



CATHOLIC LEGAL  
IMMIGRATION  
NETWORK, INC.

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# Agenda/Schedule

## Case Management Techniques and Strategies E-Learning Course

One of the secrets to running a successful immigration legal services program is prioritizing efficiency and organization. This allows your program to keep up with unexpected challenges, while helping as many people as possible. Let CLINIC help you prepare!

Over four weeks, this introductory-level course covers the basic components of effective case management techniques and strategies. Throughout the course, participants will learn best practices in intake procedures, case acceptance and closure, file maintenance, form creation and improvement, and much more. Participants will also learn about case management database systems, as well as strategies to create an effective case management policies and procedures manual to optimize program efficiency and minimize risk of liability.

### Schedule

**Course opens: Wednesday, May 24**

#### **Week 1: Case Management System, Database, Policies and Procedures**

Introduction to the course; what is a case management system vs a database; developing policies and procedures.

**Webinar:** Wednesday, May 31, 2-3 p.m. ET

**Instructor:** Helen Chen

#### **Week 2: Selecting and Opening Cases**

Intake procedures; case selection, scope of representation and best practices.

**Webinar:** Wednesday, June 7, 2-3 p.m. ET

**Instructor:** Caroline van der Harten

#### **Week 3: File Maintenance and Security**

File maintenance; file location, access, and security; case tracking/tickler system and case notes; file retention/destruction.

**Webinar:** Wednesday, June 14, 2-3 p.m. ET

**Instructor:** Silvana Arista

#### **Week 4: Closing Cases and Standardizing Communications**

Best practices and protocols; case closing letters, data tracking and record keeping; client survey and grievance procedures; large scale delivery models.

**Webinar:** Wednesday, June 21, 2-3 p.m. ET

**Instructor:** Dee Dee Gullo

**Deadline for completion of course requirements: Wednesday, July 5**

**Course closes: Wednesday, July 19**