**R&P Case Note Guide for Co-Sponsors**

MANDATORY LANGUAGE IN RED

CSCM is responsible for ensuring all R&P case notes are entered before they are printed for the client’s file.
**CS = Co-Sponsor / CSCM = Co-Sponsor Case Manager / DCM = Director of Case Management / DOA=Date of Arrival / PA = Principal Applicant**

Other than the minimum requirements below, there are circumstances that must be case noted, including:

* If a client changes addresses
* If a client goes to the hospital for an urgent issue (not routine care)
* If a client out-migrates before their 90th day
* If a problem is mentioned in one case note, there must be a follow up case note describing the resolution (missing Home Supply goods, apartment maintenance, etc.)

Style guidelines:

* Use the third person (“CS took client to DSS”, not “I took client to DSS”)
* Only include names of clients in this specific case (if referring to a brother who is on a different case, say “brother”)
* Specify who you are (CS + Initials or CSCM)

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| **Title** | **Deadline After DOA** | **Person Responsible** | **Case Note Text** |
| Co-Sponsor Orientation | Pre-DOA | CSCM | CS attended orientation session led by Ashley Makar for potential co-sponsors |
| Co-Sponsor Training | Pre-DOA | CSCM | CS participated in Co-Sponsor Training held at IRIS on [date(s)]. Training topics include perspectives on/preparation for co-sponsorship, case management, R&P finances, R&P paperwork, health, acculturation/cross-cultural training, employment, ESOL, education, immigration/legal matters, and next steps for becoming bona fide (“green lit”) co-sponsors. |
| Co-Sponsor Application/Self-Assessment | Pre-DOA | CSCM | CS application/self-assessment identifying key resources and capabilities to aid newly arrived refugee family resettling in the community submitted by \_\_\_\_\_\_\_\_ on (date). Approved by CSCM and ED on \_\_\_\_\_\_\_\_\_\_\_. |
| Assurance | Pre-DOA | DCM | Case referred to IRIS for assurance.Case marked as ready to assure. |
| UST evaluation & orientation | Pre-DOA | DCM | UST is PA’s \_\_\_\_\_\_\_\_\_\_\_\_\_. DCM contacted/met with UST to provide orientation and conduct evaluation. UST commitment form was completed, and a copy was provided to UST. Interpretation was provided by\_\_\_\_\_\_. |
| Arrival notice | Pre-DOA | DCM | Arrival notice received via email.Case scheduled to arrive on \_\_\_\_\_\_. |
| CS Offer/Placement/Commitment | Pre-DOA | CSCM | Case offered to (CS Name) for co-sponsorship. CS had previously submitted an application/self-assessment which was approved by IRIS. CS accepted offer via submission of signed Co-Sponsor Commitment Form and IRIS Memorandum of Understanding. CS will begin preparations in advance of pre-arrival meeting to be scheduled. |
| Pre-Arrival Meeting | Pre-DOA | CSCM | Presented to the (CS Group Name) chaired by (cosponsor contact person[s]) at (meeting location) in (town/city), CT. Provided demographic information about the family such as names, dates and places of birth, religion, language proficiency, education level, and any medical issues along with basic cultural orientation. Discussed pickup procedures (e.g., New Haven vs. JFK/EWR). Reviewed pre-arrival housing and hospitality arrangements (e.g., set-up of home, preparation of welcome meal) they will make. Outlined key figures, timeline and procedures surrounding acquisition of Social Security cards and state benefits administered by DSS (i.e., TFA, SNAP, HUSKY), and how/when pocket money is to be disbursed prior to receiving cash benefits (i.e., upon arrival, each week as necessary). Explained that CSCM would send them completed application paperwork for Social Security and DSS applications on or before the family’s day of arrival. Reviewed case note requirements, including content and frequency. Went over rental assistance policy and how it is determined once an employment assessment is conducted. Instructions provided on conducting pre-arrival/arrival arrangements and protocols, as well as the next day/24hour visit and presentation of required topics for the case management intake by day 5. Discussed sequence of required post-arrival meetings at/around days 10 (employment assessment), 45 (halfway meeting), 90 (end of R&P, goals to 180), and 180 (evaluation of progress, goals for 365), as well as associated R&P and case file documentation requirements due at 10, 45, and 90 days.  (if applicable: Examples of specific questions, Anything unusual that happened, any preparations for special needs that were discussed) |
| Housing decision/Safety evaluation | Pre-DOA | **CS** | Several housing options were considered for this case including\_\_\_\_\_\_\_\_\_\_\_\_\_. Home safety evaluations were conducted. Decision made to acquire \_\_\_\_\_\_\_\_\_\_\_\_ for case because \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Rent is \_\_\_\_, SD is \_\_\_\_\_\_. Lease signed on \_\_\_\_\_\_\_. |
| Apartment setup | Pre-DOA | **CS** | CS volunteers completed apartment setup, including all required furniture and household supplies. Utilities have been turned on and are working. Home supply list was completed and submitted to clients’ CSCM.  |
| Special needs prep  | Pre-DOA (if applicable) | **CS** |  |
| Arrival interpreter & hot meal | Pre-DOA | **CS** | CS called a community member, \_\_\_, who agreed to be interpreter for arrival. CS coordinated with another community member, \_\_\_\_\_\_, to prepare the hot meal. CS arranged for interpreter to be ready for the arrival and for a hot meal to be prepared for the arrival.  |
| Groceries and appointments | Pre-DOA | **CS** | CS purchased groceries and set up in the apartment. CS and CSCM scheduled clients’ upcoming appointments for the next several weeks, including CM meetings, Social Security and Department of Social Service visits, and community orientations.  |
| Provision of Clothing (Goodwill or upon arrival) | DOA or after | **CS** | CS provided clients with coats, hats, gloves, scarves and boots upon arrival. CS accompanied clients to shop for and buy affordable seasonal clothing for the family. Clients confirmed that they have seasonal clothing and do not need to shop for or be given anything else. Interpretation was provided by\_\_\_\_\_\_. |
| Arrival | DOA | **CS** | CS picked up clients and transported them to their apartment. Interpretation was provided by\_\_\_\_\_\_.\_. CS inquired about any health problems, clients reported feeling fine. CS inquired about any other immediate needs of the clients. Clients were given pocket money for each adult family member and cell phone. CS explained how to dial 911, how to call their co-sponsor, and how to call IRIS’s emergency phone line. Clients were given a reference sheet that includes information on their address, cell phone number, IRIS information, case manager contact information, and emergency numbers. CS arranged home visit for the following day. Clients were given a culturally appropriate hot meal and a car seat for the child. (\*For clients with children: Clients were given a car seat per child.) |
| 24 hour home visit | 24 hours (from DOA) | **CS** | CS met with clients at house to conduct 24-hour home visit. Interpretation was provided by-----. CS assessed clients’ welfare, living conditions, and current and expected needs. This meeting serves as an orientation on home and personal safety. CS instructed clients on several topics: how to use stove, oven, bathroom appliances, and door locks; how to check to make sure smoke detectors are working; how to prevent fires and what to do if there is a fire in the home; how to ensure personal safety in the US; how to ensure lead and basic health safety; how to ensure children’s safety and the importance of learning one’s address and phone number quickly. Clients know how to dial 911 and communicate address and phone via poster on refrigerator. CS made appointment for intake at client home. CS gave clients business card and confirmed clients know how to contact CS. If late, explain why. |
| Intake meeting | 5 business days | **CS** | CS completed intake with clients. Interpretation was provided by\_\_\_\_\_\_.\_. This meeting serves as an orientation to personal finances, the role of the resettlement agency, and public assistance. CS explained role of IRIS – that they help refugees through the provision of items, a small amount of pocket money, and rental assistance to meet initial needs, in addition to a limited scope of services, and advocacy on refugees’ behalf to receive service for which they are eligible. Clients understood that the assistance is limited and benefits vary across agencies, locations and cases, and that quality and quantity of items will vary. CS explained DSS benefits and that IRIS will help client get signed up for these (and other) benefits, as applicable. Clients understood that public assistance is available to help them pay for their needs, but is limited in amount and scope. CS informed clients that all public benefits require recipients to meet certain requirements and take part in certain responsibilities. CS explained role in coordinating with IRIS CSCM to facilitate employment services, health and wellness coordination, ESOL and education. CS explained CORE classes and necessity to attend. Completed referral to food bank. Clients are now able to identify basic services provided by IRIS. Discussed the fact that IRIS and clients must work together as a team; both have responsibilities. Clients acknowledged importance of learning English – CS explained different ways to strengthen language skills, emphasized courses at adult education and/or Literacy Volunteers of America (LVA). CS explained and had clients sign all necessary documents.(\*If client is between 18-24 years old, add: CS assisted client in enrolling for selective service.)If late, explain why. |
| Social Security | 7 business days | **CS** | CS accompanied clients to Social Security to apply for cards. Application process went smoothly; no follow up needed.Plural refugee, 4 wk wait: CS accompanied clients to Social Security to apply for cards. Clients were told they must wait for Homeland Security to verify their immigration status before their SS applications could be processed. If clients have not received cards four weeks from today, CS will contact Social Security.Interpretation was provided by\_\_\_\_\_\_.Plural SIV, 4 wk wait:CS accompanied clients to Social Security to apply for cards. Clients applied at port of entry. If clients have not received cards four weeks from today, CS will assist clients to reapply for SS cards. Interpretation was provided by\_\_\_\_\_\_.2nd visit:CS returned with client to reapply for a Social Security card after waiting 30 days for the card to arrive. Application process went smoothly and card should arrive within 2 weeks.Interpretation was provided by\_\_\_\_\_\_.If late, explain why. |
| DSS | 7 business days | **CS** | CS accompanied clients to DSS to apply for food stamps, cash and medical benefits. While waiting at DSS, CS and clients practiced clients’ address and looked at a local and state map of Connecticut. Clients understand where they live in the U.S. (region, state, city). Application successful. Clients will receive EBT card in the mail in 4-6 days. Clients were approved for medical insurance and were given insurance numbers. Interpretation was provided by\_\_\_\_\_\_.If late, explain why. |
| AR-11 filing  | 10 business days | CSCM | CSCM/Intern filed AR-11s for clients updated with their new address and PDF of all forms sent to CS for their and the family’s records. |
| IRIS First Visit/Employment Assessment (EA) | 10 business days | CSCM | CSCM conducted home visit for purpose of assessing: welfare of the family, living conditions, and current or expected needs. Confirmed knowledge of TFA and SNAP benefits. Discussed R&P money and IRIS rental assistance policy which will provide assistance for \_\_\_\_\_\_ months. Reviewed roles of IRIS and CS and ensured that client understood these. Answered clients’ questions. CSCM then met with adult clients to conduct Employment Assessment. Reviewed employment and education history and discussed job goals and preferences. Employment section of service plan completed. Resume to be created by CS. Interpretation was provided by\_\_\_\_\_\_.If late, explain why. |
| ESOL Referral/Registration | 10 business days | **CS** | CS referred adult clients to ESL and facilitated registration for classes at (organization/location). Interpretation was provided by\_\_\_\_\_\_.\_\_\_ unable to attend ESOL classes due to lack of childcare. \_\_\_ will consider child-friendly ESOL options (at the library, the mosque, etc.).If late, explain why. |
| Community Orientation:Grocery & LaundryBus Orientation  | None | **CS** | Walking to laundry, grocery and park:This orientation introduces clients to their new community. Interpretation was provided by\_\_\_\_\_\_.\_\_\_ showed clients how to travel from home to the grocery store, and how to grocery shop. \_\_\_ showed clients how to walk to the laundromat and helped them do laundry as a demonstration. Clients also learned to walk to the nearest park and to other points of interest. Through this orientation, clients are now able to identify community services relevant to their specific needs, such as senior services or childcare/daycare, Ethnic Community-Based Organizations, where other members of their home community, the library, houses of worship, community recreation, banks, and the post office.Bus Orientation: This orientation introduces clients to their new community and to the public transportation system. \_\_\_showed clients how to travel from home to key points of interest and to practice withdrawing cash from the ATM to purchase bus passes in their community. Through this orientation, clients are now able to identify community services relevant to their specific needs, such as senior services or childcare/daycare, Ethnic Community-Based Organizations, where other members of their home community, the library, houses of worship, community recreation, banks, and the post office.Combined: This orientation introduces clients to their new community and to the public transportation system. Intern showed clients how to travel from home to to the local grocery store and laundromat, and to other points of interest. Through this orientation, clients are now able to identify community services relevant to their specific needs, such as senior services or childcare/daycare, Ethnic Community-Based Organizations, where other members of their home community, the library, houses of worship, community recreation, banks, and the post office. |
| Budget Meeting and Lease | None | **CS** | CS met with clients to explain R&P budget and client’s financial obligations. Interpretation was provided by\_\_\_\_\_\_.Went through IRIS rental assistance policy and explained family’s \_\_\_ month plan. Clients understand the importance and process of paying rent and utilities, as well as other expenses such as cell phone and transportation costs. Clients understand their obligation to repay the travel loan. Also went through lease with clients, explained responsibilities of landlords and tenants. CS explained that most leases here are for one year, and IRIS was not able to get this landlord to agree to a shorter term lease. Clients understand the effects of moving addresses, how to submit a change of address form, and that a lease is a legal document, and breaking it can therefore result in being taken to court by the landlord. CS explained to clients that they are always welcome to talk with their landlord directly about a desire to move or lower rent, but that IRIS has no control over landlords’ decisions on these matters. CS explained IRIS’ policy for exceptional rental assistance if family does not have sufficient employment at the end of their standard rental assistance plan.  |
| RHA Pre-screening  | 30-45 days | **CS** | CS accompanied clients to [health center/doctor’s office name] for pre-screening. Interpretation was provided by\_\_\_\_\_\_.If late, explain why. |
| RHA | 30-45 days | **CS** | CS accompanied clients to [health center/doctor’s office name] for RHA.. Interpretation was provided by\_\_\_\_\_\_.If late, explain why.*Please replicate information below for each individual in family:*Seen by:PCP assigned:Follow -up appointment scheduled:Vaccines received:Immunity for:Prescriptions (Rx):Rx paper or sent electronically to \_\_\_\_ pharmacy.Referrals:-reason for referral-contact number for referral office if available Referrals:Main health concern/s: |
| WIC(if applicable) | None | **CS** | CS ensured that paperwork for enrollment in WIC was completed. Showed clients where WIC appointments are. Explained what WIC is and what benefits it would entitle clients to. Interpretation was provided by\_\_\_\_\_\_. |
| 30-Day Visit | 30 days | **CS** | CS conducted the 30-Day formal home visit with clients. Interpretation was provided by\_\_\_\_\_\_.CS conducted an assessment of clients’ welfare and their current and expected needs, especially concerning public assistance, medical, ESOL, employment, school, and other needs. CS completed home visit form to ensure housing remains decent, safe and sanitary.If late, explain why. |
| Resettlement Plan | 30 days | **CS** | Resettlement Plan completed with clients per instructions sent to CS by CSCM following employmetn asssessment. Interpretation was provided by\_\_\_\_\_\_.See form. If late, explain why. |
| School Registration | 30 days | **CS** | [Name children] were registered at [Name school]. \_\_\_ accompanied parent(s) to Board of Ed. Children began school on\_\_\_\_. Transportation for first day(s) was provided by….\_\_\_ ensured that bus schedule was communicated to parents and walked with kids and parent to the bus stop on \_\_\_\_\_\_. Interpretation was provided by\_\_\_\_\_\_. \_\_ communicated with parent(s) in \_\_\_\_\_\_\_. If late, explain why. |
| IRIS Second Visit | 45 days | CSCM | CSCM met with clients in their home. The purpose of this meeting was to assess employment and other resettlement progress midway through the R&P period. Clients understand upcoming changes in financial assistance and services. Clients can name where their household income will come from as R&P and CS assistance declines or ends. |
| Employment Authorization Card received  | 90 days  | **CS** | Clients received Employment Authorization cards.  |
| Social Security Card received  | 90 days | **CS** | Clients received Social Security cards.  |
| CORE | 90 days | IRIS CORE team |  attended the following cultural Orientation on \_\_\_\_\_\_\_. Interpretation was provided by\_\_\_\_\_\_\_\_\_.Welcome/Expectations & New Skills: This class serves as an orientation to cultural adjustment. This section was led by \_\_\_\_\_\_\_\_\_,Director \_\_\_\_\_\_\_\_\_. Participants learn about cultural norms and expectations that are fairly widespread throughout the U.S. and about core characteristics that define the American experience. Clients learn and practice four new skills that are essential in their first 90 days in the USA: 1) how to greet new people and acquaintances, including how to respectfully decline a handshake for gender sensitivity reasons; 2) how to say their phone numbers; 3) how to write their names; 4) how to arrange and say their addresses, demonstrating an understanding of where they live in the U.S. (region, state, city); and 5) how to keep appointments and use a calendar. Clients demonstrate knowledge of their own address, how to make a phone call.Education & Employment: This class serves as an orientation to US laws and education and an orientation to employment and English . It was led by \_\_\_\_\_\_\_\_\_ ,Director\_\_\_\_\_\_\_\_, who led the clients in a discussion about laws and expectations regarding public school in America. Clients learn how parenting practices may differ in the U.S. from what they are used to. Clients brainstorm ways to be involved in their children’s schooling. The presenter begins by discussing client rights and protections within the workplace and that they are not to be discriminated against or harassed based on their various identities. Clients understand that they are authorized workers in the United States as a refugee and learn about their rights and responsibilities as workers. Clients discuss their expectations with the employment team and learn the realities of the U.S. workplace and job search, learning that they have the central role in securing a job for themselves and that their first job might not be in their chosen profession. Participants understand that employment and job retention are essential to survival in the U.S. and must be the primary focus for all employable adults. Participants learn about the importance of advocating for themselves as potential employees and being proactive in their job search. Clients understand the resources available to them at the agency for looking for employment. They discuss the importance of learning English and the opportunities available at and outside the office for learning the language. Finally, clients learn that there are many options for continuing education and training beyond compulsory K-12 schooling but that they must weigh the value of continuing education for adults and teenagers against the need to work.Rights and Laws: This class serves as an orientation to US laws, safety, refugee status, and “your new community.” Class was led be \_\_\_\_\_\_\_\_, Position at IRIS\_\_\_\_\_\_, gave a presentation about clients’ rights and the laws they must follow as American residents and refugees. Clients list the benefits they are eligible to access as low-income families. The presenter explains that the U.S. is governed by the rule of law and that police and U.S. laws exist to help and protect all residents. Clients learn about laws governing behavior in public, about community and public services available to support residents, and that the local resettlement agency will assist refugees in becoming acquainted with their new community. Additionally, this class focuses on staying safe in their new communities, including unfamiliar weather safety, pedestrian and street safety, basic home and fire safety, and the importance of emergency safety plans. Participants learn that owning or having access to a personal vehicle comes with benefits and responsibilities. They discuss safety issues and legal requirements related to the use of cars, including the use of child seats. Clients answer trivia questions about rights and laws pertaining to obtaining a driver’s license, when and where you are allowed to consume alcohol and smoke, and what to do if you are threatened. Housing: This class serves as an orientation to housing. It was led by \_\_\_\_\_\_\_\_\_\_\_,\_\_\_\_\_\_\_\_\_\_ Coordinator . Clients discuss differences between their homes in New Haven and in their home countries. They learn that the local resettlement agency provides assistance in home orientation, after which housekeeping and home maintenance are individual and family responsibilities. They learn about the variety of housing arrangements available in the city. Participants discuss landlord and tenant rights and responsibilities regarding bill payment, maintenance, and utilities. The instructor explains the concept of a lease, including the responsibilities of landlords and tenants. Clients learn about the effects of moving addresses and that a lease is a legal document, and breaking it can result in being taken to court by the landlord. Clients describe safe and appropriate use of basic appliances and facilities, as well as household products. Additionally, clients participate in an activity to discuss the things that can be done (such as hosting friends), and the items they would like (such as rugs), to help make their new house a home.Budgeting: This class serves as an orientation to the role of IRIS and budgeting and personal finance.This portion was led by \_\_\_\_\_\_\_\_\_\_, Case Management Director, Presenters explain that IRIS is a nonprofit agency and where its funding comes from and how its annual budget is spent. Presenters explain that the philosophy of self-sufficiency and self-advocacy are central to American culture and to refugees’ cultural adjustment. Clients understand that the amount they are paying is contingent on the type of housing and size of family. Additionally clients understand their responsibilities for making payments and the importance of timely payments, and what might happen if they do not pay rent.Wellness & Heath : This class serves as an orientation to health and cultural adjustment. \_\_\_\_\_\_\_\_\_\_\_, Health care promoter, leads clients in a discussion group about stress and various activities and methods to cope with the feelings they experience from the stress of their new situations. Clients learn about the various stages of cultural adjustment. They consider the importance of preventative health measures in keeping their mind, body, and spirit well. They learn about the psychological health and community resources available to them and how to access them. Clients understand that ethnic or religious local congregations may be a good source of support and connection to the community. Clients learn about extra acculturation programs available to them, including co-ed and women’s soccer programs and the Cultural Companions program.Health: This class serves as an orientation to health and hygiene. Clients learn about the differences between their home medical systems and the US medical system, including insurance, what medical services are available to them, different health norms, and the importance of making and keeping appointments. The presenter explains the difference between the emergency room, urgent care, routine medical appointments, and the pharmacy. Participants learn that only critical and immediate healthcare needs may be met in the initial weeks of resettlement, and that initial health screenings and immunizations will be scheduled within thirty days of arrival. Clients participate in an activity in which they are given different health issue scenarios and must choose. This helps to distinguish between urgent and routine health care. They understand the resources available to them for assistance with scheduling and managing medical appointments and what their own responsibilities are for taking control of their own health care needs within the first 60-90 days. They also practice asking for an interpreter in an emergency situation.Education & Parenting and child abuse:: This class serves as an orientation to US laws and education. It was led by \_\_\_\_\_\_\_\_\_\_\_, Youth Services Manager, who led the clients in a discussion about laws and expectations regarding public school in America. Clients learn how parenting practices may differ in the U.S. from what they are used to. Clients brainstorm ways to be involved in their children’s schooling. Parenting and child abuse: They learn about suggested parenting techniques for nutrition, hygiene, and sleep. They discuss what happens when parents hit children in their home countries, and learn about child abuse laws in the USA. They discuss alternative, “healthy” discipline options. They practice safely crossing the street with their children outside alongside the instructor and volunteers. Domestic Violence & Abuse: This class serves as an orientation to US laws and cultural adjustment. It was led by \_\_\_\_\_\_\_\_\_\_\_, Case Management Director Clients engage in a discussion about what happens when spouses hit each other in their home country, about laws and restrictions regarding domestic violence in the USA, and about domestic violence resources available to families and how to access them. They also watch a live skit portraying a refugee couple struggling with spousal violence, and split by gender group to discuss each partner’s options and feelings in the situation, as well as how their families will handle shifting gender roles and family responsibilities in America. Finally, both groups come together and the leaders anonymously share participants’ comments from the breakout groups.If late, explain why. |
| Cultural Orientation (CO) Assessment | 90 days | **CS** | CO Assessment completed with adult clients following CORE. Interpretation was provided by\_\_\_\_\_\_.Scores are as follows:  |
| IRIS Third Visit | 90 days | CSCM | CSCM reviewed QuickBooks report with clients and clients signed all receipts. Interpretation was provided by\_\_\_\_\_\_.CSCM went over DSS cash, HUSKY, and SNAP benefits duration and eligibility. Clients are aware that he/she will receive a Periodic Report Form from DSS about SNAP soon. Clients were reminded of their lease commitment. Clients signed the 90-Day Core Services Checklist. CSCM, CS, and clients reviewed resettlement progress at 90 days and will discuss progress again at 180 days. Clients understand upcoming changes in IRIS financial assistance and services. Clients can name where their household income will come from as IRIS assistance declines or ends.If late, explain why. |