Desk Card: 30-Minute Refugee Case Plan Sprint

Target Workflow: Initial Reception & Placement (R&P) Intake & Service Planning | **Designed for:** Refugee Resettlement Case Managers, Frontline Social Workers & MSW Field Interns

Rapid Implementation Brief: Pull this two-page desk card immediately prior to an initial arrival intake to pre-load Assurance biodata, run an 8-minute stabilization triage, and co-write audit-ready 90-day SMART goals with an interpreter. Every section maps directly to federal Reception and Placement (R&P) benchmarks so you can lock your case plan and DAP note before the client leaves.

PHASE 1: PRE-INTAKE & TRIAGE DECISION PATHWAY (MINUTES 0 TO 8)

Complete administrative fields from the Assurance packet 15 minutes before arrival. Use live session minutes strictly for safety verification, cultural alignment, and acute stabilization.

Triage Domain	If Condition / Risk Detected	Then Clinical / Operational Action	Document Evidence in Chart
Pre-Intake Prep	Assurance or referral packet received prior to appointment.	Pre-fill biodata, A-numbers, and family tree; book dialect-matched, gender-preferred interpreter.	"Pre-arrival biodata verified; [Language/Dialect] interpreter confirmed."
Housing & Safety	Missing heat, water, working locks, smoke detectors, or safe bedding.	Halt standard goal planning; notify housing coordinator for same-day emergency remediation.	"Housing habitability defect identified ([Issue]); urgent work order logged."
Food & Cash	Household lacks 72-hour culturally appropriate food or pocket money.	Issue emergency R&P cash stipend and provide immediate food pantry or grocery voucher access.	"Issued $[Amount] R&P stipend and 72-hour culturally appropriate food supply."

Triage Domain	If Condition / Risk Detected	Then Clinical / Operational Action	Document Evidence in Chart
Acute Medical	Client needs insulin, cardiac/BP meds, prenatal care, or urgent dental relief.	Contact refugee health clinic nurse triage for same-day prescription bridge or urgent walk-in.	"Urgent medical triage initiated with [Clinic] for [Condition/Medication]."
Child & Crisis Risk	Signs of acute psychological distress, domestic violence, trafficking, or unaccompanied minor risk.	Pause service plan; execute agency crisis protocol and mandatory safety screening immediately.	"Acute crisis indicator noted; safety protocol activated and supervisor notified."

> ⚠️ **Legal & Compliance Caveat:** Under Office of Refugee Resettlement (ORR) Reception and Placement guidelines, core housing safety checks and urgent medical referrals take statutory precedence over long-term employment planning. Never finalize a service plan without documented client consent via a qualified interpreter and signed Releases of Information (ROIs) for external partner agencies.

PHASE 2: TIME-BOXED SESSION SCRIPT & AUDIT-READY SMART GOAL BANK (MINUTES 8 TO 25)

Limit the initial Individualized Service Plan (ISP) to 3 or 4 high-priority goals covering benefits, health, language, and employment. Read each goal back through the interpreter before capturing signatures.

Resettlement Domain	Live Interpreter Prompt (Trauma-Informed)	Audit-Ready 90-Day SMART Goal Formula
Benefits & ID	"To make sure your family has healthcare and food support right away, we will apply for your IDs and benefits this week."	Client will submit applications for Social Security cards, Medicaid/RMA, and SNAP with caseworker assistance within **10 days** of arrival.
Health Screening	"Every newcomer receives a full health checkup to update vaccines and connect with a	Client and household members will complete initial Domestic Medical Screening

Resettlement Domain	Live Interpreter Prompt (Trauma-Informed)	Audit-Ready 90-Day SMART Goal Formula
	local doctor. Let us pick a morning that works."	at [Clinic Name] within **30 days** of arrival.
English (ESL)	"Learning local English helps with shopping, doctors, and work. What times of day are you available for classes?"	Client will complete ESL placement testing at [Provider Name] within **14 days** and attend at least 80% of scheduled classes through **Day 90**.
Employment	"Tell me about the work you enjoyed back home, and what kind of job feels realistic for your first few months here."	Client will complete employment intake, resume creation, and one job readiness workshop within **45 days**, pursuing placement by **Day 90**.
School Enrollment	"Let us make sure your children are registered for school and have bus routes and immunization records ready."	Head of household will complete public school registration and immunization review for all school-age minors within **14 days** of arrival.

> 💡 **Clinical Efficiency Pro-Tip:** Keep trauma history off the initial R&P service plan unless it creates an immediate barrier to housing or safety. Document observable functional needs (such as "requires ground-floor housing due to mobility limitation" or "prefers female provider") rather than speculative diagnostic labels during a 30-minute intake.

PHASE 3: 5-MINUTE LIVE SIGN-OFF & RAPID DAP NOTE BLOCK (MINUTES 25 TO 30)

Complete your verbal read-back and lock your encounter note before moving to the next appointment. Adapt the standardized DAP phrasing below directly into your client record:

- **D (Data):** Conducted 30-minute initial R&P intake and service planning session with [Client Name] and [Number] household members via [In-Person/Phone] [Language] interpreter ([Interpreter ID]). Pre-arrival biodata verified. Five-point safety check completed: housing habitable, 72-hour food supply and $[Amount] stipend confirmed, and [No acute / Urgent]

medical needs identified. Client signed privacy notice, service plan, and ROIs for [Partner Agencies].

- **A (Assessment):** Household demonstrates strong motivation for early self-sufficiency and prioritized [ESL / Employment / Healthcare] during collaborative goal setting. Immediate stabilization benchmarks are met, with primary initial barriers centered on [Language access / Public transit navigation / Credential transfer].
- **P (Plan):** (1) Domestic medical screening scheduled for [Date/Time] at [Clinic]; (2) SSA and public benefits appointment set for [Date/Time]; (3) ESL placement assessment booked for [Date/Time]; (4) Case manager to verify transit card delivery and follow up on [Date].

Supervisory & Intern Co-Sign Verification (For MSW Field Placements)

- **Prepared By (Case Manager / MSW Intern): _____ Date: _ _ _ _ _ _ _**
- **Reviewed & Co-Signed By (Clinical Supervisor): _____ Date: _ _ _ _ _ _ _**