Global Refuge

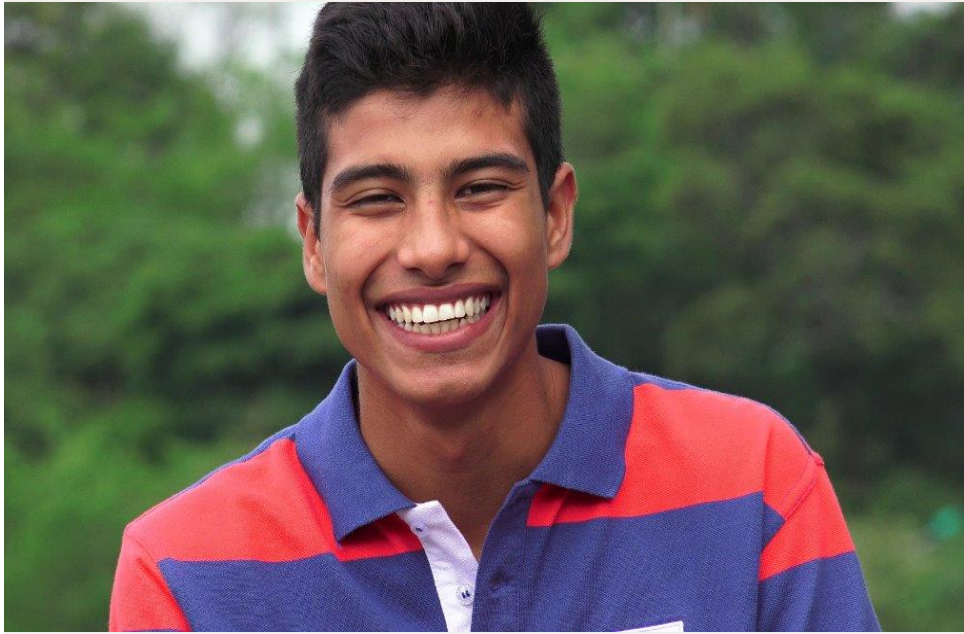
Key Position Training Series

Lead Case Manager

June 2025

Agenda

- Guide to Terms
- Job Description
- Supervision
- Oversight
- UC Program Timelines
- Stakeholder Communication/Coordination
- Reporting Requirements



Guide to Terms



- ORR – Office of Refugee Resettlement
- FFS – Federal Field Specialist
- PO – Project Officer
- CFS – Contract Field Specialist
- GDIT – General Dynamics Information Technology
- CC – Case Coordinator
- UAC – Unaccompanied Alien Child
- TFC – Transitional Foster Care
- LTFC – Long Term Foster Care
- RTC – Residential Treatment Center
- UC MAP – Manual of Procedures
- PSA – Prevention of Sexual Abuse
- PCAN – Prevention of Child Abuse and Neglect
- SWB – Safety and Well-Being
- LSP – Legal Service Provider
- KYR – Know Your Rights
- CLE – Child Level Event
- PLE – Program Level Event
- QA – Quality Assurance
- LCM – Lead Case Manager
- CM – Case Manager
- LCL – Lead Clinician
- CL – Clinician
- DUCPO – ORR's Division of Unaccompanied Children Placement Operations

Quick Links

ORR UC Policy & Procedures	**Policy breakdown by section/subject area**
ORR UC Portal	**ORR's UC case file management system**
ORR UC Manual & Procedures (UC MAP)	**Step by step breakdown on how to specifically put policy into practice**
ORR Field Guidance:	**List of guidance that is either supplemental or provides modifications to current ORR policy**
ORR Guide to UC Terms	**Supplemental document that serves as a glossary for key terms used throughout UC policy and procedures**
ORR Learning Center (OLC)	**ORR's system that houses their trainings**
ORR Resource Page	**Can locate copies of key UC documents (e.g., legal resources, sponsor application packets, and other key forms**
FAQ	**Responses to frequently asked questions that clarify existing policy, procedures or other guidance for the ORR Bureau care provider network, certain contractors, and ORR federal staff.**

Job Description

Lead Case Manager

Responsible for coordinating case management and safe and timely release services, training new case managers, and supervising the work of other case managers.

Duties:

- Reviewing cases to ensure compliance in the UAC Portal, physical file and other case management systems
- Participating in treat team collaboration
- Elevating issues to program management, Global Refuge and ORR (as appropriate)
- Communication with internal management, Global Refuge, Stakeholders and Unification Specialists
- Review transfer requests
- CLE review

Depending on each program the Lead Case Manager may also be listed as one of the programs point of contacts and they will be asked to assist in the completion of reports.

Supervision

When checking in with your team, it is important that you discuss any new policies or policy updates and ensure that this information is understood and being implemented. Ensure that this information is being sent to your team via email for them to use for future reference.

Individual check ins with each team member is helpful so you can discuss case progress and to get important updates for each case prior to holding weekly staffing.



Oversight

Deadlines

- Case Progress (family reunification)
- Data Requests
- Reports
- Timely responses to all stakeholders

Oversight

- Daily Census
- Compliance
- Overall Performance
- Audits

Overview of the Role – Case Manager Tasks

- Coordinates completion of assessments, individual service plans, and case reviews
- Transfer and release recommendations
- Coordinates discharge
- Shares relevant UC information with stakeholders in adherence with ORR's information sharing policies
- Weekly staffing with case coordinator
- Weekly check-in with minor
- Monthly home visits if the minor is placed in a foster care home
- Assess the case for potential Home Study criteria
- Travel Request
- Safety and Well-Being calls and report
- Coordination with Family Unification Specialist, if applicable
- Main point of contact for sponsor if there is no Unification Specialist assigned to the case (gathers pertinent documentation, runs background checks, etc)

Stakeholder Communication/ Coordination



Stakeholder Communication/Coordination

Global Refuge

- The Global Refuge Program Officer assigned to your program will be your primary point of contact
- Your Global Refuge Program Officer will:
  - Provide technical assistance
  - Elevate to Global Refuge Leadership as applicable
  - Elevate to ORR as applicable

ORR & Case Coordinator

- Prior to requesting guidance from ORR, or technical assistance from the Case Coordinator, care provider should check the ORR Policy Guide, the MAP, and consult with Global Refuge as needed
  - Incorporate pre-staffing
  - Include Global Refuge in all communication
  - Only include your Case Coordinator in Case Reunification email threads

Other Stakeholders

- Your Relationship with Legal Service Providers (LSPs), the Young Center, State Licensing, Community Medical Providers
  - Include FFS and Global Refuge in your communication with LSPs and the Young Center
  - Elevate to Global Refuge any concerns/barriers from working with stakeholders

Case Staffings

The case manager participates in case management staffing, with the child's assigned case coordinator and ORR/FFS on the progress in achieving a safe and timely release with family members, as well as potential challenges that may delay a release. The Child Advocate may attend case staffing, at the request of the FFS.

Case management staffing may occur monthly for children in LTFC, if they are not being considered for reunification to a sponsor.

The case manager will be the agency's point person for staffing meetings.

Lead Case Managers should be taking notes of the case staffing and follow up with case managers on the case progress.

Reporting Requirments



All Reports

Reports due to ORR:

- *UC Bed Census/Capacity Management*
- *Daily Census*
- Facility Contact List
- Facility Intake Forms
- Program Briefs
- Emergency Care Plans
- *Safety and Well-Being (SWB) Report*
- Annual PSA Data Collection Form
- Quarterly PSA Data Report
- *Child Friendly Environment Checklist*

Reports due to the Case Coordinator:

- *TKPI Trackers*

Reports due to Global Refuge:

- *Family Separation/MPP Cases*
- Case Indicators in Apricot
- Weekly Partner Capacity Spreadsheet
- Personnel Spreadsheet Updates
- *7-Day Case Management Plans*
- Foster Parent Oversight
- *Placement Denials*

And any other requests.

Reports Due to ORR



Daily Census

Key Link: ORR Daily Census Template

Daily Census:

- Daily by 9 AM ET
- FFS, CC, CFS, Global Refuge Contacts, Legal Service Providers (if applicable), DHS FOJC (if requested by DHS and/or ORR)
- Password protected spreadsheet with the following information:
  - Length of Stay
  - Name
  - A#
  - Date of Birth (DOB)
  - Gender
  - Country of Birth (COB)
  - Date of Arrival (DOA)
  - Case Manager
  - Clinician
  - Know Your Rights (KYR) Completed
  - House (applicable to Foster Care Programs only)
  - Category of Sponsor (CAT)
  - Parent Separation
  - Language

Safety and Well-Being (SWB) Call and Report

Safety and Well-Being (SWB) Call

- Completed for all minors released to a sponsor
- Determine whether the child is still residing with the sponsor, is enrolled in or attending school, is aware of upcoming court dates, and is safe
- Minimum of 3 attempts to speak with both sponsor and minor between days 30-37 following minor's discharge
  - Do not initiate calls prior to the 30-day mark

Safety and Well-Being (SWB) Report

- No later than 2:00 PM ET on the 8th of every month
  - Federal Field Specialist (FFS) may assign an earlier deadline
- UC released 2 months earlier
- FFS, CFS, Global Refuge Contacts

Key Link: SWB Report Template

CLEs and PLEs

Child Level Events (CLEs) and Program Level Events (PLEs):

- Ongoing basis, due with 4 hours or 24 hours depending on the category of the event
- Emergency CLEs and PLEs will be sent out via email, distribution list will depend on the category of the event
- Call the Global Refuge Emergency Line at (410) 226-9404 for all emergency incidents

Key Link: CLE Training

"CLEs are incidents, events and observations that affect individual children and include emergency incidents, significant incidents, behavioral notes and historical disclosures."

"PLE are situations that affect the entire care provider facility and/or children and staff within and require immediate action."

Reports due to the Case Coordinator



TKPI Tracker

Throughput Key Performance Indicators (TKPI) Tracker:

- Due the day before staffing with Case Coordinator
- FFS, CC, Global Refuge Contacts
- Access to TKPI/Tableau through the ORR App Launcher
- Limited licenses (typically QA/PSA and other supervisory role of client cases have access)



Key Link: TKPI and Tableau Office Hours

Note: This tracker is also a primary tool that can be used to track compliance.

Reports Due to the Global Refuge



7-Day Case Management Plans

7-Day Case Management:

- Sent via email on the 25th of every month for the following month
- **Can be delegated to the Program Manager/Supervisor or a Lead Case Manager**
- Global Refuge Contacts to include:
  - Global Refuge Program Officer
  - Global Refuge Senior Program Officer

Key Link: 7 Day CM Template

Other Reports

Family Separation/MPP Cases:

- Sent via email on the 5th of every month
- Global Refuge Contacts to include:
  - Willette McCurdy at Willette.Mccurdy@globalrefuge.org
  - Global Refuge Program Officer
  - Global Refuge Senior Program Officer

Key Link: Family Separation and MPP Template

Case Indicators:

- Completed in Apricot
- Following case closure for each case

Key Link: LTFC Case Indicators

TFC Case Indicators

Global Refuge

Questions & Wrap-up

FCTrainings@globalrefuge.org