

## BEST PRACTICES TOOLKIT

*Comprehensive Guide to Remote Citizenship Services*

LESSONS FROM THE NEW AMERICANS CAMPAIGN VIRTUAL REVIEW PILOT

### ***Best Practices***

Best practices are operating processes that produce consistently better results than other techniques. We glean best practices from the good practices of frontline organizations and leaders, and improve them through reflection, feedback, and experimentation. Best practices may be born through the efforts of one community and transformed when they are adopted by others in a new context, but the underlying understanding of their utility remains constant and is always measured against desired results.

### ***About This Series***

Identifying and spreading best practices requires a learning network for peer-to-peer exchanges of ideas. This toolkit series serves as one mechanism for us to share and build on best practices.

### ***About This Toolkit***

The New Americans Campaign (Campaign or NAC) is invested in increasing the number of legally qualified permanent residents who take the critical step of becoming American citizens. One way the Campaign has expanded is by developing a replicable model for mobilizing lawful permanent residents (LPRs) to apply for naturalization outside of the traditional group processing model. This toolkit describes the tips and best practices shared by Campaign partners that participated in the Virtual Review Pilot Program between 2018 and 2020. The goal of this toolkit is to guide organizations interested in providing or expanding their remote legal services, create ongoing dialogue among organizations engaged in remote review services, and provide efficient, quality legal services to diverse LPR communities.

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## INTRODUCTION

This comprehensive guide draws from the experience of several New Americans Campaign (NAC or Campaign) partners participating in the NAC's Virtual Review Pilot including: Asian Americans Advancing Justice - LA, Boat People SOS - Houston, GMHC in New York, and IRC - Atlanta. The Pilot seeks to expand the reach of the NAC by developing a replicable model for mobilizing lawful permanent residents (LPRs) to apply for naturalization outside of the traditional group processing model. Asian Americans Advancing Justice - LA (Advancing Justice - LA) served as the primary remote review partner and is the primary author of this guide.

The NAC created this guide to share the processes and recommendations of remote review partners based on the collective learnings of campaign partners over the course of this Pilot. The appendix section of this guide includes a variety of sample documents and tools for organizations to use and modify as needed. Although each remote services program is unique, additional organizations can benefit from and build on these resources--especially as additional partners launch their own remote naturalization services or grow existing programs in response to the 2020 global pandemic.

## BACKGROUND

### I. Overview of New Americans Campaign Pilot

The NAC Virtual Review Pilot assists LPRs through the citizenship application process remotely using the online tool Citizenshipworks with the goal of increasing access to legal services nationally. All partner organizations participating in the NAC Pilot have developed unique strategies to provide remote citizenship services to LPRs and work in close partnership with the Immigrant Legal Resource Center (ILRC) and the Immigration Advocates Network (IAN) that created Citizenshipworks in developing their strategies.

Pilot partner organizations sourced and assisted applicants routed to Citizenshipworks from advertising campaigns on social media, through collaborations with community-based organizations (CBOs), and referrals from Citizenshipworks of DIY applicants who find their own way to the platform. For some of the pilot partners, outreach strategies evolved based on applicant responsiveness, capacity, and community need. For instance, Advancing Justice - LA initially focused on assisting applicants routed to Citizenshipworks through a national digital communications campaign, but shifted their strategy to focus on collaborations with non-legal partners like libraries and community-based organizations (CBOs). These collaborations helped strengthen the quality of referrals and helped build trust with out-of-state applicants who were unfamiliar with their organization.

The remote services offered as part of this Pilot by and large mirror the services offered in a traditional in-person model and include: answering citizenship questions, N-400 application completion, legal review of a completed application, providing self-filing instructions, and assessing fee waiver eligibility and forms assistance. Pilot partners tended to prioritize applicants who had completed 90 percent or more of their applications and had red flags (i.e., potential legal issues requiring follow-up), indicating a need and readiness for legal review. Some partners found that applicants would benefit from earlier interventions to address citizenship eligibility issues and fee waiver questions and responded by engaging with applicants who had created accounts on Citizenshipworks regardless of completion rate and also fielded questions from those who had contacted the Citizenshipworks team with specific legal questions. The hope was that engaging these applicants who had just started the process would motivate them to progress through their applications.

Pilot partners found that the majority of applicants who intend to be DIY, did not progress through the naturalization application on their own and needed legal support to finalize the process. They addressed a wide range of applicant questions, from basic naturalization process questions to those requiring legal research on how certain negative history could raise deportability and good moral character issues. Collectively, pilot partners assisted hundreds of applicants throughout the United States and in multiple languages, including English, Spanish, Chinese, Thai, Tagalog, and Vietnamese.

## II. Insights + Lessons Learned

Through direct services and interactions with applicants, pilot partners have gleaned valuable insights about remote citizenship services. Many early learnings come from the recognition that providing a remote service traditionally offered in-person comes with a trust gap for both parties. LPRs may be skeptical of a free or low cost service or an organization they have never heard of or legal assistance from someone they have never met, particularly without a trusted, local organization facilitating the referral. Service providers may be accustomed to sussing out client information in person where the process of establishing rapport and exchanging information and documents is more straightforward. This gap in trust can be filled or narrowed by use of video, as well as by sharing your organization's expertise, your professional competence, and other key information about the program in clear and accessible language.

Below are some of our collective insights from the Pilot:

### TRUST

- Importance of **building trust** with remote applicants, both to agree to services and to share personal history affecting citizenship eligibility, especially in today's climate
- Case complexity may only be revealed during legal review or after applicant establishes a **trusted relationship** with an advocatevelop a user-friendly service plan that takes into consideration applicants' needs and ease of use (such as easy opt-ins), as well as required staff actions and support systems

### COMMUNICATION

- Value of **clear messaging** about your organization and your program services and staff, that conveys trust and availability of free legal services
- **Prompt follow-up** with motivated applicants can provide the support they need to finalize the application process
- Use **different modes of technology** to engage and communicate with applicants who may have varying access to and comfort with technology; video calls also help build trust
- Some applicants opt in to services seeking specific information but become **unresponsive because they are simply not ready** to move forward with the naturalization process

### TECHNOLOGY

- **Family support** can help bridge applicant discomfort with technology tools to make remote services a possibility
- Creating a **training tool** such as a powerpoint presentation to guide volunteers and applicants through the Citizenshipworks portal and application helps address discomfort with new technology

### SERVICE

- Develop a **user-friendly service plan** that takes into consideration applicants' needs and ease of use (such as easy opt-ins), as well as required staff actions and support systems
- Have a **clear plan for follow-up** for all stages of naturalization assistance
- **Develop relationships** with legal partners in other states for referrals and technical assistance on state law issues and USCIS local office adjudication practices
- Applicants unable to find local assistance due to need for **in-language services or complex issues motivated** to make remote services work even with barriers
- Applicants with near-complete applications often still require **significant follow-up**
- Applicants appreciate **staff availability** outside of regular business hours and convenience of receiving services at home

## WHY REMOTE REVIEW SERVICES?

Remote review services allow programs to leverage limited legal capacity by creating efficiencies in services — engaging motivated applicants to complete most of the application themselves, partnering with CBO staff to support with application completion before referring applicants for legal review, and eliminating applicant and staff travel time for services, for example. Organizations that offer robust in-person naturalization assistance services may also be looking for ways to expand access to legal services in remote or otherwise underserved areas. Offering remote citizenship services also allows programs to continue to serve their clients in instances where hosting naturalization workshops or providing in-person citizenship services is not feasible.

In light of the coronavirus pandemic, which has profoundly impacted the way most organizations operate and provide services to their communities, the value of remote services is even more evident. Across the board, NAC partners are fundamentally having to shift the way they are providing services at a very critical time. Some are converting their lobbies into citizenship kiosks, while others are experimenting with small virtual workshops. Organizations like Advancing Justice - LA have shifted all of their services to a remote workflow, including their weekly clinic during which they are keeping appointment schedules and assisting applicants by telephone or via video conferencing. IRC - Atlanta and BPSOS - Houston began running Facebook ads and boosted posts to promote their remote citizenship services.

Nonetheless, shifting a complex, multi-layered in-person service to a remote service model that can involve several staff and/or volunteers and technologies is a significant undertaking. Reviewing the recommended tools, resources, and best practices in this guide is a great place to start.

## TOOLS + RESOURCES

Starting remote review services at your organization does not require expensive, complex tools. Make sure you have a game plan with certain tools in place before assisting applicants remotely. Here are the basics:

### I. Service Blueprint

A service blueprint helps design or improve a seamless service process for staff and users by visualizing each step, actor, technology, and support process required to deliver the service you promised your client. Redesigning a traditional in-person service model, such as naturalization workshops or office consultations, to a remote service model requires first documenting each step an LPR would take in completing their naturalization application with your organization, and for each step determining the actions, support processes, and enabling technologies required for the LPR to move along each step of the way.

This user-friendly service plan has five main components:

#### (1) CONTACT POINT

*What the LPR comes in contact with such as a computer or phone*

#### (2) LPR ACTION

*What the LPR does during the service experience, such as: creates a Citizenshipworks account, opts-in to service, signs the N-400, etc.*

#### (3) FRONTSTAGE

*What the LPR sees and who or what technology they interact with;  
What your staff or volunteers do that is visible to the LPR*

#### (4) BACKSTAGE

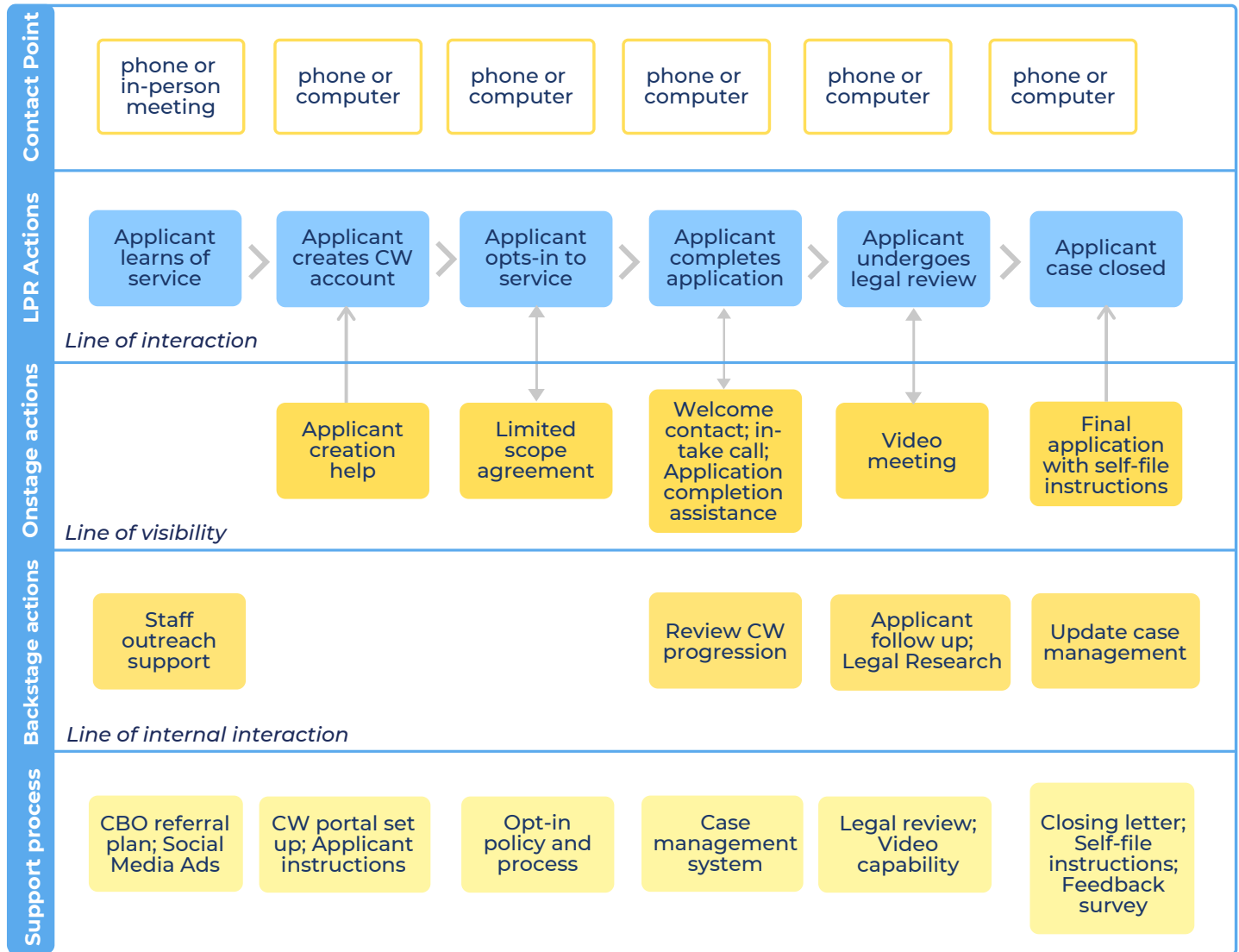
*All other staff or volunteer actions and preparations LPR does not see but are required to deliver the frontstage action*

#### (5) SUPPORT PROCESSES

*The internal or third-party activities that support the staff and volunteers directly serving the LPR, such as developing a required policy*

A service blueprint visualizes your organization's service processes while also taking into account the LPR's experience, and all the staff actions, technology, and support processes. This diagramming makes it easier to design a new process or improve an existing one. Advancing Justice - LA used Google Docs to build a service blueprint. High-tech solutions like [Lucidchart](#) or low-tech solutions like taking a picture of a hand drawn chart or post-it notes also work.

## Sample Service Blueprint



A service blueprint diagram visually maps out the steps an LPR takes in receiving remote citizenship services.

## II. Citizenshipworks

[Citizenshipworks](#) is a free online tool that guides LPRs through the citizenship application in plain language. It is available in English, Spanish, and Chinese. Applicants can use a computer or mobile device to access the platform. They must first complete a pre-screening to establish basic eligibility for naturalization before they can create an account and work on their application. Instead of completing the N-400 application form directly, applicants answer a series of questions and the responses fill out the form. Applicants whose responses do not trigger any "red flags" (indicating potential eligibility issues) can generate and print an application to mail to USCIS. If they have questions or trigger red flags, Citizenshipworks staff can route applicants to appropriate legal partners for assistance.

## Key Benefit of Citizenshipworks

- ✓ Helps applicants **understand** the application and naturalization process
- ✓ Applicants can work on the application on their own and **at their own pace**
- ✓ Applicants can **easily communicate** with staff through the platform to address questions or issues as they work on their applications
- ✓ **Red flags** for answers that require legal review and advice
- ✓ **Saves advocates time** by allowing applicants to complete their own applications
- ✓ Saves legal staff time as interns and non-legal staff can check application entries for completion before scheduling for legal review
- ✓ Applicant and advocate can **securely interact** with each other through the platform via message, chat, and virtual review (video chat) functions
- ✓ Advocates can **view and make edits** to application directly during legal review process
- ✓ **Shared access** to most current version of application

Campaign partners can become a Citizenshipworks partner and create a unique portal page for free. A standard “partner portal” provides basic information about your organization and follows a standard template. A “campaign portal” allows for more customization, including detailed information about your program and services. It also allows multiple organizations to share access to the applicants enrolled with the designated campaign and to refer applicants to other organizations within the Citizenshipworks network. For instance, Advancing Justice - LA has a [campaign portal](#) that they customized and use in connection with the NAC digital communications campaign. The campaign portal allows Advancing Justice - LA to refer Citizenshipworks applicants to other participating NAC partners. GMHC, on the other hand, uses a portal page because their service model does not include applicant referrals to other NAC partners. All their remote review applicants, including those sourced by various CBO partners and Citizenshipworks, are directed to start their application process on the portal page. Other partners like BPSOS use both campaign and portal pages to promote citizenship services in their community and to streamline monthly workshops.

Either of these portals can be shared with potential applicants and other CBO partners as you promote your naturalization services. Applicants who access Citizenshipworks through your portal and create an account are directly linked to your organization, and staff with advocate accounts can immediately access their applications. Citizenshipworks staff provide training and technical support for your team as you create and navigate the portal and begin assisting clients.

Here are some ways that NAC pilot partners have customized their Citizenshipworks partner portal:

- Describe program and specific services provided
- Introduce staff providing remote review services
- Orientation video to familiarize applicants with organization and what to expect during the process (limited to campaign portals)
- Testimonials from satisfied remote review clients
- Incorporate the organization's limited scope agreement into the portal like IRC - Atlanta's and include it as part of the Citizenshipworks account creation process (if allowed by your organization).



## III. Computer with Internet Access

You can access Citizenshipworks with any up-to-date web browser but it works best with Google Chrome and Mozilla Firefox. Applicants can navigate their accounts from mobile devices or computers. Advocates should use a desktop computer or laptop when reviewing applications and interacting with applicants, especially when making direct edits to the forms. Having stable internet access is also a critical component to building trust as it creates the opportunity for a productive interaction, allowing advocates and applicants to communicate effectively using the tools in this section.

## IV. Video Camera

Video conferencing is a valuable tool when establishing trust and rapport with the applicants. While some practitioners provide remote legal services solely via telephone and email correspondence, our experience is that communication via video conferencing for legal consultations and legal review appointments are ideal. At least one consultation, preferably the legal review of a completed application, should be done via video conference so the participants can communicate face-to-face. In addition to the integrated Citizenshipworks video chat tool, Zoom, Google Hangouts, and other similar free or low-cost tools are available, discussed in more detail in Part IX below.

## V. Legal Case Management System

Many legal organizations already have established case management systems to manage clients' cases. Whether you use a simple system with spreadsheets or sophisticated software, it is important to have a process that allows you to keep track of multiple clients' cases and their progress.

Several pilot partners have developed their own case tracking spreadsheet in addition to using their existing case management software. For instance, IRC - Atlanta uses a spreadsheet to capture each applicant that enrolls through their campaign portal and to record each interaction and method of contact. Interns and non-legal staff are responsible for applicant follow-up and will generally make multiple attempts at regular intervals to contact applicants and utilize messaging templates whenever possible. They will note the method of contact as well as the date and outcome of each interaction on the spreadsheet (e.g., "left voicemail," "spoke to client but client not ready," "client declined services." Advancing Justice - LA has included a sample of their case tracking sheet in the Appendix that can be modified to meet your organization's needs.

Even with limited scope services, there may be delays in completing services and closing out cases. Applicants often need time to gather information and documents, causing delays and deviations from the standard workflow. It is important to note the date on which applicants are instructed to gather additional information and/or to make application corrections, for instance, so that staff can follow-up within an appropriate window. All organizations providing remote services should have a system so that each advocate involved in providing applicant services can access case notes and a system for internal reminders to ensure effective case management.

## VI. Limited Scope Service Agreement

The agreement can be a simple one page document in plain language that describes the services that the applicant will receive and lays out the roles and responsibilities of the applicant and the service provider. It should state clearly that your organization is not providing representation and also that the applicant is responsible for providing reliable, accurate information. It is important to reiterate in the agreement and during conversations that the applicant must be honest and forthcoming during any consultation as failure to reveal material information could have serious immigration and sometimes criminal consequences. A sample agreement in English and Spanish is included in the Appendix.

Note that your limited scope agreement can be incorporated electronically into the Citizenshipworks opt-in process, which is a feature that IRC - Atlanta utilizes. Their portal has a pop-up screen that the applicant user has to agree to before continuing on the platform. However, staff should not rely on this process alone and set client expectations at the earliest interactions and reinforce understanding of the terms by reviewing them verbally. The text that displayed to Citizenshipworks users that enroll with IRC - Atlanta is included in the Appendix.

## VII. Applicant Instructions

Whether you are doing your own outreach or partnering with other organizations to promote your remote review services and connect with LPRs, creating written materials can be very helpful. Step-by-step instructions with visuals can help LPR applicants navigate different steps in the application assistance process and minimize staff time spent on explaining and re-explaining basic instructions. Sample documents are included in the Appendix:

- Citizenshipworks account creation guide
- Accessing Citizenshipworks' integrated video chat tool (or other back-up video conference platform) for legal review
- Self-filing instructions with self-study resources

## VIII. Legal Review Guidelines

Written guidelines for legal review of completed applications can help standardize the process for staff and applicants and ensure that common issues are addressed during this critical step. While applicants are responsible for providing accurate information, the legal review process should verify they meet all eligibility criteria, confirm key information, and ensure that they have disclosed material information properly. Important issue areas to review and confirm through established guidelines for staff include: how the applicant obtained LPR status and other immigration history, taxes, travel, criminal history, Selective Service and good moral character issues. For additional guidance on the legal review process, refer to the Remote Review Model discussion below.

## IX. Optional Tools

Below are additional tools that Advancing Justice - LA has explored to help address delays and other challenges:

- An [electronic agreement signature tool](#) (e.g., DocuSign, SignNow) allows applicants to sign the service agreement electronically without the need for printing and physically returning the document. At the initial pilot stage, Advancing Justice - LA emailed applicants the agreement as a PDF after the intake call where they explained its terms. Even though applicants confirmed understanding and verbally agreed to the terms, Advancing Justice - LA found that the extra step of having them print, sign and email or fax the document back caused delays and confusion. Once they incorporated the e-signature tool into our workflow, the process of securing a signed service agreement went much more smoothly and quickly. The tool that Advancing Justice - LA used is fairly intuitive for almost all of our applicants, reducing the time spent explaining how to access and sign the electronic agreement.
- An [online appointment scheduling tool](#) (e.g., Calendly, Appointlet) can minimize back and forth when scheduling initial intake calls or legal review appointments. It allows staff to set available appointment slots and share them via a link in an email or on a website. Once an applicant makes a selection, that time is blocked off on the advocate's calendar and no longer available as an option for other applicants.

This tool can minimize staff time spent on multiple follow-up attempts and streamline appointment scheduling. Applicants may also be more inclined to follow through with communications and services if they commit to a set appointment time early on in the process. For example, GMHC uses Calendly to reduce the administrative burden of scheduling consultations for applicants in different time zones and with the constantly changing schedules of both applicants and advocates alike. Applicants are asked to choose a time slot that works best for them from this calendar and when selected, the appointment is immediately calendared for both advocate and applicant: <https://calendly.com/vishalt-1>. If needed, referral partners can help their applicants select a time.

- A **text messaging/SMS platform** can create flexibility and improve efficiency with client communications. Advancing Justice - LA currently utilizes an integrated texting tool through Vonage, a cloud-based telephone system and found that applicants who were initially unresponsive to email or phone promptly responded to text messages. BPSOS uses Google Voice which allows for texting and for applicants to call and leave voicemails. IRC - Atlanta uses WhatsApp to text with their applicants. While applicants' contact method preferences may vary, IRC - Atlanta staff have found texting to be the most useful way to communicate with clients as many times calls go to voicemail and emails are easily overlooked. Their staff will follow-up with a confirmation text message after a phone call and will also utilize texting for simple questions to applicants.

Many applicants expressed that they appreciate flexibility with communications — some could not easily answer phone calls during the workday, some did not answer calls from unfamiliar phone numbers, and others did not frequently check their email accounts. Text messaging allows advocates to communicate with many of them and schedule calls at convenient times, sometimes after work hours.

- While Citizenshipworks has a useful integrated video chat feature, an **alternate video conferencing platform** can be helpful. Some applicants may have difficulty accessing the integrated tool and programs may want a back-up option for legal review or other important conversations. Alternate video conferencing tools like Zoom are optimized for mobile phone use and also have screen-sharing features so the applicant and advocate can look at the same section of the application during legal review, for instance. The screen-sharing function reduces staff time fixing typographical and other errors on the application on the backend because the applicant is able to point them out during the legal review process. NAC partners have also found the break-out room function of Zoom helpful in simulating a workshop setting.

## PLANNING CONSIDERATIONS

### I. Staffing Model

The appropriate staffing model for an organization's remote review services will depend on available resources, staff capacity, and the needs of the local community. Staffing decisions should also take into account the language capacity and immigration experience and knowledge of program staff, as well as funding priorities. In most scenarios, programs will have attorneys work at the top of their license, maximizing their time for legal consultations and legal review of completed applications. Non-legal staff can help address applicants' basic naturalization questions and provide application assistance to prepare applicants for legal review with legal staff. All pilot partners also benefit greatly from the Citizenshipworks team as they readily provide technical assistance and support with the platform as advocates assist clients.

Here are some staffing considerations as you develop the model that works for your organization:

- A **case manager model** employs non-legal staff to handle initial stages of interaction with applicants, including intake and basic application assistance, before legal staff provides legal review assistance. IRC - Atlanta uses interns and non-legal staff to support applicants as they create accounts and navigate Citizenshipworks to complete and print their applications. Under this model, legal staff would also be available for eligibility consultations and provide support as needed to non-legal staff. The case manager could also provide administrative support when finalizing and closing out applicants' cases. Programs with DOJ accredited representatives can access this staffing model and rely on interns, volunteers, and non-legal staff for additional support.
- **Department of Justice (DOJ) accredited representatives** can provide legal support for remote services. Relying on DOJ accredited representatives in remote review capacities is exciting because it makes the staffing model more accessible to a larger number of programs, both within the NAC and beyond.

- **Case assignments by language** utilize legal and non-legal staff alike for applicant follow-up, assigning cases to staff who are proficient in the applicant’s preferred language. The assigned staff is the primary contact for the applicant and provides application assistance and ultimately resolves applicants’ cases under attorney supervision, if needed. This approach can maximize the cultural and linguistic capacity of individual staff.
- **Outreach staff** can identify and build relationships with local CBOs that serve lawful permanent residents but may not provide citizenship assistance or lack capacity to provide legal support to applicants. Partner CBOs can directly refer community members seeking services or screen cases and/or provide some level of application assistance before referring applicants for legal review.

## II. Scope of Services

A critical piece of the planning process should include drafting a clear description of available naturalization services and any limitations on these services. These limitations may relate to an applicant’s state of residence, substantive law, or some other criteria. Unless defined or dictated by a specific grant, remote review services can include basic naturalization support, application completion assistance, document review to legal review of completed applications. Some programs may offer application assistance virtually, while others may limit assistance to applicants that have completed more than 90% or more of their applications on Citizenshipworks. Clearly defining these services will promote consistency in service provision as well as data tracking and reporting.

Sample Planning Questions	
1.	How will we address fee waiver eligibility and assistance? (See <i>Additional Items to Consider</i> below for more information on fee waiver assistance)
2.	How will we handle complex naturalization cases?
3.	How will we handle complex cases based on state law issues outside of our jurisdiction?
4.	In what specific scenarios should we refer out cases?
5.	What is the referral process for applicants?
6.	What are the parameters of family involvement with remote services (e.g., when the primary applicant is not comfortable with technology)?

During the Pilot, Advancing Justice - LA consulted on many complex cases. Often, applicants who were referred to them with near-complete applications on Citizenshipworks had complex issues that were not revealed until legal review. Seemingly straightforward cases often required significant follow-up by their staff, including assistance with Freedom of Information Act (FOIA) requests for relevant immigration history and obtaining old out-of-state conviction records. Although not all programs will have the capacity and ability to assist with complex cases remotely, their staff did their best to assist applicants with all case types, especially those without viable options for assistance locally. Collaboration with NAC partner organizations in different regions provide an avenue for technical assistance so that advocates can fully advise and resolve cases for clients with legal issues in states outside of the organization’s practice jurisdiction.

## III. Building Trust

In developing a new remote review practice, you will have to revisit existing processes and expectations, especially if your program's experience is limited to in-person naturalization services at an established organization. By way of example, Advancing Justice - LA is trusted in their local community for naturalization assistance and have strong word-of-mouth referrals from satisfied clients, so they did not fully appreciate at the outset that applicants who were routed to Citizenshipworks through a digital ad campaign on Facebook and then referred to them for legal help may be reluctant to receive their services. Applicants who were out-of-state and unfamiliar with the technology seemed the most hesitant to move forward with remote services, often preferring referrals to in-person assistance.

In response, Advancing Justice - LA initially focused on simplifying their mass email and text messaging language. Early interactions with applicants who had opted in to services also revealed that they needed to share information about our services in simple and concrete terms and also share information about their remote services team and organization to help build trust. For example, instead of referring to legal review, citizenship assistance, or legal services generally, they listed the specific services provided: answering citizenship questions, helping complete citizenship applications, reviewing completed applications, explaining how to file applications, and providing fee waiver information and helping complete the fee waiver request form. They also included biographies and photographs of staff providing remote services on a dedicated landing page.

Establishing referral partnerships with CBOs that are rooted in their local communities also proved to be key for building trust with applicants. These partners enhance the pilot partners' outreach efforts because they are already trusted by eligible-to-naturalize LPRs in their local communities. CBO referral partners might also play a key role in providing applicants access to technology and support as they start the application process, serving as a critical bridge to a remote legal partner's services. A model for this type of collaboration is included later in this guide.

At GMHC, the Citizenshipworks team and any of their referral partners introduce GMHC to applicants as a trusted nonprofit immigration legal service provider in New York that is serving citizenship applicants nationwide. This introduction helps establish their credibility with the unfamiliar applicant. Also, at the start of each phone or video consultation, staff emphasize confidentiality, explaining that everything the applicant shares is legally privileged information and that it is in their best interests to be completely honest.

### Ideas to Help Establish Credibility with Remote Applicants

- ✓ A specific [landing page](#) on your organization's website to provide easy access to information about remove review program staff and organization
- ✓ [Toll-free number](#) for prospective applicants to contact your organization directly with questions before enrolling through Citizenshipworks
- ✓ [Customized Citizenshipworks partner portal](#) describing services with embedded [orientation video](#) of case manager introducing services and process
- ✓ Utilize [talking points and scripts](#) to describe tangible benefits and services

Next, the process for applicants to opt-in to legal services should be as simple as possible (see Limited Scope Service Agreement section above). The more steps there are to secure applicants' permissions for legal referrals and services, the more likely that they may not continue with the process. Those already hesitant about technology and engaging with unfamiliar organizations may be especially skeptical of remote legal services. Advancing Justice - LA found that simplifying their messaging to individual applicants who had opted in to their services and omitting references to the intake process and service agreement in the initial welcome correspondence reduced skepticism. Instead, Advancing Justice - LA focused on meeting applicants where they are in the process and scheduling a phone call to address questions and next steps.

Once an applicant agrees to services and communications are ongoing, here are other ways to continue building trust and facilitate open communications during the entire process:

- Share the role of NAC and our trusted nonprofit network
- Emphasize free services and motivations and goals behind services
- Use video conferencing for important conversations
- Explain and reiterate client confidentiality and attorney-client privilege
- Be mindful of your workspace and surroundings to ensure what applicants can see and hear during the interaction build trust and convey professionalism
- Confirm applicant and advocate have access to quiet area away from others to minimize distractions and promote a sense of privacy and confidentiality
- Prompt communications and follow-up on any action items

Keep in mind that while remote legal services are distinct from traditional in-person naturalization services, programs should incorporate the same ethical safeguards into their practice. For instance, good client communications and preserving client confidentiality are key concerns. Nonetheless, policies and procedures should take into account the unique challenges of attorney-client communications in a remote services setting, especially when applicants are new to your organization and may be hesitant to disclose sensitive matters. For instance, focus on tools and procedures that help build rapport and trust with applicants even without the benefit of in-person communications. In today's environment, it is particularly important to take precautions in providing remote, limited scope services, when denials and disclosures during the citizenship application process can have very serious consequences such as deportation.

These considerations should not be deterrents for incorporating remote legal services into your practice, but an opportunity to think through and modify existing practices to make sure they fit the new model. Throughout this guide, you will find suggestions on how to adjust processes to optimize client services in this setting.

## **IV. Working with Community Based Organizations & Other Non-legal Partners**

As discussed above, partnerships with CBOs and other non-legal organizations can be very effective outreach and referral tools. They can help your organization establish credibility and build trust in local communities outside of your regular service area as well as develop robust referral pipelines. When working with outside organizations to serve their community members, you will need to create additional protocols to make sure that staff do not share any unauthorized client information without the client's written consent. In scenarios where CBO staff provides joint assistance to the applicant, you should consider whether it makes sense for the client to sign a release for information sharing between partners related to the client's case. However, unless the third party is necessary to the client's legal assistance, it is generally a best practice to firewall client information from any individuals outside of the organization.

Please see the Sample Remote Review Models section that follows for a sample CBO referral model and a sample Citizenship Class referral model. Here are examples of two successful partnerships with our pilot partners:

1. GMHC: The Literacy Volunteers of the Eastern Panhandle (LVEP) in Ranson, WV provides application assistance and English and Civic preparation to applicants seeking Naturalization. LVEP collaborates with GMHC by providing referrals to GMHC for those applicants who may need a legal review due to red flag(s), those who have eligibility questions or those who wish a legal review. Staff at LVEP ensure that applications are complete and applicants have supporting documentation for their legal review. LVEP staff is also trained in screening for fee waiver eligibility and assist potential applicants in gathering supporting documentation.
2. At the start of the pandemic, Advancing Justice - LA connected with Immigrant Welcome Center (IWC), a NAC affiliate based in Indianapolis, Indiana. The Citizenshipworks team facilitated the introduction because IWC needed a legal partner to help community members they were already supporting with the naturalization process and Advancing Justice - LA was looking to expand referral partnerships to help build trust with community members outside of their immediate service area. Within weeks of establishing the referral workflow, IWC proved to be a trusted source of referrals. The applicants that they refer to Advancing Justice - LA are motivated and ready to finalize their citizenship applications — they already understand the services and process, do not express any hesitation about receiving remote services from an out-of-state organization, and are responsive throughout the process. This experience has confirmed the theory that referral partnerships are key to serving applicants effectively and remotely in different states. Note that when applicants are referred to Advancing Justice - LA and they opt-in to services, they become their legal clients and staff do not share back any client-specific information to IWC without prior written authorization.

### V. Unauthorized Practice of Immigration Law

There are two concerns regarding the unauthorized practice of immigration law (UPIL) that are applicable in virtual legal services setting: (1) legal staff providing legal assistance to clients outside of their own state and/or on out-of-state matters; and (2) non-legal staff providing legal services in violation of the law. While this guide is not a comprehensive resource regarding UPIL and a complete explanation of the law, this discussion is meant to flag these important considerations as you plan your services.

Regarding the first issue, it is generally settled law that legal practitioners can advise out-of-state clients on federal immigration law. Nevertheless, each state has different rules and regulations governing the practice of law, so it is critical that you confirm your state's rules with an expert and also confirm your coverage with your malpractice insurance provider. The complex piece is addressing how your program will handle any out-of-state issues that arise in the context of assisting an applicant with their primary citizenship case. For instance, many applicants have state criminal convictions that may affect their citizenship eligibility, and your program should have a concrete plan as to how these issues will be addressed when assisting diverse applicants. This element is also relevant to the planning discussion above regarding scope of services.

As for the second form of UPIL, it occurs in the naturalization context when someone other than an attorney or DOJ accredited representative provides immigration legal services. Examples of the unauthorized practice of law include telling someone that they can or cannot apply for naturalization or explaining how to complete a specific section of the application based on the applicant's specific situation. This unauthorized practice can lead to criminal consequences as well as serious liability issues for your organization. Only attorneys and accredited representatives should advise individuals on how to proceed with the naturalization process based on each applicant's particular situation. Support staff can provide legal information as long as they are knowledgeable about the law and do not suggest a course of action. A general tip for support staff: You should not answer a question from an applicant that starts with "Should I . . . ?"

## So what is legal information vs. legal advice?

Legal information is a statement of what the law is without any application of an applicant's individual situation. It refers to generally applicable rules and procedures that do not require analysis of any particular set of facts. For instance, non-legal staff can tell applicants about USCIS processing times, eligibility requirements for naturalization, and filing instructions.

Legal advice involves analysis of the applicant's situation and providing an opinion on a certain course of action based on the applicable law. Attorneys and accredited representatives can advise applicants whether an eligibility requirement is at issue or whether they should include certain negative information on the application itself, for example. Sometimes the line between legal information and legal advice can be blurry. So when in doubt, you should refer the individual to get legal advice.

Examples of unauthorized legal services	Examples of permitted support role activities
Suggesting specific answers on citizenship application	Filling in blanks on application with information provided solely by applicant
Advising applicant which immigration forms to use (e.g., N-648)	Explaining the purpose of each form and general instructions on what it includes
Assessing fee waiver eligibility based on information provided by applicant	Explaining different bases for fee waiver eligibility
Predicting outcome of naturalization process for applicant	Describing the adjudication process and all possible outcomes

## VI. Staff Availability

Depending on the capacity of legal staff with the requisite expertise in immigration law to provide legal review, you may have to structure scheduling around their availability. You may opt to have an appointment-based system where applicants can schedule appointments with legal staff when they are deemed ready for legal review. Another option is to have live office hours where applicants can contact staff directly via telephone as they work on their applications on their own time and schedule legal review during designated windows. You should also consider how mobile you want your practice to be and how accommodating your staff can be to applicants in different time zones and those with inflexible work schedules, for instance.

## VII. Applicant Follow-up Timeline

In addition to creating a legal review workflow, having a plan for different stages of applicant follow-up can help maximize staff time. The plan should account for applicants who become unresponsive and those who may need additional time to gather missing information and documents before they can finalize their applications. For instance, staff should have guidelines on how many follow-up attempts to make after an applicant becomes unresponsive and on setting deadlines for applicants to gather information and complete tasks. Advancing Justice - LA staff typically attempts three contacts via phone, text messaging and/or email before deeming an applicant as unresponsive and discontinuing efforts.

Following up with unresponsive and unmotivated applicants can be time consuming so having a thoughtful plan can create consistency and help staff prioritize tasks for multiple clients. Applicants who miss phone appointments and do not follow-up within agreed upon time frames may not be ready to apply for citizenship, so guidelines for these scenarios can allow staff to shift focus to applicants who are engaged and ready to move forward with the process. For instance, Advancing Justice - LA generally gives applicants up to two weeks to provide necessary information or documents to move forward with their cases. If an applicant becomes unresponsive while engaged in services, staff make three follow-up attempts and communicate a deadline at which point they will stop any additional attempts and close the applicant's case with their office. Finally, staff should utilize a case tracking system to manage the applicant interactions, whether on a spreadsheet or in a case management system.



## VIII. Third Party Involvement

Applicants may have friends or family members helping them with the naturalization application and process. You may learn during the first conversation with an applicant that a family member completed the application on Citizenshipworks without the applicant's active involvement. Or you may find that a family member created the account on behalf of the applicant and the applicant has no knowledge of the application and the services you are providing. When initially following up with individuals, you should confirm that you are speaking directly to the applicant. If a third party has helped complete the application, you will need to make sure that the applicant has nonetheless reviewed the entire application and understands all of the questions and responses. In some situations, remote services may not be appropriate. For instance, an applicant who cannot confirm understanding of the application questions and corroborate responses should be referred for in-person services and possible N-648 assessment.

## IX. Applicant Feedback

Consider developing a plan to solicit feedback from applicants at different stages of services. For example, you might make use of short questionnaires to collect information at intake, or when applicants decline assistance. Surveying applicants who never responded to communications or stopped responding after initial interactions may generate ideas on how to make adjustments to services, communications, and procedures. For successful applicants who receive full scope remote services from your organization, it may be helpful to solicit their feedback as part of the case closing process. GMHC requests feedback from their remote service clients and has received the following feedback:

- “Thanks so much for your support. The phone call support was really nice. I was able to ask questions and get answers right away.”
- “Better than good, absolutely great. I would have never completed this without your help. Special thanks to Vishal and Connie. Kind, courteous, and absolutely professional. Thank you.”
- “Excellent service. Please keep doing this good work. Thank you.”

Testimonials from applicants who had positive experiences working with your program can be shared as part of your outreach strategy. Advancing Justice - LA, for example, customized the testimonials on their Citizenshipworks campaign portal to reflect actual applicant feedback they received during the case closing process.

Any applicant feedback is valuable for new programs and services, so that you can make informed changes and test them as necessary. This process should be ongoing and the feedback tools themselves should be assessed regularly for usefulness.

## REMOTE REVIEW MODEL

The remote citizenship service model generally implemented by NAC partners has five stages including: (1) outreach; (2) account creation and opt-in; (3) application completion; (4) legal review; and (5) case closing. The section below describes each section in detail and how NAC partners implemented the various service stages.

### Remote Review Service Stages



## I. Outreach

The applicant learning of the remote review opportunity is the first stage of this service model. As previously described in this guide, applicants become aware of the remote review opportunity offered by NAC partners in a variety of ways including social media ads, the outreach activities of the service provider itself, and referrals from NAC affiliates, CBO partners, Citizenshipworks, and past clients. Outreach efforts typically direct potential applicants to the NAC partners Citizenshipworks campaign page or portal page. Some partners also built a dedicated page on their organizational website to introduce and describe their remote citizenship services.

## II. Citizenshipworks Account Creation & Limited Service Scope Agreement Opt-In

Once the applicant has become aware of the remote review opportunity, the next step in the service process is for the applicant to create a Citizenshipworks account. Some applicants are able to create an account on their own, while others require the support of a service provider or the referral partner such as a trusted CBO or Citizenshipworks. A complete Citizenshipworks account creation guide is also included in the appendix.

Applicants must also opt-in the remote services being offered by the Campaign partner. As described in the Limited Scope Service Agreement and the Building Trust section, the opt-in to legal services should be as simple as possible. The more steps there are to secure applicants' permissions for legal referrals and services, the more likely that they may not continue with the process. Therefore, a best practice is to incorporate the limited scope agreement into the Citizenshipworks workflow, which is a feature that IRC - Atlanta utilizes. Their Citizenshipworks portal has a pop-up screen that the applicant user has to agree to before continuing on the platform. This pop-up language, as well as a sample agreement in English and Spanish is included in the Appendix.

## III. Application Completion

Applicants vary widely in their ability to progress through the Citizenshipworks application completion process. Pilot partners found that proactive outreach went a long way to build trust and help nudge applicants through the application completion phase.

### Welcome Contact

Applicants that opt-in to remote review services, whether by referral or by directly creating an account through the organization's Citizenshipworks portal, should be contacted promptly. A good guideline to follow is two business days after the applicant opts in to services. Prompt follow-up with applicants actively engaged in the application process and resolving their questions may encourage them to complete the process. In Advancing Justice - LA's experience, applicants who had recently created Citizenshipworks accounts were more likely to be responsive to their services than those who had created accounts months prior.

As mentioned above, it is important to maintain a tracking system of all attempts to contact applicants, including how many times staff will attempt to contact unresponsive applicants after opt in, the appropriate intervals to contact them, and the modes of communication that should be used based on information available. Advancing Justice - LA generally attempts three contacts before marking an applicant unresponsive. Initially, their staff calls or emails the applicant, depending on how they opted in to their services, within two business days of being notified of the opt-in. When their staff started utilizing text messaging, they would also contact applicants via text message to schedule an intake call if a mobile phone number was available. IRC - Atlanta also spaces out applicant follow-up every few days and alternates the method of communication when sending out friendly reminders to make sure applicants have the space they need to decide and move forward with the process. Their staff and volunteers also utilize messaging templates for consistency whenever possible.

## Intake Call

An intake call may be scheduled at a later time or take place concurrently with the initial welcome contact. The intake process should include your organization's standard intake questions, screening questions to assess fee waiver interest and eligibility, complex issues not already flagged in Citizenshipworks, and any additional demographic information you want to capture for grant or other purpose. The intake call may also be the opportunity for you to explain the services and process in detail, why the NAC provides this free service, and build trust with the applicant. These conversations can range from 15 to 30 minutes depending on the applicant's needs and situation.

It is also helpful to review the applicant's information in Citizenshipworks prior to making contact, so that you can follow up on any potential red flag issues and remind the applicant to work on any incomplete sections. Once you confirm that the applicant wants to proceed with full scope services, you can verbally review the key terms of the service agreement and explain how to sign the document electronically once the applicant receives and reviews it.

Advancing Justice - LA staff typically creates a full intake record once they make contact with an applicant, but will pre-populate basic information they already have access to in Citizenshipworks to confirm with the applicant once they connect by phone. Once staff completes the screening and confirms that the applicant is ready for legal review, they will then schedule the legal review appointment at a mutually convenient time and provide an explanation of next steps, including the service agreement and how to access video chat during the legal review appointment.

## Additional Application Completion Tips

Some partners, such as IRC - Atlanta have developed a five-minute video walkthrough of the Citizenshipworks account creation and application completion process, as well as a powerpoint presentation to guide applicants and volunteers. IRC - Atlanta recommends including user tips in the guide such as letting the applicant know that they may skip questions during the application completion phase.

Programs that require applicants to complete a certain percentage of their applications before qualifying for services should have a system for tracking and encouraging enrolled applicants' progress. IRC-Atlanta recommends sorting Citizenshipworks clients to view by either "last activity" or "% completion" in order to prioritize applicants for initial review. Applicants with a higher completion rate and most recent activity are more likely to respond and more likely to still seek legal review. The IRC-Atlanta intake specialist first screens each application for yellow and red flags, as well as incomplete questions. If there are no major concerns, an Intake Specialist will conduct a thorough data entry check. Qualifying applicants, which in the case of IRC are those clean cases with no arrests, will receive an initial message via the Citizenshipworks.

In the next few days, the intake specialist follows up with the provided phone or email, reminding the applicant to check their Citizenshipworks message, review it, and reply. Since few applicants check their Citizenshipworks messages, the IRC-Atlanta intake specialist uses the additional contact information on the N-400 to follow up with the applicant. Once the applicant replies, the intake specialist sends the applicant a second Citizenshipworks message tailored to their exact needs for legal review, specifying the page and section of each item to edit.

## IV. Legal Review

An applicant that has completed more than 90% of the application on Citizenshipworks can be scheduled for legal review. Staff should set aside at least 1 hour for the legal review appointment, though the time can vary greatly depending on the applicant. If the applicant has not reached the required threshold, staff may want to encourage the applicant to complete the application before scheduling legal review. Staff can also offer support to answer questions and guide application completion. In some scenarios, it may be appropriate to schedule a legal consultation appointment to address a preliminary eligibility issue before encouraging application completion.

Each pilot partner sets their own legal review process and standard for the applicant's readiness for legal review. GMHC receives referrals from the Citizenshipworks team of mostly DIY applicants who have contacted their support channels and have completed 90%+ of their application. These applicants started their Citizenshipworks application on their own, but were not able to complete it because they either require a review due to red flags and/or incomplete questions or requested a review and are generally motivated to finalize their applications.

At IRC-Atlanta the intake specialist will schedule the applicant for legal review with an accredited representative within two day of the application being complete, and also assigns the case to that accredited representative. In IRC - Atlanta's experience, applicants' interactions with staff and interns leading up to the legal review session help build trust and make the interaction with legal staff more productive. They have found that applicants are more forthcoming during the legal review appointment and may also be willing to accept fee waiver assistance when initially declined at intake, likely because they are primed with key information at the outset that is reinforced and explained in greater detail at the legal review appointment.

As noted earlier, the legal review process should follow established written guidelines to ensure consistency and that staff do not overlook important issues. In addition to verifying critical deportability and eligibility issues such as criminal history, travel, LPR abandonment, and good moral character, it is important to confirm with the applicants how they obtained their LPR status and to make sure that all issues were adjudicated appropriately. Programs can refer to comprehensive legal resources on common red flag issues (i.e., ILRC Naturalization Field Guide: Resources for Red Flag Screenings and Application Reviews) to develop their own internal guidelines.

Due to the sensitive nature of these issues, we again encourage advocates to utilize the video chat feature in Citizenshipworks for legal review as it may help facilitate trust and candor with applicants. Advancing Justice - LA staff found that applicants almost always waited until the legal review session to divulge sensitive issues and concerns and did not include them at the outset when completing their applications on Citizenshipworks. It underscored that establishing a relationship and having a meaningful consultation with legal staff are necessary steps for applicants to share critical background information and ultimately feel comfortable self-filing applications.

## V. Closing Case

### Final Review

Often the legal review appointment will reveal new information that requires additional information and possible document gathering by the applicant. In some situations, it may even be necessary to advise the applicant to complete a Freedom of Information Act (FOIA) request with different government agencies to fully advise the applicant and to make sure that earlier applications were adjudicated correctly. Once all issues have been cleared, the advocate should prepare a final draft of the application for the applicant to review.

## Filing Instructions

Once the application is finalized, staff should provide the mailing version for submission to USCIS. Staff should provide self-filing instructions to the applicant. Once the applicant has received the final application and staff has confirmed with the applicant that there are no additional questions, they should indicate that the case is closed in the legal case management system as well as on Citizenshipworks.

Pilot partners typically follow-up with applicants in writing after the legal review session. For instance, IRC - Atlanta legal staff emails applicants after legal review and provides a summary of the legal review process and instructions on mailing the finalized applications. Similarly, Advancing Justice - LA staff email written instructions on any follow-up items after the legal review session. After final review of the application by staff and the applicant, staff verbally provide self-filing instructions and memorialize them in the closing letter to the applicant with the finalized application forms. The letter also includes information about the naturalization process, including when to expect a receipt and biometrics notices and the interview process, as well as an opportunity to provide feedback about our services.

## Legal Referral

There may be times when applicants need a legal referral to a local provider due to the complexity of their case. GMHC utilizes the Immigration Advocates Network's legal directory to find local providers: <https://www.immigrationlawhelp.org>. Or if an applicant is local, you can refer them internally for an in-person consultation to your office to review everything and offer G-28 representation for the case, capacity permitting. However, when additional services are offered, the remote services agreement is no longer in effect and you must execute a new agreement reflecting the actual services being provided.

## Seek Feedback and Outreach Assistance

As previously described in the Applicant Feedback section, it is a best practice to seek applicant feedback especially as part of the case closing process. Account closing is also a great time to ask applicants to become part of your outreach team. Because peer-to-peer outreach is a powerful strategy, it is important to ask former clients to help your outreach efforts in any number of ways including asking your client to:

1. Post on your social media about their remote service experience, what motivated them to apply, or the general benefits of applying for citizenship
2. SMS friends and family your CW portal page link
3. Provide a review for our Citizenshipworks profile

## SAMPLE REMOTE REVIEW MODELS

### I. Do-It-Yourself or Start-It-Yourself Model

This model can be followed for applicants who have created accounts on Citizenshipworks and completed most of their applications regardless of how they are routed to your organization:

1. Applicant opts in to Legal Partner's services through Citizenshipworks or partner portal
2. Staff conducts a conflicts check in legal case management system
3. Staff reviews Applicant's Citizenshipworks account and application
4. Staff creates client record in legal case management system using information available in Citizenshipworks

5. Staff sends welcome email or text to schedule intake call, or calls Applicant directly, depending on opt-in information available
6. During legal intake call:
  - a. Staff explains services and service agreement and also addresses fee waiver screening and applicant's basic questions
  - b. Confirm criminal history with applicant and request documents for review prior to legal review (if applicable)
7. Staff schedules legal review with Applicant and provides items that need to be completed before appointment
8. Applicant executes limited scope service agreement electronically
9. Staff conducts legal review via video chat
10. Follow-up as needed
  - a. Information/document gathering
  - b. Legal research by legal staff
  - c. Technical assistance from legal partners
11. Applicant receives final application, completed fee waiver form (if applicable), and closing letter with self-filing instructions and USCIS processing information

## II. CBO Referral Model

This model reflects the shift in strategy for some partners during the Pilot to develop relationships with CBOs that are a ready source of applicant referrals. The main criteria for referral CBO partners is that they are trusted by eligible-to-naturalize LPRs in their respective communities, have access to technology to facilitate Citizenshipworks access, and are located in communities that need more access to legal services providers.

1. CBO directs Applicant to Legal Partner's Citizenshipworks portal and/or background resources such as orientation video in Spanish/English to provide an overview of services
2. CBO provides Applicant with written guide on account creation with portal link
3. CBO ensures Applicant completes "Start Now" prescreening on the portal
4. If Applicant completes the prescreening, applicant provides the following information, either on Applicant Worksheet (see Appendix) or in Citizenshipworks:
  - Green card
  - Home address with corresponding dates for last 5 years
  - Names, addresses, dates of employment and school for last 5 years
  - Dates of trips outside U.S. for last 5 years
  - Details on any contact with law enforcement
5. CBO confirms Applicant's account creation and completed worksheet before making formal referral to Legal Partner for legal review by emailing completed worksheet
6. Applicant has option to complete application on own and CBO to refer to Legal Partner when CBO verifies completed application
7. Legal Partner to handle all subsequent applicant communications and assistance directly and schedules remote review by appointment, following workflow steps in DIY/SIY model above
8. If applicant needs additional support to complete and file application, including language support, Legal Partner to request CBO support on case-by-case basis
9. If Applicant contacts CBO directly, Applicant to be directed to Legal Partner staff

## III. Citizenship Class Partnership Model

1. CBO directs Applicant to Advancing Justice - LA's Citizenshipworks portal and directs applicant to orientation video in Spanish/English to provide an overview of services
2. CBO provides Applicant with written guide on account creation with portal link
3. CBO to have Applicant sign Release for information sharing and joint assistance by CBO and Advancing Justice - LA
4. CBO to guide application completion with technical assistance from Advancing Justice - LA
5. CBO can have Applicant complete in stages in classroom setting
6. CBO confirms Applicant has reached 90+% completion before scheduling Applicant for legal review with Advancing Justice - LA
7. Advancing Justice - LA can provide appointment slots during regular class window
8. After legal review, Advancing Justice - LA to provide Applicant with written list of follow-up items and CBO to assist with follow-up
9. CBO to provide self-file instructions to Applicant and support with application submission to USCIS, as necessary
  - File copies of signed application
  - Mailing application with return receipt

## ADDITIONAL ITEMS TO CONSIDER

### I. Fee Waiver Assistance

Many applicants will inquire about fee waiver options and eligibility before they want to move forward with the naturalization process. A valuable tool to confirm eligibility for a full or reduced fee waiver is on the NAC website: <https://www.newamericanscampaign.org/fee-waiver/>. While not all programs will be able to provide fee waiver assistance, it is important to provide this information to applicants and address general eligibility issues at the outset. For programs who are open to preparing or reviewing fee waiver request forms, it is important that you are equipped to advise on and confirm eligibility by reviewing documents such as public benefits verification letters and income tax returns. Each state will have different means-tested benefits programs and procedures, so it is helpful to identify resources in advance if you are assisting applicants outside of your own state.

Since fee waivers are not available to complete on Citizenshipworks, they must be completed off the platform on a separate PDF downloaded from the USCIS website. At GMHC, in many cases, the legal advocate completed the fee waiver. To save time, it would be helpful to train referral partners to assist with fee waivers and to have applicants, if they are able, fill out as much of the form as possible.

At IRC - Atlanta, non-legal staff and interns complete fee waiver applications for eligible and interested applicants and provide these draft forms to legal staff for legal review. This process allows legal staff at IRC - Atlanta to provide a comprehensive onestep legal review session.

When doing fee waivers based on tax returns, BPSOS reviews the most recent tax return along with the applicant's W-2, and 3 months worth of paystubs. During this pandemic, IRC - Atlanta staff have been relying on tax returns to submit as supporting documentation for fee waiver eligibility since some clients are unable to retrieve their tax transcripts online and other options were unavailable while IRS offices were closed.

### II. Legal Review Advocate as Preparer

Generally, applicants that advocates assist through a remote review services model will be "preparers" of their own applications and would not require the advocates to complete the preparer section of the citizenship application.

During a standard legal review process, the advocate will make minor adjustments to the application but would not list themselves as the preparer and sign the application unless they have actually gone through the entire application with the applicant. While there is no bright-line rule as to when the reviewing staff should be deemed the preparer, if you are making significant substantive changes to the application during the legal review process, it is best to review the entire application with the applicant and complete the preparer section.

### III. Interpreter Needs

Applicants should be able to understand all of the questions in the citizenship application and provide appropriate answers. During the course of assisting an applicant, you recognize that the client cannot understand the content of the application in English, you should ask whether the applicant has a friend or family member who could interpret the entire application and sign the interpreter section. If the applicant does not have access to such an individual, the advocate could serve that role. The advocate would then have to review the entire document with the applicant and verify the answers in order to complete and sign the interpreter section of the application. In this situation, the advocate should print the finalized application and sign the preparer section before mailing the original to the applicant for self-filing.

### IV. Third Party Account Creation

As noted above, you may encounter situations where family members have created accounts on behalf of potential applicants. However well-meaning, family members should not be the primary contact for virtual citizenship services. If the applicant is unable to communicate or otherwise work on their application directly with the advocate, virtual services are likely not suitable and the applicant should be referred to a local organization for in-person services. Even if a family member is providing support to the applicant, it is also important that you communicate directly with the applicant for all services. That being said, family members can be extremely helpful in preparing the applicant for remote services and providing necessary information to complete the application.

### V. Local Applicants

Applicants who live in close proximity to the organization providing remote services may request or insist on in-person services. Depending on how your remote review services are staffed and funded, you may want to encourage continuing services remotely by focusing on the benefits and flexibility. Nonetheless, in-person services may be more appropriate if the applicant is not comfortable with technology or lacks access to necessary tools, or has a complex case that would benefit from full representation, for instance.

### VI. When Technology Fails

In some situations, despite clear instructions and planning, advocates may not be able to connect with applicants over videoconferencing. There may be unknown issues with the equipment or the applicant may not be familiar with the tools and how to allow camera or microphone access for the platform to function properly, for example. In situations where the Citizenshipworks tool and the back-up option like Zoom do not come through, campaign partners have opted to conduct the legal review session via telephone so they do not lose the opportunity to assist the client during the scheduled time. However, if there are unresolved eligibility issues or credibility concerns during the session, campaign partners try to schedule a follow-up videochat to have another conversation.

### VII. Hard of Hearing Applicants

Assisting applicants with disabilities should be part of a larger legal services plan for your organization. In the remote services context, instant messaging through Citizenshipworks platform and text messaging are tools that can help communicate with applicants that are hard of hearing but may not have assistive communication tools available to them.

### VIII. Not All Applications Are Fileable

It is also important to note that some pilot partners spent significant effort assisting long-term LPRs who had red flags in their applications and did not end up producing fileable N-400s. Common red flag issues include: traffic tickets, arrest and/or criminal history, negative immigration history, good moral character, travel and possible abandonment of LPR status, taxes, derivative citizenship and others. Some applicants learned during their legal consultations that there were risks to applying for citizenship due to criminal convictions, income tax issues, unpaid child support, and improper adjudication of their adjustment of status applications when they became LPRs, and ultimately were advised not to file their applications. For one partner, applicants who did not produce fileable N-400s on average have been in the U.S. nearly twice as long than those who did produce fileable N-400s. Nonetheless, these applicants often benefit from partners' legal services because they now understood the exact bases for their ineligibility and the risks of applying for citizenship.



## APPENDIX: SAMPLE DOCUMENTS + TOOLS

### I. Citizenshipworks Account Creation Guides (English + Spanish)

#### Creating your Citizenshipworks Account

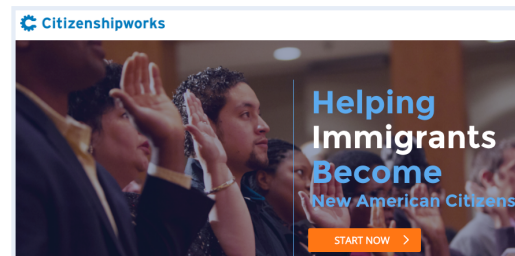
Asian Americans Advancing Justice - LA is a non-profit organization and a partner of the New Americans Campaign, a national network of trusted non-profit partners that can help you apply for citizenship. Advancing Justice - LA is working closely with local community organizations throughout the United States to make our citizenship legal services available to more community members. We use Citizenshipworks, a free and secure online service, to guide you through the process.

To get started, please follow the following instructions to create an account, log in, and start working on your Citizenship Application!

**STEP 1** Type in the following web address on your browser:

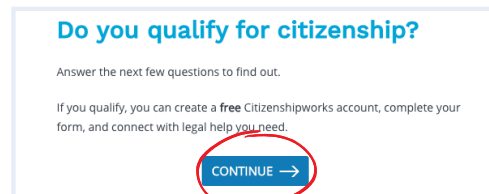
<https://www.citizenshipworks.org/campaign/nac-vr>

Click on **START NOW**.



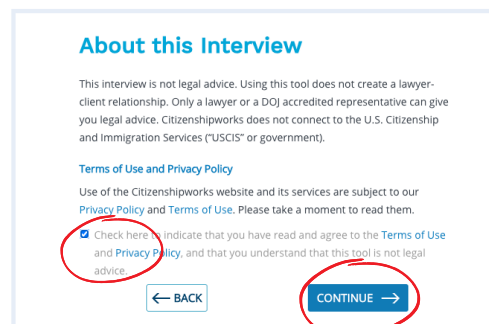
**STEP 2** Complete the eligibility screening and Sign up!

Click on 'Continue' to Start the eligibility screening.



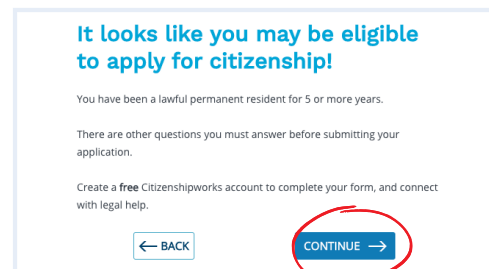
**STEP 3** Accept Terms and Conditions and Complete Eligibility Screening.

First, please **check the box** to accept the terms of use and privacy policy and **click Continue**.



You will be prompted to answer a couple of preliminary questions just to make sure you are eligible to apply for Citizenship. Please answer all questions accurately to properly determine your eligibility.

If you qualify, you will be asked to create a FREE Citizenshipworks account. **Click Continue** to Sign Up and get started on your application. Remember all your information is kept confidential.



**STEP 4** Create your Citizenshipworks Account

You can create an account using your [email address](#) **OR** [cell phone number](#). You can write down your login information on the bottom of this handout in case you forget it. Please keep this information in a safe place and do not share it.

**STEP 5** Confirm your enrollment with our organization.

By confirming your enrollment with our organization, we are able to provide free legal assistance and answer your citizenship related questions, just [click on 'Join'](#).

**STEP 6** Get Started and Complete your Application!

Begin your application! Click on [START](#) or [START HERE](#) at the top of your dashboard. Complete as much as you can and answer all questions truthfully to the best of your ability.

OR

Once you are finished with your application (whether 100% or less), double check that your information is correct. Click on [REVIEW](#) and [INCOMPLETE QUESTIONS](#) and ensure that you answer as many as possible. If you are not sure or do not have the information, leave it blank. Review your [APPLICANT WORKSHEET](#) and ensure that you have all necessary documentation to bring with you to your next appointment or Virtual Review Appointment.

Please use the space to the right to write your username (email or phone number) and password so you won't forget your login:

**USERNAME:** \_\_\_\_\_

**PASSWORD:** \_\_\_\_\_

## Creando su cuenta de Citizenshipworks

Asian Americans Advancing Justice - LA es una organización sin fines de lucro asociada con la campaña de nuevos americanos (New Americans Campaign), una red nacional de organizaciones sin fines de lucro de confianza que le pueden ayudar a solicitar la ciudadanía. Advancing Justice - LA trabaja junto con organizaciones comunitarias locales alrededor de los estados unidos para asegurar que nuestros servicios legales de ciudadanía sean disponibles a más miembros de la comunidad. Usamos Citizenshipworks, una plataforma de servicio seguro y gratuito para ayudarle con el proceso.

¡Para empezar, por favor siga las instrucciones siguientes para crear una cuenta, ingresar, y comenzar a llenar su solicitud de ciudadanía!

**PASO 1** Visite la siguiente página :

<https://www.citizenshipworks.org/campaign/nac-vr>

Oprima 'START NOW' : Para cambiar el lenguaje a español, oprima la opción para cambiar el lenguaje que se encuentra en la parte de arriba de la página y seleccione 'español'.



**PASO 2** ¡Complete las preguntas de elegibilidad e inscríbese!

Oprima 'Continuar' para empezar a contestar las preguntas de elegibilidad



**PASO 3** Aceptar los términos y condiciones y completar las preguntas de elegibilidad

Primero, por favor **marque la cajita** para aceptar los términos de uso y póliza de privacidad y oprima 'Continuar'. Se le hará una serie de preguntas preliminares para determinar que usted sea elegible para solicitar la ciudadanía, por favor conteste todas las preguntas adecuadamente para poder apropiadamente determinar su elegibilidad. Si califica, se le pedirá crear una cuenta GRATUITA de Citizenshipworks, oprima 'Continuar' para inscribirse y empezar a llenar su solicitud. Recuerde que todo es confidencial.



## PASO 4 Crear su cuenta de Citizenshipworks

Puede crear su cuenta usando su [correo electrónico](#) O [numero de celular](#). Lo puede apuntar la información en la parte de abajo de esta hoja para que no se le olvide. Por favor mantenga esta información en un lugar seguro y no la comparta.

## PASO 5 Confirme su inscripción con nuestra organización

Al confirmar su registración con nuestra organización, le podremos brindar asistencia legal gratuita y responder a sus preguntas de ciudadanía, simplemente oprima 'Unirse'.

## PASO 6 ¡Comience a llenar su solicitud!

¡Comience a llenar su solicitud de ciudadanía! Oprima [EMPEZAR](#) O [EMPIECE AQUÍ](#) al comienzo de su página. Complete lo más que pueda y responda a todas las preguntas honestamente.



Quando usted haya terminado su solicitud ( ya sea el 100% o un poco menos), vuelva a revisar que toda la información esté correcta. Oprima [REVISAR](#) y [PREGUNTAS INCOMPLETAS](#) y asegúrese de haber contestado la mayor parte posible. Si no esta seguro o no tiene la información, déjelo en blanco. Revise su hoja de 'INFORMACIÓN NECESARIA' y asegúrese de tener toda la documentación necesaria y traerla a su próxima cita o tenerla disponible el día de la revisión virtual de su solicitud.

## Acerca De La N-400 Cómo funciona

Citizenshipworks le ayudará a llenar el formulario N-400. Ese es el formulario que tiene que llenar para solicitar ser ciudadano de EE.UU.

Le haremos preguntas, una por una. Antes de empezar cada sección le ayudaremos a entender cuáles documentos o información podría llegar a necesitar.

También le notificaremos cualquier problema en su solicitud de ciudadanía que podría hacer que le resulte difícil hacerse ciudadano. Y le ayudaremos a encontrar un defensor para que revise su caso. ¡Empiece! Haga clic en una de las secciones a la izquierda para empezar. Le recomendamos que primero conteste algunas pocas preguntas importantes en la sección "Empiece aquí".

## Documentos y Información que necesitará

- Su tarjeta verde
- Las direcciones de todos los lugares donde vivió en los últimos 5 años
- Los nombres, las direcciones y las fechas de los trabajos que tuvo y las escuelas donde estudió en los últimos 5 años.
- Sus viajes fuera de EE.UU. en los últimos 5 años
- Información sobre su familia, incluyendo matrimonios e hijos
- Cualquier contacto que haya tenido con oficiales de la ley

EMPEZAR

Por favor use el espacio siguiente para apuntar su correo electrónico o numero de teléfono y su contraseña para que no se le olvide:

Correo electrónico o Teléfono: \_\_\_\_\_

Contraseña: \_\_\_\_\_

**\*CONTRIBUTED BY CITIZENSHIPWORKS\***

 **Citizenshipworks**

### 1. Open Citizenshipworks

- Open an up-to-date internet browser (preferably Chrome or Firefox).
- Go to [www.citizenshipworks.org/campaign/nac-vr](http://www.citizenshipworks.org/campaign/nac-vr).

### 2. Create an Account

- Click [Start Now](#) to begin the prescreening.
- Choose your preferred language at the top of the page.
- If you qualify, create an account with a cell phone number or email address.
- Enter the verification code texted or emailed to you.

### 3. Sign In

- After you verify your account, sign in. (If you are using your cell phone number, enter it without spaces or punctuation.)
- A pop-up will appear asking you to join Asian Americans Advancing Justice - Los Angeles (Online). Click [Join](#). The page will reload and [AAAJ-LA Online](#) will appear under your first name in your dashboard.

### 4. Complete the Application

- Click [Application](#) in your dashboard.
- Read the instructions in [About the N-400](#) and click [Start](#).
- Your answers are saved when you go to the next page.

*Tip: If you are unsure about a question, skip it for now. You can use the menu to the left of the page to navigate between sections.*

### 5. Prepare for Legal Review

- If you are less than 100% complete, go to [Review > Incomplete Questions](#) in the menu to the left of the page. Answer as many incomplete questions as you can. You should aim to finish at least 95% of your application.
- Check that [AAAJ-LA Online](#) appears under your first name in your dashboard.
- If not, log out. Go to [www.citizenshipworks.org/campaign/nac-vr](http://www.citizenshipworks.org/campaign/nac-vr) and sign in from the top right of the page. Click [Join](#) on the pop-up. The page will reload and [AAAJ-LA Online](#) will appear under your first name.
- Log out of your account.

 **Citizenshipworks****1. Abre Citizenshipworks**

- Abra un navegador de internet actualizado (preferiblemente Chrome o Firefox).
- Vaya a [www.citizenshipworks.org/campaign/nac-vr](http://www.citizenshipworks.org/campaign/nac-vr).

**2. Cree una cuenta**

- Haga clic en **Empezar** para comenzar la evaluación previa.
- Seleccione su idioma preferido en la parte superior de la página.
- Si califica, cree una cuenta con un número de teléfono celular o correo electrónico.
- Ingrese el código de verificación que fue enviado por texto o correo electrónico.

**3. Inicie sesión**

- Después de verificar su cuenta, inicie sesión. (Si está usando su número de teléfono celular, ingréselo sin espacios ni puntuación.)
- Aparecerá un mensaje preguntando si quiere unirse a Asian Americans Advancing Justice - Los Angeles (Online). Haga clic en **Unirse**. La página se actualizará y aparecerá **AAAJ-LA Online** bajo su nombre en su tablero.

**4. Complete la solicitud**

- Haga clic en **Solicitud** en su tablero.
- Lea las instrucciones en **Acera de la N-400** y haga clic en **Empezar**.
- Sus respuestas se guardan cuando vaya a la próxima página.

*Consejo: Si tiene dudas sobre una pregunta, siga adelante por ahora. Puede usar el menú a la izquierda de la página para navegar entre secciones.*

**5. Prepárese para la revisión legal**

- Si ha completado menos del 100%, vaya a **Revisar > Preguntas Incompletas** en el menú a la izquierda de la página. Responda tantas preguntas incompletas como pueda. Debe intentar terminar al menos el 95% de su solicitud.
- Compruebe que **AAAJ-LA Online** aparezca bajo su nombre en su tablero.
  - Si no, cierre sesión. Vaya a [www.citizenshipworks.org/campaign/nac-vr](http://www.citizenshipworks.org/campaign/nac-vr) e inicie sesión desde la parte superior derecha de la página. Haga clic en **Unirse** en el mensaje. La página se actualizará y aparecerá **AAAJ-LA Online** bajo su nombre.
- Cierre sesión.

## II. CBO Applicant Worksheet



### Citizenship Application Worksheet

Please provide the following information directly on this worksheet, or in your Citizenshipworks account. If the required information is in Citizenshipworks, check the box next to the item to indicate that you have completed this information.

**A# on Permanent Resident Card** (also known as your “green card”)

\_\_\_\_\_

**\*\*Make sure you have your physical card for future appointments.**

**Your home address(es)** for the past 5 years, including dates.

Address	From (date)	To (date)

Your **employer(s) and school(s)** for the past 5 years, including dates.

Employer or School	Address	From (date)	To (date)

Every trip you have taken outside the U.S. (including trips to Canada and Mexico) for the past 5 years\*\*If you have traveled outside the U.S. for more than 6 months at a time since you got your green card (even if outside the last five years), please also include those trips.

From (date)	To (date)	To (date)

Details of any contact with law enforcement, including arrests, convictions, etc., including traffic violations

Date	Location	Description

If you want to apply for a fee waiver for the \$725 USCIS application fee, please provide the following information:

III. Number in household \_\_\_\_\_ Total household income (gross) \_\_\_\_\_

IV. Check box if you are currently receiving any government benefits (Food stamps, cash aid, Medicaid, etc.).

## V. BPSOS Sample Messaging (English + Spanish)

### Welcome Text/Email:

Hi [Applicant Name] –

Welcome to BPSOS and CitizenshipWorks. I am [your name], and I'm here to help you with your citizenship application. BPSOS is a trusted non-profit organization that has been serving the unique legal, health and social needs of immigrant communities for 40 years.

I can answer questions about citizenship, help you complete your application, and pass it on to our attorney if you have any issues that you would like to address. We also provide instructions on how to send your application to USCIS, and assistance completing the fee waiver form if you need it. \_\_\_\_\_

BPSOS is not part of the government, and our citizenship services are free. But we do need to make sure you understand what we can and cannot do. So please acknowledge that you have read and agree to the attached Limited Services Agreement.

If you have any questions, please reach out by text to (832) 696-0684, or email to citizenshiponline.bpsos@gmail.com.

I look forward to hearing from you.

Thank you,

### Follow-up Text:

Hi [Applicant Name] –

I am writing to follow-up on your citizenship application. We are available to help you finalize your application and address any questions that you may have. You can reach us by texting (832) 696-0684. Or you can email me at: citizenshiponline.bpsos@gmail.com.

### Final Text:

Hi [Applicant Name] –

I see you created an account under our CitizenshipWorks online portal, but have not completed your application.

I have tried reaching you by text to offer assistance, including review of your application by an attorney. Unfortunately, I have been unable to reach you. This will be my last attempt to contact you. If you have any questions or still need assistance, please feel free to contact me directly when you are ready. I can be reached by text at (832) 696-0684 or by email at citizenshiponline.bpsos@gmail.com.

Best of luck,



## Sample Script Explaining Services (if applicant is unsure of our services)

Our services are completely free. We are a non-profit organization that is part of a national effort to help more lawful permanent residents become U.S. citizens. We assist applicants in the state of Texas. But if you live somewhere else, or you need more help than we can provide, we will do our best to refer you to a local service provider for assistance.

If you get stuck as you work through your application, please reach out by text to or email. I can answer questions about citizenship, help you complete your application, and pass it on to our attorney if you have any issues that you would like to address. We also provide instructions on how to send your application to USCIS.

And if you are unable to afford the USCIS application filing fee, we can discuss your situation to determine whether you are eligible for a fee waiver, and help you complete the fee waiver form if you are eligible.

For more information about BPSOS, go to our website: <https://www.bpsos.org/bpsos-houston>. I can be reached by text at (832) 696-0684 or by email at [citizenshiponline.bpsos@gmail.com](mailto:citizenshiponline.bpsos@gmail.com).

## CLOSING EMAIL: Please tell me where to find the Document Verification List and Next Steps.

Hola [nombre del solicitante],

¡Su aplicación N-400 está lista para enviar! Adjunto encontrará la versión finalizada, una lista de los documentos que debe incluir y qué esperar a medida que se procesa su solicitud. Siga cuidadosamente las instrucciones a continuación para asegurarse de que su solicitud se procese correctamente:

1. Imprima la solicitud y firme la página # 17. Ingrese la fecha en que la enviará. Asegúrese de que las páginas solo tengan información en 1 lado de la página. (USCIS puede rechazar la solicitud si tiene información en 2 lados de la página). Además, no lo engrape. Usa un clip de papel.
2. Lea atentamente la lista de verificación de documentos adjunta. Incluya todos los documentos en esta lista que he verificado. (Adjunto como N-400 checklist)
3. Antes de sellar el sobre, haga una copia de todo lo que está poniendo en el sobre, incluido el giro postal o verifique la tarifa de presentación.
4. Revise los siguientes pasos adjuntos para saber qué esperar y cómo prepararse para el resto del proceso de ciudadanía. (Adjunto como Next Steps)

Si tiene alguna pregunta, comuníquese por mensaje de texto al (832) 696-0684 o envíe un correo electrónico a [citizenshiponline.bpsos@gmail.com](mailto:citizenshiponline.bpsos@gmail.com).

Buena suerte,

## VI. GMHC Sample Messaging



### To introduce GMHC & VR:

To: Applicant

From: Citizenshipworks

Subject: [Applicant's Inquiry to Citizenshipworks]

Hi [Applicant],

Thank you for contacting the Citizenshipworks Team. Our nonprofit partner GMHC can help you with [inquiry] over the phone.

Right now, legal experts at our partner GMHC are offering free legal consultations over the phone to Citizenshipworks users across the country. During the consultation, a legal expert can check over your application and guide you through next steps. There is no fee for their services. Would you like help from GMHC?

- The Citizenshipworks Team

### If applicant interested:

To: Applicant

From: Citizenshipworks

Subject: [Applicant's Inquiry to Citizenshipworks]

Hi [Applicant],

Great! In a separate email, I will connect you with GMHC and send you further instructions. You can reply to this message if you have any questions.

- The Citizenshipworks Team

**To connect applicant with GMHC:**

To: Applicant, GMHC

From: Citizenshipworks

Subject: Citizenshipworks Applicant: [Applicant's Name]

Hi [Applicant],

I am connecting you with Vishal, the legal expert who works with our partner organization GMHC, for a free phone or video consultation to finish your citizenship application. Before Vishal can review your application, please:

1. Read GMHC's legal service agreement (attached) and reply-all "I agree" if you agree to the terms.
2. Choose a time for your consultation from Vishal's calendar: <https://calendly.com/vishal-t-1>.

Let me know if you have any questions.

- The Citizenshipworks Team

**OR**

To: Applicant, GMHC, Citizenshipworks

From: Referral Partner

Subject: Citizenshipworks Applicant: [Applicant's Name]

Hi GMHC,

Copied on this email is [Applicant] whose application is ready for review. [Applicant] has read and agreed to GMHC's legal service agreement.

[Any questions or concerns from referral partner or applicant: red flags, missing info, fee waiver, etc.]

[Any logistical concerns for applicant: preferred language, preferred method of communication, unique schedule, etc.]

- Referral Partner

*On any other email communications between GMHC and Applicant before or after the consultation(s), GMHC will exclude the Citizenshipworks Team (and the Referral Partner if applicable).*

**To conclude VR:**

To: Applicant, Citizenshipworks, Referral Partner if applicable

From: GMHC

Hi [Applicant],

It was a pleasure speaking with you today. This concludes the review of your application.

Please remember to print and sign the application [and fee waiver]. [Filing instructions specific to applicant: which documents to include, how to pay the fee, which mailing address to use, etc.]. We recommend sending the application certified mail.

If you have any issues with accessing or printing your application, please reply to this email to reach Connie from the Citizenshipworks Team.

We wish you the best of luck in your journey toward citizenship.

-GMHC

## VIII. Advancing Justice - LA Sample Messaging (English + Spanish)

### Citizenshipworks Opt-in Email

Subject: [Name], Get a Free Legal Consultation!

Dear [Name],

Do you have questions about your citizenship application? Do you want to know if you qualify for a fee waiver for the \$725 application fee?

Our partner Advancing Justice-LA can:

- Answer your citizenship questions
- Help you complete your application
- Review your completed application
- Explain how to file
- Provide fee waiver information and help you complete the form

Advancing Justice-LA is a trusted nonprofit organization that has attorneys and accredited representatives who speak many languages, including Spanish, Tagalog and Mandarin.

If you wish to receive these free services, please reply YES to this email, and Advancing Justice-LA will contact you directly about your Citizenshipworks application. Or you can call Advancing Justice-LA's toll-free legal helpline directly:

English/Spanish 877-466-8160

Sincerely,

Connie  
The Citizenshipworks Team

*This is a limited time offer and does not guarantee services. By replying "Yes" to this email, you agree to give Citizenshipworks permission to share your contact information and answers to the Form N-400, Application for Naturalization, with Advancing Justice - Los Angeles. (Citizenshipworks is a project of Pro Bono Net.) For more information about Advancing Justice - LA please visit [www.advancingjustice-la.org](http://www.advancingjustice-la.org).*

### Welcome Email

Hi [Applicant Name] --

I am an [attorney or DOJ Accredited Representative] with Advancing Justice - LA, and I am following up on your request through Citizenshipworks to receive citizenship assistance.

It looks like you are very close to finalizing your application, and I would be happy to review your application with you and answer any questions that you have. Please let me know when is a convenient time for me to call you.

I look forward to hearing from you.

Thank you,

## Follow-Up Email

Hi [Applicant Name] --

I am writing to follow-up on your request to receive assistance with your citizenship application. Please let me know when you are available to connect by phone

.As mentioned, we are available to help you finalize your application and address any questions that you may have.

I look forward to hearing from you.

Thank you,

## Final Attempt Email

Hi [Applicant Name] --

I am an [attorney or DOJ Accredited Representative] with Advancing Justice - LA, and you were referred to us by our partner Citizenshipworks.

I have tried reaching you by [phone and/or email] to follow-up regarding your citizenship application that you started on Citizenshipworks. Unfortunately, I have been unable to reach you.

This will be my last attempt to contact you. If you have any questions or still need assistance, please feel free to contact me directly when you are ready. I can be reached at [email address and phone number].

Best of luck,

## Sample Script Explaining Services

Our services are completely free. We are a non-profit organization that is part of a national effort to help more lawful permanent residents become U.S. citizens. We are able to assist applicants outside of California, where we are based, as long as there are no complex state law issues in your case. If any arise as we review your case, we would do our best to refer you to a local service provider for assistance.

Once you complete your application using the Citizenshipworks online platform, we can schedule a time for us to review your application together via video chat using the platform. If you get stuck as you complete your application, you can reach out to me and I can address any questions.

Also, if you are unable to afford the USCIS application filing fee at this time, we can discuss your situation to determine whether you are eligible for a fee waiver for the filing fee.

## Service Agreement Email After Opt-In

Hi [Applicant Name] --

It was nice speaking with you by phone today. As promised, here is the Service Agreement that you will need to review and sign before our scheduled appointment to review your application together over video chat. The purpose is to make clear the scope of our legal services and our roles.

Please review and feel free to reach out if you have any questions or concerns about signing the agreement.

Thank you,

## Videochat Instructions Via Email

Hi [Applicant Name] --

We are scheduled to connect over video chat on [Date] at [Time]. As we have discussed, please make sure to log in to your Citizenshipworks account from your computer at the scheduled time, so that I am able to initiate a video chat with you directly through Citizenshipworks. You may need to allow Citizenshipworks to access your camera and microphone by clicking "allow" in order for the videochat to connect. Also, please make sure to use Google Chrome or Firefox as your browser as other browsers may not work properly with Citizenshipworks.

[Alternatively, provide Zoom information if Applicant needs to use mobile device for videochat legal review session. Applicant will need to download app, and I will send Zoom meeting invite information via email that has the link to join the videochat.]

Please let me know if you have any questions. I look forward to connecting with you soon.

Best,

## Initial Attempt Via Text Messaging

This is [Name] from Advancing Justice - LA regarding your Citizenshipworks application. May we text you to schedule a phone call to help you finalize your application?

Text STOP to opt-out of texts.

Please note that this number is only monitored during business hours and to be used for scheduling purposes only.

Staff Guidelines for Texting:

1. Copy and paste SMS thread in CMS
2. Periodically delete all client communications (1x week)
3. Do not provide legal advice via SMS without prior approval

## Spanish Versions

### Citizenship Works Opt-in Email

Subject: [Name], ¡Obtenga una Consulta Gratis!

Estimado/a [Name],

¿ Tiene Preguntas acerca de su solicitud de ciudadanía?

¿Quiere saber si califica para una excepción de tarifa del costo de \$725 que cobra inmigración para la tramitación?

Nuestros socios de Advancing Justice-LA pueden:

- Responder sus preguntas de ciudadanía
- Ayudarle a completar su solicitud de ciudadanía
- Revisar su solicitud completa
- Explicarle cómo enviar su solicitud
- Proveer información de la excepción de pago y ayudarle a llenar el formulario

Advancing Justice-LA es una organización sin fines de lucro de confianza que cuenta con abogados y representantes acreditados que hablan varios idiomas incluyendo español, tagalo, y mandarín.

Si usted desea recibir estos servicios gratuitos, por favor responda **SÍ** a este correo electrónico, y Advancing Justice-LA se comunicara con usted directamente acerca de su solicitud en Citizenshipworks. También puede llamar al número gratuito de Advancing Justice- LA al:

Ingles/Español 877-466-8160

Atentamente,

Connie

El Equipo de Citizenshipworks

*Esta oferta es por tiempo limitado y no garantiza servicios. Al responder "Sí" a este correo electrónico, usted está de acuerdo con darle permiso a Citizenshipworks compartir su información de contacto y respuestas en su formulario N-400, Solicitud de Ciudadanía, con Advancing Justice-Los Angeles. (Citizenshipworks es un proyecto de Pro Bono Net.) Para más información de Advancing Justice - LA por favor visite [www.advancingjustice-la.org](http://www.advancingjustice-la.org).*

### Welcome Email

Hola [Applicant Name]

-- Soy [una abogada or Representante Acreditada del Departamento de Justicia] con Advancing Justice - LA, y le estoy dando seguimiento a su petición para recibir asistencia de ciudadanía por medio de Citizenshipworks.

Al parecer usted está muy cerca de finalizar su solicitud, y con mucho gusto me gustaría revisar su solicitud con usted y responder cualquier pregunta que usted tenga. Por favor hágame saber cuando es conveniente para usted aceptar una llamada.

Espero su respuesta.

Gracias,

### Follow- Up Email

Hola [Applicant Name]--

Le estoy escribiendo para darle seguimiento a su petición para recibir asistencia con su solicitud de ciudadanía. Por favor indique cuando tiene disponibilidad para comunicarnos con usted por teléfono.

Como he mencionado, estamos disponibles para ayudarle a finalizar su solicitud y responder cualquier pregunta que tenga.

De nuevo, espero su respuesta.

Gracias,

## Final Attempt Email

Hola [Applicant Name]--

Soy [una abogada or Representante Acreditada del Departamento de Justicia] con Advancing Justice - LA, y fue referida/o a nosotros por Citizenshipworks.

He intentado comunicarme con usted por [teléfono y/o correo electrónico] para darle seguimiento en referencia a su solicitud de ciudadanía que comenzó en Citizenshipworks. Desafortunadamente, no he podido comunicarme con usted.

Este será mi último intento para comunicarme con usted. Si usted tiene alguna pregunta o todavía necesita asistencia, por favor comuníquese conmigo directamente cuando esté preparado/a. Se puede comunicar conmigo al [email address and phone number].

Le deseo suerte,

## Sample Script Explaining Services

Nuestros servicios son completamente gratis. Somos una organización sin fines de lucro que es parte de un esfuerzo nacional para ayudar a más residentes permanentes convertirse en ciudadanos estadounidenses. Podemos asistir a nuestros solicitantes fuera de California, en donde estamos basados, siempre y cuando no haya problemas complejos de leyes estatales en su caso. Si surge alguno mientras revisamos su caso, haremos todo lo posible para referirle a un proveedor de servicios local para que le ayude.

Una vez que complete su solicitud utilizando la plataforma en línea de Citizenshipworks, podemos programar una cita para que revisemos su solicitud juntos a través de videoconferencia utilizando la plataforma. Si al completar su solicitud tiene algún problema o una pregunta, puede comunicarse conmigo y puedo responder cualquier pregunta.

Además, si no puede pagar la tarifa de presentación de la solicitud de USCIS en este momento, podemos analizar su situación para determinar si es elegible para una exención de la tarifa de presentación.

## Service Agreement Email After Opt-In

Hola [Applicant Name] --

Me dio mucho gusto hablar con usted hoy. Como habíamos quedado, aquí está el acuerdo de servicio que necesita revisar y firmar antes de nuestra cita programada para la revisión de su solicitud por videoconferencia. El propósito de este acuerdo es dejar claro el alcance de nuestros servicios legales y nuestros roles.

Por favor revise el acuerdo y no dude en comunicarse conmigo si tiene alguna pregunta o inquietud de firmar el acuerdo.

Gracias,



## Videochat Instructions Via Email

Hola [Applicant Name] --

Tenemos programada una cita para conectarnos por videoconferencia el [Date] a las [Time]. Como le he mencionado, por favor asegúrese de ingresar a su cuenta de Citizenshipworks por su computadora a la hora de nuestra cita, para que pueda iniciar nuestra videoconferencia directamente desde Citizenshipworks. Es posible que deba permitir que Citizenshipworks acceda a su cámara y micrófono haciendo clic en "permitir" para que el videochat se conecte. Además, asegúrese de usar Google Chrome o Firefox como su navegador, ya que otros navegadores pueden no funcionar correctamente con Citizenshipworks.

[Alternatively, provide Zoom information if Applicant needs to use mobile device for videochat legal review session. Applicant will need to download app, and I will send Zoom meeting invite information via email that has the link to join the videochat.]

Por favor hágame saber si tiene alguna pregunta. Espero conectarme con usted pronto.

Atentamente,

## Initial Attempt Via Text Messaging

Buenas, se comunica [Name] de la organización Advancing Justice- LA, referente a su solicitud de ciudadanía por Citizenshipworks. ¿ Le podremos enviar mensajes de texto para programar una cita para hablar con usted por teléfono para ayudarle a finalizar su solicitud?

Responda 'STOP' dejar de recibir mensajes.

Por favor tome en cuenta que este número solo es monitoreado durante horarios de trabajo, y es solo utilizado para facilitar la programación de llamadas telefónicas.

Staff Guidelines for Texting:

- 1.Copy and paste SMS thread in CMS
- 2.Periodically delete all client communications (1x week)
- 3.Do not provide legal advice via SMS without prior approval

## IX. Advancing Justice - LA Limited Service Agreement (English + Spanish)



### LIMITED SERVICES AGREEMENT

I understand and agree to the following:

1. Asian Americans Advancing Justice – Los Angeles' (AAAJ-LA's) assistance is limited to review of my application for naturalization (N-400) through the online platform Citizenshipworks. AAAJ-LA is not representing me in any capacity.
2. AAAJ-LA is not responsible for any outcome or decision made by the United States Citizenship and Immigration Services (USCIS) in connection with my application for naturalization.
3. I am responsible for paying all USCIS filing fees, mailing all forms, meeting filing deadlines, preparing and appearing for any USCIS interviews in connection with my application for naturalization.
4. I am responsible for providing information and documents that are true, accurate, complete, and current to the best of my knowledge. AAJ-LA's accurate assessment of my eligibility for naturalization depends on the accurate information that I provide. Specifically, if I fail to provide accurate information regarding my immigration history, failure to pay taxes, and interactions with law enforcement, including any arrests, citations, detentions, and convictions in and outside of the United States, USCIS may deny my application for naturalization and possibly refer me for deportation. If I provide false information, I may also expose myself to criminal and other liability.
5. Authorized AAAJ-LA staff are licensed attorneys or authorized representatives in the state of California. I understand that AAAJ-LA may only be able to assess state-related legal issues for the state of California and federal immigration law. If I have any state-related legal issues in connection with my eligibility for naturalization that arise outside of the state of California, AAAJ-LA may not be able to review fully my application for naturalization.
6. AAAJ-LA may decline assistance in reviewing my application for naturalization if my case is not within the scope of their legal services or for any other reason.
7. AAAJ-LA may discontinue assistance if:
  - a. Authorized AAAJ-LA staff determine that I am ineligible for naturalization;
  - b. I fail to provide AAAJ-LA with requested information and/or documents to assess my eligibility for naturalization; and/or
  - c. I am unable or unwilling to complete my Citizenshipworks application as requested by AAAJ-LA.
8. I agree to give AAAJ-LA permission to access my Citizenshipworks account and contact me through my account, by email, and by phone. I also agree to give AAAJ-LA permission to share with Citizenshipworks limited information about whether my case is pending or closed with AAAJ-LA. Citizenshipworks may follow-up with additional messages.
9. I can terminate this agreement at any time.

\_\_\_\_\_  
Name (printed)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## ACUERDO DE SERVICIOS LIMITADOS

### Yo entiendo y estoy de acuerdo con lo siguiente:

1. La asistencia de Asian Americans Advancing Justice - Los Angeles (AAAJ-LA por sus siglas en inglés) está limitado a revisión de mi aplicación de naturalización (N-400) por la plataforma en línea, CitizenshipWorks. AAAJ-LA no me representa en ninguna capacidad.
2. AAAJ-LA no es responsable por ningún resultado o decisión de "United States Citizenship and Immigration Services "(USCIS por sus siglas en inglés) en conexión con mi aplicación de naturalización.
3. Soy responsable de pagar todos los honorarios de USCIS, enviar todos los documentos que sean solicitados para mi aplicación, cumplir con todos los plazos de presentación, preparar y presentarme para cualquier entrevista de USCIS en relación con mi solicitud de naturalización.
4. Soy responsable de proporcionar información y documentos que son verdaderos, exactos, completos y actuales de acuerdo a mi conocimiento. La evaluación de mi elegibilidad por AAAJ-LA depende de la información exacta que proporcione. Específicamente, si no proporcionó información precisa de mi historia de inmigración, la falta de pago de impuestos, e interacciones con las autoridades policiales, incluido cualquier arresto, citación, detención y condenas dentro y fuera de los Estados Unidos, USCIS puede negar mi solicitud de naturalización y posiblemente referirme a proceso de deportación. Si proporciono información falsa, también puedo exponerme a sanciones criminales.
5. Los empleados autorizados de AAAJ-LA son abogados licenciados o representantes autorizados en el estado de California. Yo entiendo que AAAJ-LA solo podrá asesorar cuestiones jurídicas relacionadas al estado de California y ley federal de inmigración. Si tengo cuestiones jurídicas relacionadas en conexión con mi elegibilidad para naturalización que está en un estado fuera de California, es posible que AAAJ-LA no pueda revisar mi solicitud de naturalización completamente.
6. AAAJ-LA puede rechazar su asistencia si mi caso no está dentro del alcance de sus servicios legales o por cualquier otra razón.
7. AAAJ-LA puede discontinuar asistencia si:
  - a. Empleados autorizados de AAAJ-LA determinan que soy ineligible para naturalización;
  - b. Yo fallo en proporcionar AAAJ-LA con información y/o documentos solicitados para evaluar mi elegibilidad para naturalización; y/o
  - c. No puedo o no estoy dispuesto a completar mi aplicación de Citizenshipworks solicitado por AAAJ-LA.
8. Acepto dar a AAAJ-LA permiso para acceder mi cuenta de Citizenshipworks y contactarme por medio de mi cuenta, por correo electrónico, y/o por teléfono. También estoy de acuerdo con darle permiso a AAAJ-LA para compartir información limitada con Citizenshipworks para determinar si mi caso sigue pendiente o ha sido cerrado con AAAJ-LA. Citizenshipworks podrá brindar seguimiento con mensajes adicionales.
9. Puedo terminar este acuerdo en cualquier momento.

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**Nombre Completo**

---

**Firma**

---

**Fecha**

## X. GMHC Limited Service Agreement (English + Spanish)



Thank you for choosing Citizenshipworks to help you on your path to becoming a U.S. citizen! For a limited time, we've partnered with GMHC to provide a free consultation via telephone, email, or video to assist Citizenshipworks users in completing their N-400, Application for Naturalization.

By enrolling with GMHC for free legal assistance, you agree to the following:

- I agree that the attorney review of my Citizenshipworks application is limited in scope, and that neither GMHC nor any GMHC staff member is representing me in any capacity whatsoever.
- I agree that the assistance provided is based solely on my ability to provide complete and truthful information.
- I understand that GMHC assumes no responsibility for the outcome of my case, cannot guarantee results, and that I am responsible for all aspects of my case, including but not limited to paying the filing fees, mailing the forms, meeting all filing deadlines, preparing for my interview, and appearing at all interviews.
- I understand that GMHC reserves the right to decline this limited scope legal assistance if they have a conflict of interest, if my case is not within the scope of the legal services they provide, or for any other reason.
- I agree to give GMHC permission to access my Citizenshipworks account and to contact me through my account, by email, or by phone.

¡Gracias por escoger a Citizenshipworks para ayudarle en su camino hacia convertirse en ciudadano americano! Por tiempo limitado, hemos colaborado con la organización sin fines de lucro GMHC para ofrecer una consulta gratuita por teléfono, email o video que asistirá a usuarios de Citizenshipworks a completar su N-400, Solicitud para Naturalización.

Al registrarse con GMHC para asistencia legal gratuita, usted está de acuerdo con lo siguiente:

- Yo estoy de acuerdo que la revisión por parte del abogado/a de mi aplicación de Citizenshipworks es limitada y que ni GMHC, ni ningún miembro del personal de GMHC me está representando en ninguna manera.
- Yo estoy de acuerdo que la asistencia que me ofrecen está basada solamente en mi habilidad de proveer información completa y verdadera.
- Yo entiendo que GMHC no asume responsabilidad por el resultado de mi caso, que no garantizan resultados y que yo soy responsable por todos los aspectos de mi caso legal, incluyendo, pero no limitado al pago de los costos de cada aplicación/petición, el costo de envío de formularios, el cumplir con todas las fechas límites, la preparación para mi entrevista y asistiendo a todas mis entrevistas.
- Yo entiendo que GMHC reserva el derecho a negarme esta asistencia legal limitada si tienen un conflicto de interés, si mi caso no está dentro de los servicios legales provistos que ofrecen o por cualquier otra razón.
- Yo estoy de acuerdo en darle a GMHC el permiso de tener acceso a mi cuenta de Citizenshipworks y de contactarme por medio de mi cuenta, email o teléfono.

## XI. IRC-Atlanta Limited Scope Agreement Pop-Up on Citizenshipworks

“The International Rescue Committee (IRC) is excited to be part of your journey towards becoming a U.S. Citizen. The IRC is a nonprofit organization that provides legal services to eligible immigrants. For a limited time, we are partnering with [name of CBO partner] to provide free consultation via telephone, e-mail or video to assist with your citizenship application via Citizenshipworks. By enrolling with IRC’s for free legal assistance, you agree to the following: I agree that an IRC staff member will contact me with follow-up questions, complete incomplete sections of the application, and an IRC DOJ accredited staff will conduct a legal review of my application. I agree the legal review provided is based solely on my ability to provide complete and truthful information. I understand that IRC assumes no responsibility for the outcome of my case, cannot guarantee results, and that I am responsible for all aspects of my case, including but not limited to paying the filing fees, mailing the forms meeting all filing deadlines, preparing for my interview, and appearing at all interviews. I understand that IRC reserves the right to decline this limited scope legal assistance if there is a conflict of interest, if my case is not within the scope of the legal services provided, or for any other reason. I agree to give IRC permission to access my Citizenshipworks account and to contact me through my account, by email or by phone. Please complete at least 90% of your application of naturalization in Citizenshipworks to schedule a legal review appointment with IRC staff.”

## XII. Legal Review Guidelines

### 1. ADJUSTMENT OF STATUS HISTORY

- Confirm eligibility basis
- Confirm any adjudication issues

### 2. CRIMINAL HISTORY

- Confirm any contact with law enforcement
- **PART 12, PAGE 14, Questions 22-29:** The chart in Question 29 should depict the details of Applicant's Criminal History. *This includes traffic tickets (moving citations).*
- General Rule: if Applicant only has traffic violations and has paid the corresponding fines, application is OK but tickets must still be listed.
- **Anything beyond a traffic violation, such as a DUI, please flag for Supervisor.**

### 3. RESIDENCE + EMPLOYMENT HISTORY

- Look for any time gaps within the past 5 years (or 3 years for if applying based on Marriage to USC)
- Residence History, **PART 5, PAGES 3-4**
- Employment or School History, **PART 8, PAGE 6**
  - Use “Unemployed” when there are gaps in employment
  - Use Continuation Sheets if additional space is needed

### 4. TRAVEL HISTORY for past 5 years is completed at **PART 9, PAGE 7**

- Make sure Applicant has sufficient *Physical Presence*. Total number of days outside US must be less than:
  - 913 days for 5 year LPR
  - 548 days for 3 year LPR
- Make sure Applicant has not taken a single trip longer than 6 months.  
**Flag for Supervisor if there is an extended trip of more than 6 months.**

### 5. CONFIRM YES/NO QUESTIONS, PART 12, Questions 1-44.

**Flag for Supervisor if there are “YES” answers in Part 12.**

- Did you understand all of the yes/no questions?
  - If not: explain the questions client had difficulty understanding
- Did you answer all of the yes and no questions truthfully?
  - If not: explain that lying to USCIS may lead to rejection of the application and prosecution for perjury
- Have you paid taxes every year since you became an LPR (even years you did not work)
  - If not: ensure that client did not fail to file taxes that they were required to pay. If the failure to file is because they did not earn enough money, please mark “yes” on Part 12 Question 7A and ensure that a continuation sheet is attached.

- Have you ever had problems with the IRS?
  - Do you owe any overdue taxes?
    - If yes: please mark “yes” on Part 12 Question 6. Ensure that client is on a payment plan and remind them to bring evidence of such a plan or proof of payment of all overdue taxes to their naturalization interview.
  - Have you ever been a member of any groups/clubs/organizations/churches?
  - Positive affiliations, include them in Part 12, Question 9B.
  - Have you ever been a member of an army or the police?
    - If yes, please mark “yes” on Part 12 Question 15 (Box A or C) and make sure a continuation sheet has been attached
  - (If client’s minor child does not live with them): Do you provide financial support for your child?
    - Remind applicant to bring proof of child support (even if informal) to interview
    - If client does not support their minor child, please mark “yes” on Part 12 Question 30H and inform them that they may be denied naturalization.
  - Pay special attention to:
    - **Question 7A:** Make sure Applicant has filed taxes EVERY YEAR regardless of whether it was required or not. If they did not file during any year, attach a continuation sheet.
    - **Questions 15, 19:** Some countries have compulsory Military Service. Ensure military tenure dates are accurate.
    - **Questions 30i, 31, 32:** Make sure Applicant has never misrepresented facts or submitted fraudulent documentation to a U.S. government official, or lied to gain entry into the US.
    - **Questions 33-36:** Please inquire of any history of deportation, immigration court, etc.
    - **Question 44:** Inquire whether a Male Applicant between 18-26, registered for US Selective Service. Selective Service: All men 18-26 who live in the United States (except those who are here on a non-immigrant visa, such as visitors or students) are required to register for Selective Service. If the Applicant lived in the U.S. between those ages and did not register, please make sure a continuation sheet has been attached. If they are under 31 (or 29 if married to a US citizen), they will also need to request a Status Information Letter from the Selective Services.
- 6. FEE WAIVER/REDUCED FEE:**
- Applicant may qualify for a fee waiver using **Form I-912** if receiving:
    - (1) MEANS-TESTED BENEFIT: Need verification of benefits letter from agency such as Medi-Cal, CalFresh, Supplemental Security Income SSI, etc.  
OR
    - (2) INCOME BELOW 150 % of the Federal Poverty Guidelines (most recent tax return)
  - Applicant qualifies for a reduced fee if household income is between 150% and 200% of the Federal Poverty Guidelines. Please use **Form I-942**.
    - Applicant pays \$405 if <75 years old, \$320 if >75. Submit most recent tax returns as supporting evidence.

## XIII. Advancing Justice - LA Client Closing Letter with Self-Filing Instructions (English + Spanish)



February 4, 2020

Dear [Applicant]:

We have now completed review of your naturalization application, and your application is ready to file with U.S. Citizenship and Immigration Services (USCIS). As discussed, you will be responsible for filing your own application.

Please make sure all of the USCIS forms are signed and dated, and it should be assembled in this order:

**1. Filing fee**

- a. Check or money order for \$725, payable to "U.S. Department of Homeland Security," with A-number on memo line

**2. N-400 Application for Naturalization**

**3. Copy of permanent resident card ("green card"): front and back**

You should also make a copy of everything you are sending to USCIS for your records and also to help you prepare for your interview. We recommend you mail the application using U.S. Postal Service Certified Mail with Return Receipt, which provides you with proof of mailing and delivery to USCIS.

USCIS  
P.O. Box 21251  
Phoenix, AZ 85036

Your case with our office is now closed. If you have any questions about your application or about the citizenship process, please feel free to contact us again.

Please note that we will be emailing you a feedback survey shortly. In the meantime, please feel free to share any feedback about your experience working with us and our services and by emailing [virtualreview@advancingjustice-la.org](mailto:virtualreview@advancingjustice-la.org).

It was a pleasure working with you, and we wish you the best of luck!

Sincerely,

Carolyn Kim, Esq.

Thank you for the opportunity to help you with your Application for Naturalization (Form N-400). We hope you found our service professional, courteous, and helpful. Please review the following information so you know what to expect after your application is filed and how to prepare for each step. Keep a copy of your N-400, all original U.S. Citizenship & Immigration Services (USCIS) receipts and notices, and any supporting documents for your citizenship application in a safe place.xxx

## NATURALIZATION STEPS

Exact processing times will depend on where you live, but USCIS will mail you notices for each of the steps below, so if you change your mailing address, see instructions on the next page. Also, note that time ranges given below are estimates based on information provided by USCIS and subject to change. For up-to-date processing time information, see: <https://egov.uscis.gov/processing-times/>.

### 1. RECEIPT

Within 2 to 4 weeks of filing, you will receive a receipt notice titled “Notice of Action” which serves as proof that USCIS has accepted your application for filing. Note: if you submitted a fee waiver request with your application, it may take longer for USCIS to issue a receipt notice. The Notice will include your receipt/case number (a 13-character number starting with 3 letters, e.g., “IOE1234567890”) which you will need if you have to contact USCIS regarding your application.

### 2. BIOMETRICS

Shortly after you receive the receipt notice, you will receive a “biometrics” appointment notice, which will tell you when and where to go to have your fingerprints and photos taken. If you miss the appointment or cannot make it at the assigned time, follow the instructions on the notice to reschedule your appointment. Do not ignore the notice, even if you cannot attend. If you fail to attend your biometrics appointment, it could result in delays in your application or USCIS could deem your application abandoned.

### 3. INTERVIEW

Approximately 5 to 8 months after your fingerprints are taken, you will receive notice of your naturalization interview. The notice will explain when and where your interview is and what information and documents to bring. At the interview, a USCIS officer will review your N-400 with you to make sure that 1) all the information on the form is still accurate and up-to-date and 2) you meet all the requirements for citizenship, including an ability to understand and speak English. If any of the information on your application has changed since we prepared it, notify the officer so they can correct it. The officer will ask you to read and write a sentence in English and give you a test on U.S. government and history (“civics”). Review the information in the USCIS study guide, “Learn About the United States,” to prepare for the English and civics exams. Additional study resources are available here:

<https://www.uscis.gov/citizenship/learners/study-test>

<https://www.usalearns.org/usa-learns-citizenship>

If you pass your interview, you will be invited to attend an oath ceremony to become a U.S. citizen. If you do not pass, the officer will give you a paper explaining why – you may have to send in more documents or take the English and/or civics test again.

### 4. OATH CEREMONY

The last step of the naturalization process is your oath ceremony, where you take your oath of allegiance to the U.S. and become an American citizen. Ceremonies are generally scheduled 1-2 months after passing the interview. Remember that you are not a U.S. citizen until you attend the ceremony; you may NOT vote or register to vote in any election, get a passport, etc., until after you become a U.S. citizen.



## UPDATES AND QUESTIONS ABOUT YOUR CASE

If you wish to check the status of your case, go to [www.uscis.gov](http://www.uscis.gov) > “Check Case Status.” On this page, enter your case (“receipt”) number without any spaces and click “Check Status.” You will receive the latest information about your case.

If you think your case is taking longer than it should, you can check the USCIS processing times to see if it is delayed at <https://egov.uscis.gov/processing-times/>. The processing time shows how long it takes that office to process most N-400s and is listed as a range of time (for example, “10.5 to 13 months”). If you’ve been waiting longer than the processing timeframe, your case may be delayed. Follow up with USCIS by calling their Customer Service at (800)375-5283. Alternatively, you may submit a “case inquiry” with USCIS online at <https://egov.uscis.gov/e-Request/Intro.do> for further assistance with your case.

## ADDRESS CHANGE

If you change your mailing address during the application process, notify USCIS by doing one of the following:

- Report the address change at <https://egov.uscis.gov/coa/displayCOAForm.do>, or
- File a Change of Address (Form AR-11, available at [www.uscis.gov/ar-11](http://www.uscis.gov/ar-11)), or
- Call them at (800) 375-5283

## END OF SERVICE

Upon completion of your N-400, our service to you has ended and your case with our office is now closed. However, if you have any questions about your application or about the citizenship application process, please feel free to call us at 877-466-8160. We wish you all the best in your journey to become a U.S. Citizen. It has been our honor to serve you.



[Date]

Estimada [NAME]:

Ya hemos completado la revisión legal de su solicitud de ciudadanía, y su solicitud está lista para ser enviada a inmigración (U.S. Citizenship and Immigration Services o USCIS por sus siglas en inglés). Usted es responsable por enviar su propia solicitud, y deberá enviar los documentos en el orden siguiente:

1. Formulario I-912 excepción de cuotas
  - a. Con una copia de sus impuestos del 2019 (formulario 1040)
2. La solicitud de naturalización N-400
3. Una fotocopia de su tarjeta de residencia de los dos lados (de frente y detrás)
4. Una copia del certificado de naturalización de su esposo y
5. Una copia de su acta de matrimonio

Por favor asegúrese de que todos los formularios estén firmadas y fechadas. También, debe obtener una copia para guardar en su archivo y para ayudarle a preparar para su entrevista. Recomendamos que envíe su solicitud utilizando el **servicio certificado del correo postal con recibo**, esto comprueba el envío y la entrega de su solicitud a inmigración (USCIS).

USCIS  
USCISP.O. Box 660060  
Dallas, TX 75266

Su caso con nosotros ha culminado y ha sido cerrado. Si tiene alguna pregunta sobre su solicitud, el proceso de naturalización, o el proceso para enviar su solicitud, por favor comuníquese con nosotros de nuevo.

Por favor tome en cuenta que se le enviará una encuesta brevemente. Mientras, por favor siéntase con la libertad de compartir cualquier comentario o sugerencia de su experiencia al trabajar con nosotros y nuestros servicios; enviando un correo electrónico al [virtualreview@advancingjustice-la.org](mailto:virtualreview@advancingjustice-la.org).

Atentamente,

Citizenship Virtual Review Project

Gracias por darnos la oportunidad de servirle y poder ayudarle con su aplicación de naturalización (formulario N-400). Esperamos que usted haya tenido una experiencia profesional, cortés, y que nuestros servicios le hayan servido de ayuda. Por favor revise la siguiente información para que usted sepa qué esperar después de que su solicitud sea enviada a inmigración y cómo prepararse para cada paso. Mantenga una copia de su solicitud N-400, todos los recibos y notificaciones originales de inmigración o United States Citizenship and Immigration Services ( USCIS, por sus siglas en inglés), y cualquier documentación suplente a su solicitud en un lugar seguro.

## PASOS DE LA NATURALIZACIÓN

El tiempo de tramitación exacta depende de donde usted vive, pero USCIS le enviará notificaciones para cada de los siguientes pasos, así que si su dirección cambia, por favor vea las instrucciones en la próxima página. También, tome en cuenta que el tiempo de tramitación mencionados son estimados basado en la información proveída por USCIS y son sujetos a cambios. Para información de tiempos de tramitación más actualizadas por favor visite, <https://egov.uscis.gov/processing-times/>.

### 1. RECIBO

Dentro de 2 a 4 semanas de haber enviado su solicitud, usted recibirá un recibo titulado “Notice of Action” cual sirve como prueba de que USCIS recibió y aceptó su solicitud. Nota: Si usted envió una excepción de cuota con su solicitud, puede tomar un poco más en USCIS emitir su recibo. La notificación incluirá su número de recibo/ número de caso (un número con 13 dígitos empezando con 3 letras, ejemplo: “IOE1234567890”) que usted necesita ocupa comunicarse con USCIS acerca de su solicitud.

### 2. HUELLAS/ "BIOMETRICS"

Brevemente, después de recibir su recibo, recibirá una cita para las huellas, titulada “Biometrics,” que le indicará cuando y donde debe ir para que le tomen su fotografía y sus huellas. Si usted no asiste a la cita o no puede asistir a la cita programada, siga las instrucciones en la notificación para reprogramar su cita. No ignore la notificación, aunque no pueda asistir. Si no asiste a la cita, puede resultar en demoras con su solicitud o USCIS podrá considerar su solicitud abandonada.

### 3. ENTREVISTA

Aproximadamente 5 a 8 meses después su cita para tomarse las huellas, usted recibirá una notificación citándolo/a para su entrevista de naturalización. La notificación le explicará cuándo y dónde será su entrevista y que información y documentación tiene que llevar. En la entrevista, un oficial de inmigración revisará su solicitud para asegurarse de que 1) toda la información en la solicitud esté correcta y actualizada 2) de que usted cumpla con todos los requisitos para la ciudadanía, incluyendo su habilidad de comprender y hablar inglés. Si alguna información en su solicitud ha cambiado desde que le ayudamos a preparar su solicitud, notifique al oficial para que lo corrijan. El oficial le pedirá que escriba una oración en inglés y le dará un examen cívico de los estados unidos. Revise la información en la guía de estudio de USCIS, “Learn About the United States,” para preparar para el examen. Adicionalmente usted puede encontrar más recursos de estudio en : <https://www.uscis.gov/citizenship/learners/study-test>. Si usted pasa la entrevista, usted será invitado/a a participar en la ceremonia de naturalización para convertirse en ciudadano/a estadounidense. Si no pasa la entrevista, el oficial le dará un documento explicando porque- es posible que tenga que enviar más documentación o tomar el examen de inglés y/o historia de nuevo.

### 4. CEREMONIA DE NATURALIZACIÓN

El último paso del proceso de la naturalización es la ceremonia de naturalización, donde tiene que tomar un juramento de lealtad a los Estados Unidos para convertirse en ciudadano estadounidense. Ceremonias generalmente son programados de 1 a 2 meses después de pasar su entrevista. Recuerde que usted NO es ciudadano hasta que tome la juramentación; No debe registrarse para votar en ninguna elección, obtener un pasaporte, etc. hasta después de que usted se convierta en ciudadano estadounidense.

## ACTUALIZACIONES Y PREGUNTAS ACERCA DE SU CASO

Si usted desea ver el estado de su caso, visite [www.uscis.gov](http://www.uscis.gov) > "Check Case Status". En esta página, ingrese su número de caso (recibo) sin espacios y oprima "Check Status". Usted recibirá la información más actualizada de su caso. Si usted piensa que su caso está demorando más del promedio, puede revisar los tiempos de tramitación con USCIS para ver si esta fuera del tiempo de tramitación en <https://egov.uscis.gov/processing-times/>. El tiempo de tramitación demuestra cuánto tiempo le toma a esa oficina procesar la mayor parte de sus solicitudes N-400, e incluye un rango de tiempo (por ejemplo "10.5 a 13 meses"). Si usted ha estado esperando más de lo indicado su caso puede estar delatado. Por favor comuníquese con USCIS llamando al servicio al cliente al número (800)375-5283. Alternativamente puede ingresar una encuesta "case inquiry" con USCIS en línea al <https://egov.uscis.gov/e-Request/Intro.do> para más asistencia con su caso.

## CAMBIO DE DIRECCIÓN

Si su dirección cambia mientras está usted en el proceso, notifique a USCIS haciendo lo siguiente:

- Reporte el cambio de dirección al <https://egov.uscis.gov/coa/displayCOAForm.do>, o
- Envíe el formulario para cambio de dirección, AR-11 disponible en [www.uscis.gov/ar-11](http://www.uscis.gov/ar-11), o
- Llame al (800)375-5283.

## CONCLUSIÓN DE SERVICIO

Al completar su N-400, nuestro servicio concluye y su caso con nuestra oficina se cierra. Sin embargo, si usted tiene alguna pregunta sobre su solicitud o el proceso de naturalización, por favor llámenos al 877-466-8160. Le deseamos lo mejor en su trayectoria a la ciudadanía. Ha sido un honor servirle.

## XV. BPSOS Client Closing Letter with Self-Filing Instructions and Checklist

Hello Applicant,

I have completed the final legal review of your naturalization application. It is now ready for you to print and sign. Please be sure to review the entire application, Form N-400, again in its entirety. However, note that any changes, electronic, handwritten, or otherwise made to your Form N-400 after this point will not be included in the legal review and may affect the outcome of your naturalization case.

### Mailing Your Application

To mail your application for naturalization, take the following steps:

1. Print your N-400 Form and complete, including signatures.
2. Along with your signed Form N-400, you must include the following enclosures:
  - a photocopy of both sides of your Permanent Resident Card (also known as the “green card”).
  - a check or money order for the application fee and, if applicable, biometrics fee, as outlined in “Filing Fee” on [uscis.gov](https://uscis.gov), with your A-Number written on the back of the check or money order.

Note that you can pay the fees online for no additional fee by following the instructions on [uscis.gov](https://uscis.gov).

Make a photocopy of the entire application plus enclosures to keep for your own reference.

3. Send the original application plus enclosures to the designated address under “Where to File” on [uscis.gov](https://uscis.gov). We recommend sending the application by certified mail, priority mail or other method by which the mailing of the package can be documented.

### Receipt Notice

USCIS will send you a receipt notice, indicating that they have received your application and that it is being processed. The receipt notice will have a receipt number for your application, which you can use to monitor the status of your application online. Once you receive a receipt notice you can check the status of your case on [USCIS CASE STATUS](https://uscis.gov)

### Biometrics

You will receive a letter from USCIS with an appointment for you to appear for fingerprinting at a USCIS Application Support Center. The location and time will be stated on the letter you receive.

### Interview with USCIS (English and Civics Exam)

After you have received your receipt notice and completed your biometrics, you will receive a date, time and place for an interview with a USCIS officer. At the interview, you will be tested on your basic knowledge of English and U.S. history and civics. Here is where you can find the 100 questions [100 Civics Questions and Answers](https://uscis.gov).

Following the interview, you will either receive an invitation to your swearing-in ceremony, at which you will become a United States citizen, or a letter stating the reason for the denial of your application. If you fail the English or U.S. history and civics exam at the first interview, you will receive a new date for a second interview.

### Swearing-In Ceremony/Oath Ceremony

At the swearing-in ceremony, you will take the Oath of Allegiance to the United States and become a U.S. citizen.

I wish you the best of luck with your application. As the review of your application is complete, we will be closing your case in CitizenshipWorks in 48 hours so please reach out to me before that.

Best,

Legal staff

**CHECKLIST (CHECK OFF THE ITEMS THEY NEED ONLY)****N-400 Checklist:**

- Copy of your Permanent Resident Card (green card)-front and back
- Copy of your Driver's License or State Identification Card (ID)-front and back  
(If your current address does not match your DL/ID please change it before attending interview)
- Copy of Social Security Card-front and back
- Completed N-400 application
- Copy of Supporting Documents
  - Birth Certificate
  - Marriage Certificate/Divorce Decree/Spouse's Death Certificate if needed
  - Criminal Records
  - N-648: Medical Certification for Disability Exceptions (Disability Waiver)
  - Additional documents:
    - If it's in another language other than English, provide copy of original and a notarized English translation
- Payment:
  - Check/Money Order payable to: U.S Department of Homeland Security for \$725.00
  - Credit Card: Completed form G-1450
  - If you are 75 years or older, you pay \$640
- \*\*If you are applying with a fee waiver (Form I-912) then you need to send a copy of the following documents:
  - Tax Return
  - W-2
  - 3 months of paychecks

**When Ready to Mail:**

- Make a copy of N-400 application for your records
- \$7.00 in cash to send through certified mail
- Mail to:
  - USCIS
  - P.O Box 660060
  - Dallas, TX 75266

## CHECKLIST (SPANISH)

### Lista de Verificación para N-400

- Copia de su tarjeta de residencia permanente (tarjeta verde)-al frente y detrás
- Copia de su licencia de manejo o su tarjeta de identificación del estado (ID)-al frente y detrás
- Copia de su tarjeta de Seguro Social (Social Security)-al frente y detrás
- Aplicación completa de N-400
- Copia de Documentos de Respaldo
  - Certificado de nacimiento
  - Certificado de matrimonio/ Decreto de Divorcio/Acta de defunción si es necesario
  - Antecedentes Penales (Record Criminal)
  - N-648: Certificación médica para exenciones por discapacidad (Disability Waiver)
  - Documentos adicionales:
    - Si los documentos son en otro idioma que no sea inglés, proporcione una copia del acta original y una traducción en inglés notariada
- Pago:
  - Cheque/Money Order a nombre de: U.S Department of Homeland Security por \$725.00
  - Tarjeta de crédito: Forma completa G-1450
  - Si tiene 75 años o más, solo paga \$640
- \*\*Si está solicitando una exención de tarifas (Formulario I-912), debe enviar una copia de los siguientes documentos:
  - Declaración de impuestos
  - W-2
  - 3 meses de cheques de pago

### Cuando esté listo para enviar:

- Haga una copia de la aplicación N-400 para sus registros
- \$7.00 en efectivo para enviar por correo certificado
- Enviar a:
  - USCIS
  - P.O Box 660060
  - Dallas, TX 75266

## XVII. Applicant Feedback Tools (English + Spanish)

### SAMPLE CLIENT SURVEY

You can complete this survey anonymously. The feedback you provide will be used to improve our legal services to citizenship applicants using the online platform Citizenshipworks.

Advancing Justice - LA is a partner of Citizenshipworks and is a separate legal organization. This survey is related to Advancing Justice - LA's legal services only.

1. What as the main reason you wanted help from Advancing Justice - LA?
  - a.Citizenship eligibility questions
  - b.Naturalization process information
  - c.Fee waiver help
  - d.Review of entire application
  - e.Other \_\_\_\_\_
  
2. Did Advancing Justice - LA staff address all of your citizenship questions?
  - a.Yes
  - b.No
  - c. \_\_\_\_\_
  
3. Rate your overall experience with Advancing Justice - LA.
  - a.Very Good
  - b.Good
  - c.Average
  - d.Poor
  - e.Other \_\_\_\_\_
  
4. How likely are you to recommend Advancing Justice - LA to a friend or family member?
  - a.Very Likely
  - b.Likely
  - c.Somewhat Likely
  - d.Not Likely
  - e.Other \_\_\_\_\_
  
5. Any other feedback and suggestions?
  
6. Name (optional)
  
7. Email (optional)
  
8. May we follow-up with you regarding your responses?
  - a. Yes
  - b. No



### SAMPLE UNRESPONSIVE OPT-IN SURVEY

1. If you no longer need assistance, please tell us why:
  - a. I already submitted my application.
  - b. Someone else is helping me.
  - c. I do not think I am eligible to apply.
  - d. I cannot afford the application fee.
  - e. Other \_\_\_\_\_
2. Any comments or concerns?
3. Name (optional)
4. Email (optional)

### SAMPLE UNRESPONSIVE OPT-IN TEXT

Have you submitted your citizenship application?

Advancing Justice - LA has not heard back from you regarding your citizenship application. If you still need help, please reply and we will call you.

If you no longer need our services, please complete this short survey to help us improve:  
<https://forms.gle/h5vAmpUJqr2QaWD27> [link to Google Form]

Text STOP to opt out of future messages.

### SAMPLE UNRESPONSIVE APPLICANT EMAIL

**Subject:** Have you submitted your citizenship application?

Advancing Justice - LA is a non-profit organization with the [New Americans Campaign](#), a national network of trusted non-profit partners that have helped over 420,000 lawful permanent residents apply for citizenship

Do you still need free legal help with your citizenship application before costs go up? We can also confirm your eligibility for a fee waiver.

- Yes, please contact me.
- No, I no longer need your help.
- I would like to opt-out of future messages.

You can also call or text us at 213.241.0222 for help.

### SAMPLE UNRESPONSIVE APPLICANT TEXT

This is Melissa from Advancing Justice - LA, a non-profit organization partnering with Citizenshipworks.

Do you still need free legal help with your citizenship application before costs go up? We can also confirm your eligibility for a fee waiver.

Reply YES if you want our staff to follow up.  
Reply NO if you no longer need our help.  
Reply STOP to opt out of messaging.

## Spanish Versions

### SAMPLE CLIENT SURVEY

Puede completar esta encuesta anónimamente. Los comentarios que proporcione se utilizarán para mejorar nuestros servicios legales a los solicitantes de ciudadanía utilizando la plataforma en línea Citizenshipworks.

Advancing Justice - LA es socio de Citizenshipworks y es una organización legal separada. Esta encuesta está relacionada exclusivamente con los servicios legales de Advancing Justice- LA.

1. ¿Cuál fue la razón principal por la cual solicitó ayuda de Advancing Justice - LA?
  - a. Preguntas de elegibilidad de ciudadanía
  - b. Información del proceso de naturalización
  - c. Ayuda con la excepción de tarifa
  - d. Revisión de la solicitud completa
  - e. Otro \_\_\_\_\_
  
2. ¿El personal de Advancing Justice - LA puedo contestar todas sus preguntas de ciudadanía?
  - a. Si
  - b. No
  - c. Otro \_\_\_\_\_
  
3. Califique su experiencia general con Advancing Justice - LA.
  - a. Muy Bien
  - b. Bien
  - c. Promedio
  - d. Malo
  - e. Otro \_\_\_\_\_
  
4. ¿Qué posibilidades hay de que recomiende Advancing Justice - LA a un amigo o familiar?
  - a. Muy Probable
  - b. Probable
  - c. Algo Probable
  - d. No Probable
  - e. Otro \_\_\_\_\_
  
5. ¿Algún comentario o sugerencia?
  
6. Nombre (opcional)
  
7. Correo Electronico (opcional)
  
8. ¿Podemos hacer un seguimiento con usted con respecto a sus respuestas?
  - a. Si
  - b. No

## SAMPLE UNRESPONSIVE OPT-IN SURVEY

1. Si ya no necesita asistencia, por favor indique la razón:
  - a. Ya envíe mi solicitud
  - b. Alguien mas me esta ayudando
  - c. No creo ser elegible para aplicar
  - d. No estoy preparado/a para aplicar
  - e. No puedo pagar la tarifa para enviar mi solicitud
  - f. Otro \_\_\_\_\_
2. ¿Algún comentario o sugerencia?
3. Nombre (opcional)
4. Correo Electronico (opcional)

## SAMPLE UNRESPONSIVE OPT-IN TEXT

¿Ya envió su solicitud de ciudadanía?

Advancing Justice - LA no ha recibido una respuesta suya acerca de su solicitud de ciudadanía. Si todavía necesita ayuda, por favor responda y le llamaremos. Si ya no necesita nuestros servicios, complete esta breve encuesta para ayudarnos a mejorar:

<https://forms.gle/h5vAmpUJqr2QaWD27> [link to Google Form]

Responda 'STOP' para dejar de recibir mensajes.

## SAMPLE UNRESPONSIVE APPLICANT EMAIL

**Subject: ¿Ya envió su solicitud de ciudadanía?**

Advancing Justice - LA es una organización sin fines de lucro que trabaja con la campaña nuevos americanos o como es conocido en inglés, New Americans Campaign, una organización a nivel nacional que está asociado con una red de varias organizaciones sin fines de lucro de confianza que en conjunto han ayudado a más de 420,000 residentes solicitar la ciudadanía.

¿Todavía necesita asistencia legal gratuita con su solicitud de ciudadanía antes de que el costo suba? También podemos informarle si califica para un a excepción de pago.

- Si, por favor comuníquese conmigo.
- No, ya no necesito asistencia.
- Ya no me gustaría recibir mensajes

También puede llamarnos o enviarnos un mensaje al [Number ] para asistencia.

## SAMPLE UNRESPONSIVE APPLICANT TEXT

Buenas, habla [Name] de Advancing Justice-LA, una organización sin fines de lucro asociada con Citizenshipworks.

¿Todavía necesita asistencia gratuita con su solicitud de ciudadanía, antes de que suba la tarifa? También podemos determinar si es elegible para una excepción de pago.

Responda SÍ para que alguien de nuestro personal se comunique con usted.  
Responda NO si ya no necesita ayuda.  
Responda STOP para dejar de recibir mensajes.

## XVIII. Advancing Justice - LA Case Tracking Template

NAC Campaign	Staff Assigned	Case Number	First Name	Last Name	Opt-in Date	CW Account Creation Date	CASE STATUS	Email	Phone	Opt-in Method (Phone/Text/Email)

Language	% Complete	State	Red Flags	AJ-LA Welcome Date (Phone/Text/Email)	2nd Attempt (Date)	3rd Attempt (Date)	Final Attempt (Date)	Applicant Initial Response (Date)	Notes	VR Date

Fee Waiver Bases	Highest Level of Services (Current)	Services Completion Date	Declined Reasons	Referral
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
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▼	▼			
▼	▼			
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▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			
▼	▼			

**XIX. IRC - Atlanta Case Tracking Template**

Client Name	First Contact	Second Contact	Legal review first contact	Legal review final contact	Stat us	Consult Provided	Closed on CW	Notes	Entered on ETO

## XX. Reporting Template

		AS OF 2/29/2020	
		TOTAL ALL APPLICANTS	% All Applicants
<b>CW referrals (opt-ins)</b>			
<b>Initial AJ-LA communications</b>			
	Applicant never responded to AJ-LA		
	Established contact with Applicant		
	Applicant stopped responding (no assistance)		
	Applicant stopped responding (with assistance)		
	Declined services (no assistance)		
	Declined services (with assistance)		
	Ongoing communications		
	<b>Subtotal initial AJ-LA comms</b>		
<b>Case management</b>			
	N-400 in progress		
	Post-filing support		
	Applicant ineligible/advised against applying		
	Applicant withdrew/stopped responding (after VR)		
	Applicant referred for complex issue		
	Fileable N400 generated (after VR)		
	<b>Subtotal case mgmt</b>		
<b>TOTAL</b>			
<b>Services provided</b>			
	Provided legal referral		
	Self-filing w. AJ-LA support		
Highest level of service provided	Answer basic natz questions		
Highest level of service provided	Provided application assistance without VR		
Highest level of service provided	Provided legal advice		
Highest level of service provided	Fileable N400 generated		
	<b>TOTAL SERVED</b>		
<b>Fee waiver assistance</b>			
	(TOTAL = FILEABLE N400s)		
	No fee waiver		
	<b>Total fee waivers prepared</b>		
	Partial fee waiver		
	Full fee waiver (MTB)		
	Full fee waiver (HHI)		
	Full fee waiver (FH)		

		AS OF 2/29/2020	
		TOTAL ALL APPLICANTS	% All Applicants
<b>Reasons for declining full scope services</b>			
	(TOTAL = DECLINED SERVICES)		
	Prefer in-person assistance		
	Prefer local/in-state assistance		
	Not ready to file		
	Self-filing		
	Already filed		
	Already found help		
	Not comfortable with technology		
	Other/Unknown/Mistake		



## **BEST PRACTICES TOOLKIT**

*Comprehensive Guide to Remote Citizenship Services*

**PREPARED BY**

The New Americans Campaign and Campaign Virtual Review Partners:  
Asian Americans Advancing Justice - Los Angeles,  
Boat People SOS - Houston, GMHC - New York, and  
International Rescue Committee - Atlanta

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**[www.newamericanscampaign.org](http://www.newamericanscampaign.org)**

**[www.ilrc.org](http://www.ilrc.org)**