA) Overview](https://www.acf.hhs.gov/orr/programs/refugees/cma)  Review: [ORR Refugee Support Services (RSS) Overview](https://www.acf.hhs.gov/orr/programs/refugees/refugee-support-services)  For Expanded Skill Building:  Review: [ORR Refugee Health Overview](https://www.acf.hhs.gov/orr/programs/refugees/refugee-health)  Review: [ORR Refugee Health Promotion (RHP) Overview](https://www.acf.hhs.gov/orr/programs/refugees/rhp)  Review: [ORR Refugee School Impact (RSIG) Overview](https://www.acf.hhs.gov/orr/programs/refugees/school-impact)  Review: [ORR Refugee Youth Mentoring (RYM) Overview](https://www.acf.hhs.gov/orr/programs/refugees/youth-mentoring)  Review: [ORR Services to Older Refugees (SOR) Overview](https://www.acf.hhs.gov/orr/programs/refugees/services-older-refugees)  Review: [ORR Refugee Career Pathways Overview](https://www.acf.hhs.gov/orr/programs/refugees/refugee-career-pathways)  Review: [ORR Services to Afghan Survivors Impacted by Combat (SASIC) Overview](https://www.acf.hhs.gov/orr/programs/refugees/sasic)  Review: [Unaccompanied Refugee Minors (URM) Overview](https://www.acf.hhs.gov/orr/programs/refugees/urm)  Review: [ORR Wilson-Fish TANF Coordination Overview](https://www.acf.hhs.gov/orr/programs/refugees/wilson-fish-tanf-coordination-program)  Review: [ORR Ethnic Community Self Help Overview](https://www.acf.hhs.gov/orr/programs/refugees/ethnic-community-self-help) | *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?*  *Activity: If possible, connect with staff at other resettlement agencies locally or in your state to understand their programming and referral procedures.* |  |

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| Case Management Skills and Competencies | | |
| This section provides staff with information needed to provide services to clients and manage a caseload. | | |
| Due Date:  Completion Date: | | |
| Intake & Assessment | Review: Intake processes and required assessments with your supervisor or organization’s training officer  Observe: Two assessments with clients | *Activity: List the forms that are required to be completed during initial intake and assessment.*  *Discuss with your supervisor: When should assessments be conducted and how is client self-sufficiency evaluated?*  *Activity: Identify which case management standards and expectations were implemented (refer to Case Management Foundations section for reference). What is one best practice that you took away from the observation?* |
| Setting Goals with Clients | Watch: [How to Write a SMART Goal](https://www.khanacademy.org/partner-content/learnstorm-growth-mindset-activities-us/elementary-and-middle-school-activities/setting-goals/v/learnstorm-growth-mindset-how-to-write-a-smart-goal)  Read: [Demystifying the Family Self-Sufficiency Plan (FSSP)](https://www.switchboardta.org/blog/demystifying-the-family-self-sufficiency-plan-fssp-how-does-it-help-orr-state-refugee-coordinators-and-service-providers-improve-services/)  Discuss with your supervisor: What is the purpose of self-sufficiency plans? | *Activity: Make a sign or poster for your desk to remind yourself to use SMART goals.*  *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?* |
| Case Consultations and Client Referrals | Read: [Effective Case Consultations and Case Conference](https://www.switchboardta.org/resource/effective-case-consultations-and-case-conferences/)  Review: [Mental Health Referral Forms](https://switchboardta.org/resource/tool-mental-health-referral-and-new-provider-inquiry-forms/)  Watch: [Overcoming Barriers and Strengthening Enabling Factors](https://switchboardta.org/resource/webinar-access-to-mental-health-services-for-refugees-and-other-vulnerable-immigrants-in-the-u-sovercoming-barriers-and-strengthening-enabling-factors/)  Read: [Mental Health and Psychosocial Support Service Mapping](https://www.switchboardta.org/resource/mental-health-and-psychosocial-support-service-mapping/) | *Activity: Discuss with your supervisor the types of referrals for different client needs.*  *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.* |
| Client Termination | Read: [Ethics: Terminating Services](https://www.socialworktoday.com/news/eoe_0506.shtml)\*  *\*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.* | *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?*  *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?*  *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?* |
| Interpretation | E-learning: [Introduction to Working with Interpreters](https://switchboardta.org/courses/introduction-to-working-with-interpreters/)  E-learning: [Overcoming Challenges in Interpretation](https://learning.switchboardta.org/courses/Overcoming-Challenges-in-Interpretation)  Review: [Advocate for Clients’ Right to Interpretation Services](https://switchboardta.org/resource/language-access-understand-and-advocate-for-your-clients-right-to-interpretation-services-2/)  Review: [Scripts for Working with Interpreters](https://switchboardta.org/resource/scripts-for-working-with-interpreters/)  Review: [Apps for Translations and Interpretation](https://www.switchboardta.org/resource/apps-for-translation-and-interpretation/)  For Expanded Skill Building:  Watch: [Training and Supporting Community Members Serving as Interpreters](https://www.switchboardta.org/resource/training-and-supporting-community-members-serving-as-interpreters/) | *Discuss with supervisor: Why is interpretation important? What are some considerations you should make when seeking interpretation for a client?*  *Connect with a skilled and experienced interpreter who works closely with your organization and ask them about their experiences interpreting with newcomers.*  *Shadow three interpreted meetings and/or phone calls (with consent/permission from all involved).* |

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| 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: | | |
| Agency and Case Note Documentation | Discuss:with your supervisor or training officer how your organization stores client information and documentation  Review: [Case Note Template](https://www.switchboardta.org/resource/case-note-template/)  Watch:[Creating High-Quality Case Management Documentation](https://switchboardta.org/resource/creating-high-quality-case-management-documentation/) or Read:[Creating High-Quality Case Management Documentation Guide](https://switchboardta.org/resource/creating-high-quality-case-management-documentation-2/)  Read: [Making the Paperwork Work for You](https://www.switchboardta.org/blog/case-management-documentation/)  Watch:[Writing Case Notes](https://healtorture.org/courses/case-management-101-writing-case-notes/) | *Activity: Review case notes for three cases.*  *Activity: Review agency privacy policies and safeguards.*  *Discuss with your supervisor: How are case notes documented within your agency?*  *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.* |
| Reporting | Review:the processes needed for any agency reporting with your supervisor or training officer  Review: report templates and examples of previously submitted reports | *Activity: Run and export a list of all active clients that have been served in the last month.*  *Activity: Run and export the percentage of clients who have received a monthly service.*  *Activity: Identify what data and documentation are required when submitting reports.* |
| Case Files | Review: your agency’s case file checklist  Review: your agency’s case file quality assurance procedure | *Activity: Using a local case file review checklist, review three case files (two open and one closed case).* |

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| Self-Care and Wellbeing | | |
| This section provides case management staff with information needed to care for themselves and their wellbeing. | | |
| Due Date:  Completion Date: | | |
| Self-Care and Staff Care | Watch: [Balancing the Demanding Needs of Case Management](https://switchboardta.org/resource/balancing-the-demanding-needs-of-case-management-recording/)  Watch: [Optimizing Your Self-Care Based on Your Coping Style](https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=video&cd=1&cad=rja&uact=8&ved=0ahUKEwjf7MHCgKDWAhUU84MKHdvCDeEQtwIIKDAA&url=https%3A%2F%2Fwww.youtube.com%2Fwatch%3Fv%3DcidrkVEjMzQ&usg=AFQjCNGPvUIlX8BwPs9Wd6TXRwR1KQ-Gzg)  Watch: [“I Was Already Burned Out, And Now This…” Strategies For Staff And Supervisors To Mitigate Burnout, Vicarious Trauma, And Other Occupational Hazards](https://www.switchboardta.org/resource/i-was-already-burned-out-and-now-this-strategies-for-staff-and-supervisors-to-mitigate-burnout-vicarious-trauma-and-other-occupational-hazards/)  Complete: [Self-Care and Lifestyle Balance Inventory](https://www.headington-institute.org/wp-content/uploads/2020/08/R16-self-care-lifestyle-inventory-for-emergency-responders_24051.pdf)  Review: [Self-Care Tools: Core Concepts](https://www.switchboardta.org/resource/self-care-tools-core-concepts/)  Review: [Self-Care Tools: Fundamental Skills for Self-Care](https://www.switchboardta.org/resource/self-care-tools-fundamental-skills-for-self-care/) | *Discuss with 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?*  *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?* |
| Staff Supervision | Read: [Preventing Occupational Hazards by Promoting Organizational Resilience](https://switchboardta.org/resource/preventing-occupational-hazards-by-promoting-organizational-resilience/)  Listen: [How Can Supervisors and Organizations Support Staff Care?](https://switchboardta.org/resource/how-can-supervisors-and-organizations-support-staff-care/) | *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?* |

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| 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: | | | |
| Intimate Partner Violence (IPV) and Gender-Based Violence (GBV) | Watch: [Fundamentals of Gender-Based Violence (GBV) for Refugee Service Providers: The What, Why, and How of Safety Planning](https://www.switchboardta.org/resource/fundamentals-of-gender-based-violence-gbv-for-refugee-service-providers-the-what-why-and-how-of-safety-planning/), or Read: [Fundamentals of Gender-Based Violence (GBV) for Refugee Service Providers: The What, Why, and How of Safety Planning](https://www.switchboardta.org/resource/fundamentals-of-gender-based-violence-gbv-for-refugee-service-providers-the-what-why-and-how-of-safety-planning-2/)  Read: [Meeting Newcomer Protection Needs Part II: A Collection of Resources on Sexual and Gender Based Violence](https://www.switchboardta.org/blog/meeting-newcomers-protection-needs-part-ii-a-collection-of-resources-on-sexual-and-gender-based-violence/)  Review: [Power and Control Wheel for Immigrant Women (English and Spanish)](https://www.futureswithoutviolence.org/power-and-control-tactics-used-against-immigrant-women/)  Review: [Initial Documents Immigrant Survivors May Need Checklist](https://asistahelp.org/wp-content/uploads/2023/11/Documents-Immigrant-Survivors-May-Need.pdf)  For Expanded Skill Building:  E-Learning: [Responding to Intimate Partner Violence in Resettlement, Asylum, & Integration Settings](https://www.switchboardta.org/resource/responding-to-intimate-partner-violence-in-resettlement-asylum-integration-settings/)  E-Learning: [Safety Planning in Resettlement, Asylum, & Integration Settings](https://www.switchboardta.org/resource/safety-planning-in-resettlement-asylum-and-integration-settings/)  Watch: [Refugee Children Exposed to Intimate Partner Violence](https://switchboardta.org/resource/refugee-children-exposed-to-intimate-partner-violence-doubly-vulnerable-2/)  Watch: [Safety Planning with Unaccompanied Refugee Minors](https://www.switchboardta.org/resource/safety-planning-with-unaccompanied-refugee-minors/)  Read: [Gender-Based Violence Information Guide](https://www.switchboardta.org/resource/gender-based-violence/)  Explore: [ASISTA Trainings: Safety & Justice for Immigrant Survivors](https://asistahelp.org/inspire_events/)  Watch: [Enhanced Safety Planning with Immigrant Survivors of Domestic and Sexual Violence](https://www.youtube.com/watch?v=1yqB6qlmYws)  Complete: [Domestic Violence Training](https://sites.google.com/a/simmons.edu/dv-training/) | *Activity: Discuss the local IPV and GBV protocols with your supervisor, and review safety plans. What is required of you? What is required of your supervisor?* |
| Refugee Families & Children / Child Abuse and Neglect | Review for your state: [Who Is a Mandated Reporter?](https://mandatedreportertraining.com/resources/who-is-a-mandated-reporter/)  Read: [Growing Up in a New Country: A Positive Youth Development Toolkit for Working with Refugees and Immigrants](https://brycs.org/toolkit/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](https://www.switchboardta.org/blog/child-care-resources-for-refugee-service-providers-ensuring-working-families-thrive/)  Watch: [Traumatic Stress Among Refugee Children: Responding to Abuse, Exploitation, and Trafficking](https://www.switchboardta.org/resource/traumatic-stress-among-refugee-children-and-youth-part-3-responding-to-abuse-exploitation-and-trafficking/)  Read: [Working with Immigrant and Refugee Families: A Guide for Child Welfare Caseworkers](https://www.childwelfare.gov/resources/working-immigrant-and-refugee-families-guide-child-welfare-caseworkers/)  For Expanded Skill Building:  Read: [Combating Labor Trafficking: A Resource Collection for Providers Serving URMS and Other Youth](https://www.switchboardta.org/blog/combating-child-labor-trafficking-a-resource-collection-for-providers-serving-urms-and-other-youth/) or Watch: [Family Engagement with Refugee Populations](https://switchboardta.org/resource/family-engagement-with-refugee-populations-2/)  Read: [Guardianship Fact Sheet](https://switchboardta.org/resource/guardianship-face-sheet-for-staff-assisting-refugee-families/)  Read: [Caring for Former Unaccompanied Immigrant Minors: A Culturally Relevant and Trauma Responsive Toolkit for Providers](https://www.bbhouston.org/toolkit)  Watch: [Traumatic Stress Among Refugee Children: Viewing Trauma Through a Developmental Lens](https://www.switchboardta.org/resource/traumatic-stress-among-refugee-children-and-youth-part-i-viewing-trauma-through-a-developmental-lens/)  Read: [Raising Teens in a New Country: A Guide for the Whole Family](https://www.switchboardta.org/resource/raising-teens-in-a-new-country-a-guide-for-the-whole-family/)  Read: [Raising a Girl: A Handbook for Newcomer Mothers and Daughters](https://www.switchboardta.org/resource/raising-a-girl-a-handbook-for-newcomer-mothers-and-daughters/)  Review: [How Do Family Interventions Impact Functioning of Newcomer Household Dynamics?](https://www.switchboardta.org/resource/how-do-family-interventions-impact-functioning-of-newcomer-household-dynamics/)  Review: [Preventing Child Maltreatment Curriculum](https://www.switchboardta.org/resource/child-maltreatment-prevention-curriculum/) | *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?* |
| Child and Adult Education and Mentoring | Read: [Cultural Orientation Basics: Education](https://coresourceexchange.org/wp-content/uploads/2019/09/Basics-Education.pdf)  Read: [Cultural Orientation Basics: Learning English](https://coresourceexchange.org/wp-content/uploads/2019/09/Basics-Learning-English.pdf)  Read: [Welcoming Refugee Students Guides](https://www.switchboardta.org/resource/welcoming-refugee-students-guides-for-classroom-teachers-school-nurses-school-administrators-school-counselors-peer-mentors-and-parents-2/)  Watch: [Partnering with Schools to Provide Safe and Inclusive Learning Environments for Refugee Students](https://www.switchboardta.org/resource/webinar-partnering-with-schools-to-provide-safe-and-inclusive-learning-environments-for-refugee-students/)  Watch: [The U.S. Refugee School Impact Program](https://www.switchboardta.org/resource/the-u-s-refugee-school-impactprogram/)  Watch: [Promoting Supportive Mentoring Relationships with Newcomer Youth](https://www.switchboardta.org/resource/promoting-supportive-mentoring-relationships-with-newcomer-youth/)  Read: [School Enrollment for Students in Temporary Housing](https://www.switchboardta.org/resource/school-enrollment-for-students-in-temporary-housing/)  Listen: [Supporting Newcomer Youth in Schools](https://www.switchboardta.org/resource/supporting-newcomer-youth-in-schools/)  For Expanded Skill Building:  Review: [The English Learner Family Toolkit](https://www.switchboardta.org/resource/family-toolkit/)  Review: [The English Learner Toolkit](https://www.switchboardta.org/resource/english-learner-tool-kit/)  Review: [Newcomer Toolkit for Educators](https://www.switchboardta.org/resource/newcomer-toolkit-for-educators-2/)  Review: [What Works To Help Students In Immigrant And Refugee Families Complete Secondary Education?](https://www.switchboardta.org/resource/what-works-to-help-students-in-immigrant-and-refugee-families-complete-secondary-education/)  Watch: [Supporting Refugee Teens](https://switchboardta.org/resource/managing-trauma-tips-for-supporting-refugee-teens-in-schools-refugee-resettlement-and-other-contexts-2/)  Watch: [Refugee Adult Education: Improving Participation, Partnerships, and Program Design](https://www.switchboardta.org/resource/refugee-adult-education-improving-participation-partnerships-and-program-design/)  Review: [Resources to Help Explain Refugee Eligibility for College Admissions](https://www.switchboardta.org/resource/resources-to-help-explain-refugee-eligibility-for-college-admissions/)  Read: [Digital Citizenship in Refugee Youth Programs](https://www.switchboardta.org/resource/digital-citizenship-in-refugee-youth-programs/)  Review: [What is the Impact of Mentoring on Social, Emotional, and Academic Outcomes of Youth from Immigrant and Refugee Families?](https://www.switchboardta.org/resource/what-is-the-impact-of-mentoring-on-social-emotional-and-academic-outcomes-of-youth-from-immigrant-and-refugee-families/)  Read: [Higher Ed Afghan Response](https://www.switchboardta.org/resource/higher-ed-afghan-response/)  Review: [Statuses & Eligibility for Financial Aid and In-State Tuition](https://www.switchboardta.org/resource/statuses-eligibility-for-financial-aid-and-in-state-tuition/)  E-Learning: [Wellbeing for Educators of Students Affected by Forced Migration: Introduction to Mindfulness](https://www.switchboardta.org/resource/well-being-for-educators-of-students-affected-by-forced-migration-introduction-to-mindfulness/) | *Activity: List all resources and programming available for refugee children and youth at your office. Discuss referral processes with your supervisor.*  *Activity: Familiarize yourself with the adult education programs at your office and in the community.* | |
| Mental Health and Wellness | Listen: [A Discussion on Refugee Mental Health](https://www.switchboardta.org/resource/trauma-informed-care-for-newcomers/)  Review: [Mental Health First Aid Training Glossary of Key Terms](https://www.switchboardta.org/resource/mental-health-first-aid-training-glossary-of-key-terms/)  Watch: [Access to Mental Health Services for Refugees](https://switchboardta.org/resource/webinar-access-to-mental-health-services-for-refugees-and-other-vulnerable-immigrants-in-the-u-sovercoming-barriers-and-strengthening-enabling-factors/)  Watch: [A Trauma-informed Understanding of Mental Health & Psychosocial Support (MHPSS)](https://www.switchboardta.org/resource/a-trauma-informed-understanding-of-mental-health-psychosocial-support-mhpss/)  Read: [Essential Concepts and Best Practices in Delivering MHPSS to People Who Have Experienced Forced Displacement](https://www.switchboardta.org/resource/essential-concepts-and-best-practices-in-delivering-mhpss-to-people-who-have-experienced-forced-displacement/)  For Expanded Skill Building:  Watch: [Integrating Refugee Mental Healthcare](https://switchboardta.org/resource/integrating-refugee-mental-healthcare-rhs-15-and-healthcare-providers-2/)  Read: [Alternative Therapeutic Approaches to Refugee Mental Health](https://switchboardta.org/resource/alternative-therapeutic-approaches-to-refugee-mental-health-2/)  Watch: [Traumatic Stress Among Refugee Children and Youth Part I: Viewing Trauma Through a Developmental Lens](https://www.switchboardta.org/resource/traumatic-stress-among-refugee-children-and-youth-part-i-viewing-trauma-through-a-developmental-lens/)  Read: [Facilitating Discussions about Mental Health with Afghan Newcomer Communities](https://www.switchboardta.org/resource/facilitating-discussions-about-mental-health-with-afghan-newcomer-communities/)  Read: [Building Capacity to Support the Mental Health of Immigrants and Refugees: A Toolkit for Settlement, Social, and Health Service Providers](https://www.switchboardta.org/resource/building-capacity-to-support-the-mental-health-of-immigrants-and-refugees-a-toolkitkit-for-settlement-social-and-health-service-providers/) | *Discuss with supervisor: How can you approach mental health topics with culturally diverse clients? What language 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?* |
| Physical Health and Medical Needs | Read: [An Introduction to Refugee Health](https://www.switchboardta.org/resource/an-introduction-to-refugee-health/)  Read: [What is Health Case Management?](https://www.switchboardta.org/blog/what-is-health-case-management/)  Watch: [Assisting Newcomers with Navigating The U.S. Health Care System: An Introduction for Direct Service Providers](https://www.switchboardta.org/resource/assisting-newcomers-with-navigating-the-u-s-health-care-system-an-introduction-for-direct-service-providers/) or Read: [Assisting Newcomers with Navigating the U.S. Health Care System](https://www.switchboardta.org/resource/assisting-newcomers-with-navigating-the-u-s-health-care-system/)  Review: [Helping Clients Prepare for Initial Medical Appointments](https://www.switchboardta.org/blog/helping-clients-prepare-for-initial-medical-appointments/)  Watch: [Understanding U.S. Domestic Medical Screening for Refugees and Other Newcomers](https://www.switchboardta.org/resource/understanding-u-s-domestic-medical-screening-for-refugees-and-other-newcomers/)  For Expanded Skill Building:  Watch: [Providing Culturally Sensitive Sexual and Reproductive Health Information for Newcomer Youth](https://www.switchboardta.org/resource/providing-culturally-sensitive-sexual-and-reproductive-health-information-for-newcomer-youth/) or Read: [Providing Culturally Sensitive Sexual and Reproductive Health Information for Newcomer Youth](https://www.switchboardta.org/resource/providing-culturally-sensitive-sexual-and-reproductive-health-information-for-newcomer-youth-2/)  Read: [What Resettlement Staff Should Know About Public Health Reportable Conditions](https://www.switchboardta.org/resource/what-resettlement-staff-should-know-about-public-health-reportable-conditions/)  Review: [Improving Well-Being for Refugees in Primary Care](https://switchboardta.org/resource/improving-well-being-for-refugees-in-primary-care-a-toolkit-for-providers/) | *Discuss with 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?* | |
| Employment Services and Economic Empowerment | Watch: [Effective Employment Services](https://www.switchboardta.org/resource/effective-employment-services/)  Review: [Immigrant Jobseeker Journey Map](https://www.switchboardta.org/resource/immigrant-jobseeker-journey-map/)  Watch: [Adjusting To Life & Work In The U.S.— Advice From Clients To Case Managers](https://www.switchboardta.org/resource/adjusting-to-life-work-in-the-u-s-advice-from-clients-to-case-managers-2/)  Watch: [Adjusting To Life & Work In The U.S.— Perspectives From Refugee Youth](https://www.switchboardta.org/resource/adjusting-to-life-work-in-the-u-s-perspectives-from-refugee-youth-2/)  E-Learning: [Introduction to Strengths-Based Employment Services](https://www.switchboardta.org/resource/introduction-to-strengths-based-employment-services/)  Read: [Resume Building for First-Time Jobseekers: Tips for Service Providers](https://www.switchboardta.org/blog/resume-building-for-first-time-jobseekers-tips-for-service-providers/)  Watch: [Job Counseling for Career Pathways](https://www.switchboardta.org/resource/webinar-job-counseling-for-career-pathways/)  For Expanded Skill Building:  Watch: [4 Tips for Effective Employer Conversations Video](https://www.switchboardta.org/resource/4-tips-for-effective-employer-conversations/)  Watch: [Establishing and Maintaining Employer Partnerships](https://www.switchboardta.org/resource/establishing-and-maintaining-employer-partnerships/)  Watch: [Identifying and Reporting Hiring Discrimination against Newcomers](https://www.switchboardta.org/resource/identifying-and-reporting-hiring-discrimination-against-newcomers/)  Read: [Three Ways to Support Newcomers' Personal Financial Health](https://www.switchboardta.org/blog/three-ways-to-support-newcomers-personal-financial-health/)  Read: [Helping Clients Overcome Employment Barriers](https://www.switchboardta.org/resource/info-guide-helping-clients-overcome-employment-barriers/)  Watch: [Launching & Strengthening Career Pathways Programs: Approaches, Partnerships, and Funding Possibilities](https://www.switchboardta.org/resource/launching-strengthening-career-pathways-programs-approaches-partnerships-and-funding-possibilities/)  Read: [Personal Finance: Resources to Guide Newcomers on Measuring Their Financial Well-being and Managing Money in the U.S.](https://www.switchboardta.org/blog/personal-finance-resources-to-guide-newcomers-on-measuring-their-financial-well-being-and-managing-money-in-the-united-states/)  Read: [Promoting Your Clients’ Financial Wellbeing](https://www.switchboardta.org/resource/info-guide-promoting-your-clients-financial-wellbeing/)  Listen: [Empowering Refugee Women Through Workforce Development](https://www.switchboardta.org/resource/empowering-refugee-women-through-workforce-development/) | *Activity: How does your role relate to employment services and economic empowerment?* |
| Housing and Environmental Safety | Read: [Managing Newcomers’ Housing Expectations](https://www.switchboardta.org/blog/managing-newcomers-housing-expectations/)  Read: [Safety Planning and Emergency Preparedness for Refugee Housing](https://www.switchboardta.org/resource/safety-planning-and-emergency-preparedness-for-refugee-housing/)  Read: [Meeting Newcomer Protection Needs Part I: A Collection of Resources On Community Safety and Crime](https://www.switchboardta.org/blog/meeting-newcomers-protection-needs-part-i-a-collection-of-resources-on-community-safety-and-crime/)  Read: [Sample Housing Walk Through Checklist](https://www.switchboardta.org/resource/sample-housing-walk-through-checklist/)  For Expanded Skill Building:  Read: [Rental Responsibilities and Housing Necessities Checklist](https://www.switchboardta.org/resource/rental-responsibilities-and-housing-necessities-checklist/)  Read: [Emergency Housing: Three Ways to Connect with Local Shelter Systems](https://www.switchboardta.org/blog/emergency-housing-three-ways-to-connect-with-local-shelter-systems/)  Read: [Housing Selection 101](https://www.switchboardta.org/blog/housing-selection-101/)  Read: [Using Temporary Housing for Refugee Resettlement](https://www.switchboardta.org/resource/using-temporary-housing-for-refugee-resettlement/)  Read: [Navigating Housing Screening Criteria](https://www.switchboardta.org/resource/navigating-housing-screening-criteria/) | *Activity: How does your role interact with clients’ housing? How do you anticipate housing becoming central or relevant to your case management?* |
| Immigration Assistance | Watch: [Overview of the U.S. Naturalization Process and Citizenship Benefits](https://switchboardta.org/resource/overview-of-the-u-s-naturalization-process-and-citizenship-benefits-2/)  Read: [Resource Collection: Legal Services for Afghan Newcomers](https://www.switchboardta.org/blog/resource-collection-legal-services-for-afghan-newcomers/)  For Expanded Skill Building:  Watch: [Demystifying Filing For Afghan Re-Parole With USCIS: Providing Clarity And Guidance For Providers](https://www.switchboardta.org/resource/demystifying-filing-for-afghan-re-parole-with-uscis-providing-clarity-and-guidance-for-providers/)  Read: [Guide To Navigating The Humanitarian Parole I-134A Application For USCIS Sponsorship For Ukrainians, Cubans, Haitians, Nicaraguans, And Venezuelans](https://www.switchboardta.org/resource/guide-to-navigating-the-humanitarian-parole-i-134a-application-for-uscis-sponsorship-for-ukrainians-cubans-haitians-nicaraguans-and-venezuelans/) | *Activity: 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?* |
| Indicators of Suicidality and Self-Harm | Read: [Suicidality Among Refugees](https://switchboardta.org/resource/suicidality-among-refugees-information-guide-2/)  Read: [Suicide and Refugee Children and Adolescents](https://switchboardta.org/resource/suicide-and-refugee-children-and-adolescents/)  For Expanded Skill Building:  E-Learning: [Suicide Prevention in Resettlement, Asylum, and Integration Settings](https://www.switchboardta.org/resource/suicide-prevention-in-resettlement-asylum-and-integration-settings/) | *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?*  *Activity: Complete a mock safety plan with your supervisor.* |
| Serving LGBTQ+ Clients | Listen: [Serving LGBTQ+ Newcomers](https://www.switchboardta.org/resource/serving-lgbtq-newcomers/)  Review: [Resource List: Creating Safe Spaces for LGBTQ+ Clients](https://www.switchboardta.org/blog/resource-round-up-creating-safe-spaces-for-lgbtq-clients/)  For Expanded Skill Building:  Watch: [In Our Voices: The Journeys of LGBT Refugees and Asylees](https://www.switchboardta.org/resource/in-our-voices-the-journeys-of-lgbt-refugees-and-asylees/)  Read: [Rainbow Response: A Practical Guide to Resettling LGBT Refugees and Asylees](https://www.switchboardta.org/resource/rainbow-response-a-practical-guide-to-resettling-lgbt-refugees-and-asylees/)  Read: [What Works to Support LGBTQ+ Refugees](https://www.switchboardta.org/resource/what-works-to-support-lgbtq-refugees-2/)  Read: [Stronger Together: Supporting LGBT Asylum Seekers in the United States](https://assets2.hrc.org/files/assets/resources/LGBT_Asylum_Seekers_FINAL.pdf) | *Activity: What new skills have you learned or do you still need to learn to serve LGBTQ+ clients more equitably and effectively?* | |

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| 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: | | |
|  | Watch: [Strengthening Refugee Integration through Community Resource Mapping](https://switchboardta.org/resource/webinar-strengthening-refugee-integration-through-community-resource-mapping/)  Watch: [Five Ways the Community Can Help Refugees and Other Newcomers](https://www.switchboardta.org/resource/five-ways-the-community-can-help-refugees-and-other-newcomers/)  Read: [Harnessing Volunteer Energy to Support and Welcome Refugees in your Community: Five Tips for Success](https://welcomingamerica.org/resource/harnessing-volunteer-energy-support-and-welcome-refugees-your-community-five-tips-success/)  Read: [Leveraging Client Feedback in Community Engagement](https://www.switchboardta.org/resource/toolkit-leveraging-feedback-in-community-engagement/)  Read: [Community Needs Assessments with Newcomers](https://www.switchboardta.org/resource/community-needs-assessments-with-newcomers/)  Read: [Discussing the Refugee Experience with Dignity and Resilience](https://www.switchboardta.org/blog/discussing-the-refugee-experience-with-dignity-and-resilience/)  Review: [What works to build welcoming and inclusive communities?](https://www.switchboardta.org/resource/what-works-to-build-welcoming-and-inclusive-communities/) | *Activity: Review case notes for three cases. Discuss with supervisor: What local resources are available? What community partners are you trying to establish relationships with this year?*  *Activity: Complete* [*Community Resource Mapping template*](https://switchboardta.org/resource/community-resource-mapping-templates/) *after viewing the webinar. Discuss with team as necessary.* |

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](file:///C:\Users\LizTo\Downloads\switchboardta.org) and engage with our other resources on our website.

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