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**Sample Matching Grant Onboarding Guide**

The Matching Grant program (MG) helps refugees and other Office of Refugee Resettlement (ORR)-eligible populations overcome barriers and quickly find jobs. Since 1979, the goal of MG has been to facilitate refugee family integration and self-sufficiency through employment—by providing case management, English language training, and employment services over a 240-day service period, all without accessing cash assistance programs. The program is a public-private partnership, enabling communities to offer direct support to the program through donations, volunteer work, and mentorship.

# This Matching Grant Onboarding Guide is a framework for onboarding new staff members who will provide MG services. It is meant to be customized to include organization-specific training, allowing you to incorporate your own materials using the “Link to Agency Guidance” fields located at the end of the guide. This guide shares reading materials, recorded webinars, and other resources to complement your agency’s specific onboarding activities. The onboarding process and included activities can be modified based on each staff member’s prior experience.

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| Learn More About Who MG Serves |
| This first section provides you with an introduction to some of the Office of Refugee Resettlement (ORR)-eligible populations you may serve through Match Grant.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/) [ ]  Read: [ACF Policy Web Address](https://www.acf.hhs.gov/orr/policy)[ ]  Read: [Status and Documentation Requirements](https://www.acf.hhs.gov/orr/policy-guidance/status-and-documentation-requirements-orr-refugee-resettlement-program)  |
| 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)  |
| 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) |
| Certain Amerasians | [ ]  Read: [ORR Fact Sheet for Amerasians](https://www.acf.hhs.gov/sites/default/files/documents/orr/orr_fact_sheet_amerasian.pdf) |
| Victims of Trafficking | [ ]  Read: [ORR Fact Sheet for Victims of Trafficking](https://www.acf.hhs.gov/sites/default/files/documents/orr/orr_fact_sheet_victim_of_trafficking.pdf)[ ]  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:[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/) |

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| Matching Grant Program Guidelines |
| This section provides MG staff with information needed to provide services to MG clients and manage a caseload within the program. |
| Due Date: Completion Date: |
| MG Overview | [ ]  Read**:** [Matching Grant Overview](https://www.acf.hhs.gov/orr/programs/refugees/matching-grants)[ ]  Review: [FY20 MG Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf)*\*Note: The 2020 MG Guidelines do not account for the revised 240-day service period.* [ ]  Receive: Orientation to MG from your supervisor or your organization’s training officer | [ ]  *Discuss with your supervisor: Clarify any questions that may have come up for you while reviewing the MG Guidelines.*[ ]  *Review your local office MG site design.* [ ]  *Consult with your supervisor to clarify specifications related to the revised 240-day service period.* |
| Eligibility & Enrollment | [ ]  Discuss with your supervisor:* + Eligibility Criteria
	+ Assessment Process
	+ Enrollment Tips
	+ Enrollment Time Frames (based on immigration status)

[ ]  Review: Policy & Dear Colleague Letters Relevant to MG[ ]  Review: [Eligibility for Matching Grant Flow Chart](https://www.switchboardta.org/resource/eligibility-for-matching-grant-mg-flow-chart/)[ ]  Review internal forms: MG Rights & Responsibilities; MG Agreement Form*\*Note: Supervisor should add an organization-specific document in the designated section below.* | [ ]  *Activity: Review recent cases enrolled in MG services. Discuss with your supervisor what made these cases eligible for enrollment.* [ ]  *Discuss with your supervisor how to determine eligibility based on expected budget and anticipated match.*[ ]  *Discuss strategies for reinforcing client’s motivation and ability to become self-sufficient from first point of contact.* [ ]  *Discuss with your supervisor new policies determining eligibility for ORR populations.* |
| Regular MG Direct Services | [ ]  Review: [ORR Guidelines on Services](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) provided throughout the MG service period (pages 6-14) | [ ]  *Discuss with your supervisor: How are case management and employment services delivered in your office?*[ ]  *Discuss with your supervisor: How do MG direct service staff support MG match generation, distribution, and reporting?* [ ]  *Activity: Shadow a colleague creating a MG service plan.*[ ]  *Identify which MG services are provided in-house versus through referral.* [ ]  *Identify other local programs where clients may be eligible/walk-in and discuss process for collaboration to ensure there is no co-enrollment with these agencies (collecting other CMs, contact, communication style, etc.)*[ ]  *Compile a list of referral providers. Where should you refer clients for English language training? Where do clients go for medical appointments? Who are the primary child care providers?*  |
|  Core Maintenance | [ ]  Review: [ORR Guidelines for core maintenance](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) provided throughout the MG service period (pages 9–10)[ ]  Discuss with your supervisor: the different components that make up maintenance assistance (food, housing, transportation assistance, cash allowance, etc.) | [ ]  *Activity: Go over your office’s Direct Assistance policy with your supervisor.* [ ]  *Review your office’s cash allowance policy and practices.*[ ]  *Discuss with your supervisor: in which instances can core maintenance and/or cash allowance be reduced, withheld, or terminated?*  |
| MG Match | [ ]  Review: [Understanding, Raising, and Documenting the Match](https://www.switchboardta.org/resource/a-matching-grant-program-toolkit-and-checklists/)[ ]  Review: [ORR Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for cash match and ‘in-kind’ match (page 15-17) | [ ]  *Activity: Meet with individuals who oversee match generating activities to learn about your office’s match goals, strategy, and documentation requirements.*[ ]  *Discuss with your supervisor examples of ‘in-kind’ match. How are these donated supplies, equipment, and land valued?* [ ]  *Identify costs that are unallowable under the MG program.* |
| Client Termination | [ ]  Review:([ORR Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for guidance on MG termination policies[ ]  Read: [Ethics: Terminating Services](https://www.socialworktoday.com/news/eoe_0506.shtml)\**\*Note: These articles are meant for social workers and MSW students, but the ethics and practices are applicable to anyone who works with clients.* | [ ]  *Review your organization-specific closure letter and process.**\*Note: Supervisor should add organization-specific closure letter in the designated section below.* [ ]  *Activity: Observe a 240-day case closure. What information was covered during the closure?*[ ]  *Discuss with your supervisor sanctioning criteria and process.**\*Note: Supervisor should add organization-specific sanctioning letter in the designated section below.* [ ]  *Review a recent sanctioning.* [ ]  *Reflect: Why is appropriate client termination essential to case management? What are the steps of appropriate client termination?**\*Note: Supervisor should add an organization-specific document in the designated section below.*[ ]  *Discuss: With your supervisor, talk through sanctioning criteria and processes specific to your organization.*[ ] *Review: Discuss a recent client sanctioning process. Why did the MG staff impose sanctions? How did the client respond?*  |
| Reporting on Program Enrollments Outcomes | [ ]  Review:the processes of reporting monthly MG enrollments with your supervisor or training officer[ ]  Review:the processes of reporting monthly 180/240 reports with your supervisor or training officer[ ]  Review: the process and reporting policies for determining self-sufficiency outcomes[ ]  Review: report templates and examples of previously submitted reports  | [ ]  *Activity: Run a report and export a list of all clients enrolled in the last month.*[ ]  *Activity: Review report templates and examples of previously submitted reports.*[ ]  *Activity: examine previously submitted reports and reflect on what benchmarks were used to determine self-sufficiency outcomes.*[ ]  *Review how to indicate self-sufficiency status and make referrals when completing organization-specific case closure letters.*[ ]  *Activity: read through three completed FSSPs and reflect on what made these MG cases successful in achieving self-sufficiency.* |
| Reporting on Match | [ ]  Review:the processes for collecting records of donations provided to clients[ ]  Review:the processes for reporting for donations provided to clients | [ ]  *Activity: Practice recording donations into a designated database or organization-specific tracking system.* |

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| Employment Services |
| The following section introduces MG staff to Employment Services, establishing standards and expectations for staff providing those services to MG clients. Employment Services are required for all adults even if immediate employment is not envisioned. |
| Due Date: Completion Date: |
| Foundations for Employment Services  | [ ] Watch: [Effective Employment Services](https://www.switchboardta.org/resource/effective-employment-services/) [ ] Read: [Employment Authorization Documents](https://www.switchboardta.org/resource/employment-authorization-documents-reference-guide-for-refugee-service-providers/)[ ] Read:This [tip sheet](https://www.switchboardta.org/resource/information-for-refugees-and-asylees-about-the-form-i-9/) for facts about utilizing the I-94 form for employment[ ] 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/)For Expanded Skill Building:[ ] Watch:[This webinar](https://www.switchboardta.org/resource/webinar-helping-clients-overcome-employment-barriers/), and review [this guide](https://www.switchboardta.org/resource/info-guide-helping-clients-overcome-employment-barriers/), on helping clients overcome employment barriers[ ]  Read: [[Promoting Your Client’s Financial Wellbeing](https://www.switchboardta.org/resource/info-guide-promoting-your-clients-financial-wellbeing/)](https://www.switchboardta.org/resource/info-guide-promoting-your-clients-financial-wellbeing/) | [ ]  *Activity: Identify two documents your MG clients can use to show employment authorization at an interview.*[ ]  *Discuss two principles for fostering effective employment services.* |
| Job Readiness Training | [ ] Review:your office’s current job readiness curriculum; you can also find a [template here](https://www.switchboardta.org/resource/job-readiness-curriculum/)For Expanded Skill Building:[ ]  E-Learning: [Adult Education Principles for Refugee Job Readiness](https://www.switchboardta.org/resource/adult-education-principles-for-refugee-job-readiness/) | [ ]  *Activity: Observe a job readiness training.* |
| Job Development  | [ ] Watch: [Establishing and Maintaining Employer Partners](https://www.switchboardta.org/resource/establishing-and-maintaining-employer-partnerships/)[ ] Read:[Tips for Effective Employer Conversations](https://www.switchboardta.org/resource/4-tips-for-effective-employer-conversations/) [ ] Read: [7 Tips If You’re New to Job Development](https://www.switchboardta.org/blog/7-tips-if-youre-new-to-job-development/) | [ ]  *Activity: Ask your supervisor who your leading employer partners are.*[ ]  *Activity: Practice a mock conversation with an employer partner using the template.* |
| Employment Placement | [ ] Review:your office’s job placement process, including filling out applications, scheduling interviews, managing transportation logistics, and following up after employment placement[ ] Review: [How to Craft a Resume](https://www.switchboardta.org/blog/resume-building-for-first-time-jobseekers-tips-for-service-providers/)[ ] Read: [Answering FAQs on Creating Effective Newcomer Resumes](https://www.switchboardta.org/blog/answering-faqs-on-creating-effective-newcomer-resumes-and-using-switchboards-resume-template/)[ ] Review: [Creating High Quality Newcomer Resumes: Template](https://www.switchboardta.org/resource/creating-high-quality-newcomer-resumes-template-and-sample/)[ ] Read: [Career Support Resources—Mock Interview Guide](file:///C%3A%5CUsers%5CLizTo%5CAppData%5CLocal%5CBox%5CBox%20Edit%5CDocuments%5C37XOp_YiIk2H_OYNaZeBag%3D%3D%5C%E2%96%A1%09Learn%3A%20How%20to%20Craft%20a%20Resume)[ ] Read: [Completing Form I-9](https://www.uscis.gov/i-9-central/completing-form-i-9) | [ ]  *Activity: Review an existing MG client resume.*[ ]  *Activity: Practice filling out the I-9 Form.*[ ]  *Review MG guidelines for employer follow-up after a client is placed.*[ ]  *Discuss with your supervisor best practices for obtaining supporting employment documentation.* |
| Post-Placement Services | [ ] Review: [ORR Guidelines for Post-Placement Assistance](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf), provided after a MG client is placed in a job (page 9)[ ]  Review: documentation process for completing post-placement services | [ ]  *Practice mock post-placement calls with your supervisor to learn best practices.*[ ]  *Discuss examples of previous post-placement adjustment problems. How did your supervisor address the problems with the client? How did your supervisor resolve the problems with the client and the company in order to help the client maintain employment?*  |
| Job Upgrades & Recertifications | [ ] Review: [ORR Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for assisting clients with specialized and advanced skills (page 9, section D)[ ] Read: [Serving Jobseekers with Professional Backgrounds](https://www.switchboardta.org/blog/serving-jobseekers-with-professional-backgrounds-workforce-resources-for-clients-and-staff/)[ ] Read: [Job Counseling for Career Pathways](https://www.switchboardta.org/resource/toolkit-job-counseling-for-career-pathways/)For Expanded Skill Building:[ ] Read: [What Strategies Enhance Career Development for Newcomers?](https://www.switchboardta.org/resource/alternative-pathways-for-career-development/)[ ] Watch: [Watching and Strengthening Career Pathway Programs](https://www.switchboardta.org/resource/launching-strengthening-career-pathways-programs-approaches-partnerships-and-funding-possibilities/)  | [ ]  *Discuss with your supervisor a client success story. What job upgrade was the client pursuing? How did the Employment Specialist work with the client to obtain this job upgrade after initial placement? Did the client go through a recertification process?* |
| Supporting Women | [ ]  Watch: [Creative Strategies for Female Economic Empowerment](https://www.switchboardta.org/resource/webinar-women-work-creative-strategies-for-female-economic-empowerment/) [ ]  Listen: [Empowering Refugee Women Through Workforce Development](https://www.switchboardta.org/resource/empowering-refugee-women-through-workforce-development/) For Expanded Skill Building:[ ]  Read: [What Strategies Improve the Outcome of Refugee Women in Employment Programs](https://www.switchboardta.org/resource/what-strategies-improve-the-outcomes-of-refugee-women-in-employment-programs/)[ ]  Review: [Supporting the Career Pathways of Female Clients](https://www.switchboardta.org/resource/info-guide-supporting-the-career-pathways-of-female-clients/) | [ ]  *Discuss: What are some specific barriers women may face related to entering the workforce? What are two strategies that can be implemented when working with women in MG?*[ ]  *Review cultural backgrounds and sensitivity training material provided by your supervisor.*  |

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| Case Management Foundations |
| The following section provides an introduction to case management and establishes standards and expectations for staff providing intensive case management to MG clients. These values draw heavily from the field of social work. Although few MG staff are social workers, the services provided 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).See Switchboard’s [Sample Comprehensive Case Management Onboarding Guide](https://www.switchboardta.org/resource/sample-comprehensive-case-management-onboarding-guide/) for additional resources that may be relevant to certain MG staff roles. |
| 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 from the Code of Ethics that stood out to you and explain why they are important. How are they relevant to your work? How can you demonstrate these principles in your work?* |
| Case Management Foundations | [ ]  Review: [ORR Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for delivering MG case management (page 6)[ ]  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/) | [ ]  *Discuss: What are the three key objectives of MG case management?* [ ]  *Reflect: What are some contextual 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 Strengths-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/)[ ]  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/) | [ ]  *Review: 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 reducing these challenges?* [ ]  *Discuss with your supervisor: What internal policies does your organization have in place to develop and preserve boundaries?*  |
| Cultural Background Information | [ ]  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/)) | [ ]  *Discuss with your supervisor: Which populations will you work with most closely? What do you need to know to best serve them?* |
| Self-Sufficiency Plans | [ ] Review: [ORR Definition of Self-Sufficiency Plan](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) (page 7, section f.)[ ]  Review: Organization-specific family self-sufficiency plan[ ]  Read: [Promoting Your Clients Financial Wellbeing](https://www.switchboardta.org/resource/info-guide-promoting-your-clients-financial-wellbeing/)*\*Note: Supervisor should add an organization-specific document in the designated section below.* | [ ]  *Review a recent self-sufficiency plan developed for an enrolled MG case. What employment barriers did this self-sufficiency plan address? What strategies to remove the barriers were implemented?* [ ]  *Discuss organization-specific documentation policies and procedures.* [ ]  *Review a budgeting template.*  |
| 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)[ ]  Discuss with your supervisor: How do we effectively set employment expectations with MG clients? | [ ]  *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 Files  | [ ]  Discuss with your supervisoror training officer: how does your organization separately and securely store MG case files? [ ]  Review: your local office case file quality assurance procedure[ ]  Review: [ORR guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for required documentation related to MG processes and services (pages 6-8) [ ]  Review:Client signature policy*\*Note: Supervisor should add an organization-specific document in the designated section below.* | [ ]  *Activity: Using a local case file MG checklist, review three case files (two open cases and one closed case).*[ ]  *Activity: Locate and review translated documents relevant to your MG caseload.*[ ]  *Discuss with your supervisor: What administrative strategies allow for case file quality assurance?* |
| Case Note 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: Observe a MG activity and draft case notes based on the training you received. Make sure it contains all the information covered in the training.*[ ]  *Discuss with your supervisor: How are case notes documented for MG clients? Review all client interactions requiring case note documentation.*  |
| Case Consultations and Client Referrals | [ ]  Read: [Effective Case Consultations and Case Conference](https://www.switchboardta.org/resource/effective-case-consultations-and-case-conferences/)[ ]  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/)*\*Note: Supervisor should add an organization-specific document in the designated section below.* | [ ]  *Discuss with your supervisor the different types of referrals available for different client needs, such as mental health referrals, education referrals, domestic violence referrals, and health specialty referrals.*[ ]  *Review organization-specific client referral forms.*[ ]  *Discuss with your supervisor: how can you leverage referrals for MG clients who may have fewer dedicated services and less guidance?* |
| English Language Training (ELT) | [ ] Identify:If your office provides in-house ELT training or refers to a local provider[ ] Review: [ORR Guidelines](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf) for determining which MG clients are required to attend ELT (page 13)For Expanded Skill Building:[ ] Read:[The English Learner Family Toolkit](https://www.switchboardta.org/resource/family-toolkit/)[ ]  Watch: [Refugee Adult Education](https://www.switchboardta.org/resource/refugee-adult-education-improving-participation-partnerships-and-program-design/) | [ ]  *Activity: Observe an ELT course, either in-house or through a referring partner.*[ ]  *Discuss ELT determination protocols with your supervisor.* |
| 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) | [ ]  *Discuss with supervisor: Why is interpretation important? What are some considerations you should make when seeking interpretation for a client?*[ ]  *Shadow three interpreted meetings and/or phone calls (with consent of/permission from all involved).* |

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| RA-Specific MG Documentation  |
| The following section is intended to familiarize MG staff with the different components of MG documentation and management. Keeping timely and accurate documentation of services is a critical part of case management and may vary in different organizations. Supervisors are encouraged to incorporate organization-specific documentation for new staff onboarding in the corresponding **Link to Agency Guidance** fields. |
| Due Date: Completion Date: |
| MG Documentation | [ ]  Review:[ORR Guidelines for recommended documents](https://www.acf.hhs.gov/sites/default/files/documents/orr/MG-FY2020-Guidelines.pdf)[ ]  Review: Organization-specific MG documentation process, policy, and procedure | [ ]  *Activity: Locate all required documentation and arrange it in a case file according to SOP.*[ ]  *Activity: Review agency privacy policies and safeguards.* |
| Client Intake and Eligibility  | [ ]  Link to Agency Guidance: Eligibility Assessment[ ]  Link to Agency Guidance: Pre-Enrollment Analysis Document[ ]  Link to Agency Guidance: Client Intake Form | [ ]  *Review organization-specific eligibility assessment and identify t*hree *factors that would make a client ineligible for MG services.* [ ]  *Review sample client documentation that demonstrates eligibility across all ORR-eligible populations.*[ ]  *Activity: Practice filling out a client intake form using a case scenario.* [ ]  *Review pre-employment budget to set expectations with client.* [ ]  *Review case budget.* |
| Enrollment | [ ]  Link to Agency Guidance: Notification of pending enrollment for specific cases[ ]  Link to Agency Guidance: Client Agreement Form[ ]  Link to Agency Guidance: Rights and Responsibilities Form | [ ]  *Activity: Review client agreement form and accompanying translated documents.* |
| Financial Management  | [ ]  Link to Agency Guidance: Cash and Assistance Analysis[ ]  Link to Agency Guidance: Cash and Material Disbursement Document[ ]  Link to Agency Guidance: Case Budgeting Template | [ ]  *Review in-kind contributions and how to indicate these contributions on the disbursement document.* [ ]  *Discuss with your supervisor the importance of understanding case MG budget and how to address client expectations.* |
| Self Sufficiency Planning | [ ]  Link to Agency Guidance: Family Self-Sufficiency Plan | [ ]  *Activity: Practice filling out a self-sufficiency plan using your organization’s specific documentation. Use a case scenario for a family of four with one working individual. What barriers to employment does this individual face? How will you address these barriers and incorporate time-bound strategies?* [ ]  *Activity: Practice filling out a budget template for a family of four with one working individual.* [ ]  *Discuss:* *What are best practices when filling out a budget template with your MG client? How does this budget aid in financial literacy training?* |
| Client Support Services  | [ ]  Link to Agency Guidance: Client referral form[ ]  Link to Agency Guidance: Child care documentation [ ]  Link to Agency Guidance: Housing documentation [ ]  Link to Agency Guidance: Volunteer service records | [ ]  *Activity: Review all client support service documentation. Discuss with your supervisor strategies to ensure proper notes and documentation are captured for each MG case.*  |
| Client Monitoring and Interaction  | [ ]  Link to Agency Guidance: Documentation of regular client interaction [ ]  Link to Agency Guidance: Service Documentation | [ ]  *Activity: Review case noting policies and practices for client interactions.*  |
| Case Closure Documentation  | [ ]  Link to Agency Guidance: Self Sufficiency Status Document[ ]  Link to Agency Guidance: Employment Status Documentation[ ]  Link to Agency Guidance: Case Closure Letter  | [ ]  *Discuss with your supervisor documentation required for case closure on the 240th day.*[ ]  *Activity: Review client pay stubs indicating MG client employment.*[ ]  *Review examples of customized case close-out letters, as well as lists of available local resources.*  |
| Volunteer and Donation Reporting  | [ ]  Link to Agency Guidance:Volunteer time and attendance record[ ]  Link to Agency Guidance:Donation tracker[ ]  Link to Agency Guidance:Match contribution documentation | [ ]  *Review internal policies related to determining valuation of personal services, materials, equipment, buildings, and land.*  |
| Community Engagement and Outreach |
| Community outreach and capacity building is an important part of MG, making 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/)[ ]  Watch: [Promoting Supportive Mentoring Relationships with Newcomer Youth](https://www.switchboardta.org/resource/promoting-supportive-mentoring-relationships-with-newcomer-youth/) [ ]  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/) | [ ]  *Discuss with supervisor: What local resources are available? What community partners are you trying to establish relationships with this year?*[ ]  *Discuss with your supervisor: What outreach activities are taking place to engage all ORR-eligible populations?*[ ]  *Discuss with your supervisor: What types of community-led activities may be in service of MG (i.e., job fairs, targeted donation drives, etc.)?* [ ]  *Discuss with supervisor: What types of professional experience do volunteers have? How are volunteers recruited and how does their engagement contribute to MG?*[ ]  *Discuss with your supervisor: What type of training is recommended for volunteers? What organization policy or policies must volunteers adhere to? Who provides the direct supervisor to volunteers and how do you ensure volunteers/interns remain engaged?* [ ]  *Activity: Complete the* [*Community Resource Mapping template*](https://switchboardta.org/resource/community-resource-mapping-templates/) *after viewing the webinar. Discuss with your team as necessary.* |

We encourage you to continue learning as you progress in your role within MG. Please consult your supervisor or training officer about additional opportunities 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!

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