



Reception and Placement Program

Training Checklist – Case Manager

This checklist can be used along with an affiliate's local training materials to train new staff or provide a refresher training for existing staff. It provides links to resources and topics for discussion between staff and their supervisor. **Please log in to [MRSConnect](#) to access links.**

Connect to USCCB Resources

E-mail MRSAdmin@usccb.org	
	MRSConnect
	Resettlement Connection Newsletter
Request log-in from your supervisor	
	MRIS Database

Review USCCB Main Contacts for Your Site

Field Support Coordinator
Pre-arrival Case Manager
CO Coordinator
Housing Coordinator
Co-Sponsorship Coordinator
Discuss your site's process for reaching out to USCCB contacts (consult supervisor first, cc: supervisor, etc.)

Get to Know Your Site Details

Review your site's organizational chart
Review your site's R&P Abstract
Clarify current and upcoming arrival expectations (capacity and populations)
Review cultural backgrounders on CORE's website .

Learn R&P Program Foundations

Read the R&P Cooperative Agreement
Complete R&P E-learning Course
Identify the program's purpose and performance objectives, using these resources

Local Core Services Procedures (Review written procedures and/or shadow)

Case Verification
Housing Selection
Housing Set-up (Housing Supplies, Move-in Lease Coordination, Utility Activation)
Class A Physical and Mental Health Conditions
Interpretation Procedures
Airport Reception
Warm, culturally appropriate ready-to-eat meal
Initial Food Supply
Initial Pocket Money/Additional Pocket Money
Appropriate, Seasonal Clothing
Housing and Personal Safety Orientation
Initial Home Visit/Report
Client Intake
Service Plan
Application/Tracking of Social Security Card
Application for Cash Assistance
Application for Medical Assistance
Application for Food Stamps
Notification of Change of Address
Assistance with Enrollment in ESL
Assistance with Enrollment in Employment Services
Assistance with enrolling in/applying for all other appropriate social services
WIC (children under 5, pregnant women)
SSI (adults 65 and older, adults and children with disabilities)
Initial Health Screening
School Enrollment for School-aged Children
Selective Service Registration
30-day Home Visit/Report
Client Move within R&P Service Period
Cultural Orientation
Cultural Orientation Assessment
Transportation to Appointments
Provision of Immigration Information

Finance Procedures

Local Procedures	
	Direct Assistance per capita
	Read Local Flex Funds Policy (if applicable)
	Rent and Utility Payment Coordination
	How to request direct assistance
	Receipts and Supporting Documentation
Forms and Resources	
	Review Adult Acknowledgement of Receipt of Direct Assistance (RF-35) and Financial Record (RF-19) on the Case File Forms page of MRSConnect .
	Webinar Recording: Understanding the R&P Cash-based Model

Case File Maintenance

	Review R&P Case File Forms
	Review a case file from your site. Clarify format and structure.
	Review R&P Case File Monitoring Tool and Addendum on the Case File Forms page on MRSConnect .
	Practice using Case File Monitoring Tool with a file from your site.
	Webinar Recording: Best Practices for Writing Effective Case Notes

Migration & Refugee Information System (MRIS)

	Complete MRIS Tutorials: MRIS Introduction Video MRIS Frequently Asked Questions
	Ensure you can look up a case, review client BIODATA, locate alerts with upcoming report due dates, and find upcoming arrivals

Reporting

	E-learning Course: Improving R&P Period Report Accuracy
	Review a recent R&P report from your site
	Check with your supervisor to see if and how you will be contributing to the Quarterly Narrative Report

Processing

	Recorded Webinar: Intro to Refugee Processing
	E-learning Course: Refugee Processing
	Recorded Webinar: Family Reunification: Overview of the AOR (Affidavit of Relationship) Programs

Attached Refugee Minors

	E-learning Course: Attached Refugee Minors
	Review Reporting Requirements
	Review Minor Code Table

Case Management Strategies

	Read USCCB Case Management Manual
	Webinar recording: Guidelines and Applications for Ethical and Effective Case Management
	Webinar recording: Essential Steps of the Case Management Process

Monitoring Visits

	Review Preparing for PRM Monitoring overview.
	Review recent monitoring reports for your site if possible.

Community Sponsorship

	Read Co-Sponsorship & Support Team Explainer
	Review USCCB Co-Sponsorship Essentials Check List
	Read USCCB Co-Sponsorship MythBusters Guide