



## Co-Sponsor Case Management Intake Checklist

PA: \_\_\_\_\_ CS: \_\_\_\_\_ Date: \_\_\_\_\_

Other adult family member(s):

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### **CLIENT CONTACT INFO:**

- Ask if client(s) has phone number they use with **Whatsapp**:

\_\_\_\_\_

- Other cell phone number(s) for each family member:

\_\_\_\_\_

- Ask if client(s) has **email address(es)**:

\_\_\_\_\_

### **ORIENTATION:**

- Explain role of CWS, IRIS, and Co-Sponsor Group
- Explain role of CS Case Manager as liaison with CS Group & IRIS Depts (Case Management, Health, Employment, Education, CORE, Legal, Office operations, Management, Board)
- Explain IRIS pocket money (a one time cash payment) and weekly grocery allocations (these continue until the family starts receiving cash assistance from DSS)
- Briefly explain R&P/Welcome Money
- Explain client's responsibility to work toward self-sufficiency
- Remind client of IOM travel loan repayment (if applicable)
- Explain importance and utility of SS card, why number must be protected
- Explain Cultural Orientation responsibility for all case members 18 years+  
*will be administered at client home by CM due to pandemic restrictions at IRIS*
- Explain American culture/laws:
  - o *Driving: must have license, insurance*
  - o *No drinking and driving*
  - o *911 emergency service*
  - o *Child safety seats*
  - o *Domestic violence*
  - o *Sending money overseas vs. saving*
  - o *Protecting privacy of information*
  - o *Marijuana laws and consequences*
  - o *Personal safety*
  - o *How to say No! Stop!*

- Explain assistance available from DSS for singles/childless couples (8 months maximum) and families (21 month lifetime maximum)
- Explain basic process for becoming permanent residents (Green Card), then citizens (5 years) *Clients may apply for their green cards on or after their 366th consecutive day in the US.*

**DOCUMENTS & SIGNATURES:**

- Co-sponsor members running the Next Calendar Day Home Visit meeting should review the R&P Forms and Timeline Cheat Sheet to determine the forms family members will be required to sign at this first meeting.
- Review **DSS Authorization for Disclosure of Information** (sign 1 for each adult)
- Review **IRIS Financial Assistance Policy** (signed by each adult). Explain R&P/welcome money and IRIS pocket money.
- Review Clients' Right and Grievances** form (sign and hand a copy to the clients)
- Introduce client to **AR-11 Form** and requirement to report address changes and assist them with completing/submitting form online within 10 days of arrival
- Assist young men age 18-25 to register for **Selective Service** (within 30 days) explain requirement to report changes of address with specific Selective Service form
- Review "Everyone is Welcome at IRIS" Document (provided to co-sponsor at time of arrival)
- Review **Statement of Mutual Rights & Responsibilities** and **Sanctions & Termination of Services Policy**
- Explain **ESOL class registration** options and complete registration
- Complete **Food bank registration** and explain access
- Explain access and complete **WIC/Diaper Bank** application(s) for your area (if applicable)

**CLIENT RACIAL IDENTIFICATION (refer to IRIS Racial Identification Guidelines Document provided by CM):**

- Do you identify as American Indian/Alaska Native, Asian, Black, Native Hawaiian or Other Pacific Islander, White, Mixed race, or other? (choose one)  
\_\_\_\_\_
- Do you identify as Hispanic, Latino or Latinx? (yes or no) [circle]
- Do you identify as being from the Middle East or North Africa? (yes or no) [circle]

**AFTER CLIENT MEETING(S) Provide IRIS Co-sponsor Case Manager with Copies of:**

**Documents in clients' possession upon arrival:**

- I-94s (if available)
- Marriage Certificate (if avail)
- Medical reports
- Department of State (PRM) letter (containing photos and biographical information)
- Passport (if avail)
- IOM Loan Promissory Note (if avail)
- School records (if avail)

**Documents/Registrations completed with assistance of co-sponsor:**

- Selective Service form** (if applicable)
- ESOL class registration in Co-sponsor Region**
- Print confirmation of **AR-11 submission** in PDF
- Food bank registration** (explain access to family)
- Diaper Bank application** (if applicable)
- WIC application** (if applicable)
- DSS Authorization to Release Information**
- Copy of DSS application** (if completed)
- IRIS Financial Assistance Policy**
- Clients' Rights and Grievances form**