

R&P Forms and Timeline Cheat Sheet

	Form/To do	Responsibility	Source	Due to CM	Notes
Pre-arrival	Review of R&P Form Completion Instructions and Case File Documentation Timeline	CS	IRIS website	N/A	Includes instructions for all forms and services listed below.
	Faith/Community Group Commitment Form	CS	IRIS Website	before arrival	Copy to CM
	IRIS MOU	CS	CM	within 24 hours	Copy to CM
	Case Notes	CS	IRIS Website (template)	Weekly	Pre-arrival & Weekly for 90 days
	Review of optional Core Services Calculator	CS	IRIS Website	N/A	To be filled out throughout R&P period
	Home Evaluation & Safety Checklist Form	CS	IRIS website	before arrival	Copy to CM
	Home Supply List Form	CS	IRIS website	before arrival	Copy to CM
Post Arrival: Completed with Clients During Next Calendar Home Visit	Next Calendar Day Home Visit Form	CS	IRIS Website	5th day	Completed in conjunction with CS Management Intake Form
	Authorization to Release Information Form	CS	IRIS Website	5th day	Completed in conjunction with CS Management Intake Form
	IRIS Photo and Interview Release Form	CS	IRIS Website	5th day	Completed in conjunction with CS Management Intake Form
	Client Contact info sheet	CS	IRIS Website	5th day	Completed in conjunction with CS Management Intake Form
Post-arrival: Client Intake Process (Completed before Co-sponsor Case Manager's first visit as outlined on CS Management Intake Form.)	R&P Co-Sponsor Management Intake Form	CS	IRIS Website	1st Week	To be completed by CM's first visit
	State Dept PRM Letter (Refugee Travel Letter)	CS	client	72 hours	Scan in color - copy to CM
	Passports from home country	CS	client	72 Hours	Scan in color - copy to CM
	DSS Authorization for Disclosure of Information	CS	IRIS Website	Before DSS application	Only used when family cannot be present at DSS and documents are urgently needed.
	DSS Online Application	CS	IRIS Training Documents "DSS Online Instructions" from CM	5th day	N/A
	IRIS Financial Assistance Policy	CS	IRIS Website/Finance	1st week	Copy to CM
	We Want Everyone to Feel Welcome at IRIS Document	CS	IRIS CM at arrival	1st week	Reviewed/no signatures required
	Client's Rights and Grievance Form	CS	IRIS Website	1st week	Copies to CM
	IOM Promissory Note	CS	client	1st week	Copy to CM
	I-94	CS	client or ask CM for directions	1st week	Copies to CM
	Pre-Arrival Medical Reports	CS	client	1st week	Copies to CM
	Marriage Certificate	CS	client	1st week	Copy to CM
	School records from home country (if available)	CS	client	1st week	Copies to CM
	AR-11	CS	Online - USCIS website	1st week	Required to be submit online within 10 days of arrival. Copy to CM
Statement of Mutual Rights and Responsibilities	CS	IRIS Website	1st week	Copy to CM	
Sanctions & Termination of Services Policy	CS	IRIS Website	1st week	Reviewed/no signatures required	
Selective Service Form (if applicable)	CS	Online - Selective Service System website	N/A	Submit online if applicable. Copy to CM	
Post-arrival: 30th-45th Day	30th Day Home Visit Form	CS	IRIS website	30th Day	Copy to CM
	Family Service Plan	CM/CS	IRIS Website/CM	Completed by 30th day	Based on interviews with CM/updated by CS.
	Second Home Visit	CM	IRIS website	45th day visit by CM	Completed before CM's second visit.
Housing	Copy of Lease Agreement	CS	CS	ASAP	As soon as housing is secured
	W9	CS	IRIS Website	ASAP	Copy to CM
	Correspondence/Application for Energy Assistance	CS	CT:Energy Assistance	ASAP	Copy to CM
ESOL/School/Local Services: (registration forms)	ESOL registration receipt	CS	Local	ASAP	Copies to CM
	Legal Assistance (if applicable)	CS	Local	ASAP	Copies to CM
	Food Pantry	CS	Local	ASAP	Copies to CM
	Diaper Bank	CS	Local	ASAP	Copies to CM
	WIC	CS	Local	ASAP	Copies to CM
	State Subsidized Child Care	CS	https://www.ctcare4kids.com/	ASAP	Copies to CM
	School Registration	CS	Local	ASAP	Copies to CM
	YMCA/Boys & Girls Club/Town Rec. programs (before & after school, summer) If Available	CS	Local	N/A	N/A
State Benefits	Benefit Approval Letter(s)	CS	client	upon receipt/ASAP	Husky insurance/TANF (or Refugee Cash Assistance)/SNAP benefits/SSI (if applicable)
	DSS and Husky Cards	CS	DSS	upon receipt/ASAP	Copy of cards to CM
Employment	Employment Assessment	CS	CM	within 30 days	Copies to CM
	Resume	CS	CS/IRIS Website template	<30 days	Copies to CM
	Employment Information Sheet Form	CS	Employment Info Sheet	after Employment	Copies to CM
	Pay stubs	CS	client	after Employment	Copies to CM (confirm with CM the number of weeks required)
Health	Refugee Health Assessment Form (RHA)	CS	CM/Healthcare Provider	ASAP	Copies to CM
	Cultural Orientation (CO) Assessment Form	CS	CM/IRIS Website	<60 days after CORE	Copy to CM
90 Day Visit	Earnings and Expenses	CS	IRIS Website	90th day	Review & Submit to CM at 90 Day Meeting