switchboard
connecting resettlement experts

Enhancing Access to Legal Services for ORR-Eligible Populations

Guidance for refugee service providers

For most resettled refugees, the next steps in their immigration process are explained during cultural orientation. But many newcomers may still feel overwhelmed or uncertain about the process. This guide is designed to support refugee service providers—including caseworkers, managers, and others who work closely with Office of Refugee Resettlement (ORR)-eligible individuals—in strengthening their everyday processes to help clients access immigration legal information and services. By using practical strategies that can be integrated into existing workflows, you can help your clients connect to legal resources without stepping outside your scope of work.

Introduction

This guide suggests six steps you can take in your work to help newcomer clients access appropriate legal resources when needed:

- Identify legal needs through routine work
- Protect client information/data protection
- Build strong referral pathways
- Support clients while setting boundaries
- Center consent and client choice
- Set and manage client expectations

Note: Throughout this guide, you'll follow the story of a newcomer named Ana to see how these practices work in real interactions. Her case offers practical examples of language, tone, and decision-making that reflect a trauma-informed, client-centered approach.

Meet Ana:

Ana is a 30-year-old mother of two who is eligible for services through the Office of Refugee Resettlement (ORR). She recently enrolled in a family support program for help with housing and getting her children enrolled in school. Ana is currently going through immigration court proceedings, but she does not have legal representation.

Identify Legal Needs in Routine Work

As a refugee service provider, your intake conversations, case management sessions, and follow-up meetings often touch on areas that closely relate to clients' immigration status, timelines, or concerns about rights and protections. Consider adding a question to your intake form that asks clients about their immigration needs. Incorporating a **brief and consistent check-in about immigration legal needs** into your service provision helps normalize the conversation and creates natural openings for clients to share information and for you to offer support.

Routinely checking in with all clients about any legal needs also **reduces stigma** and avoids placing pressure on individuals to raise concerns on their own. Some clients may not know that help exists, while others may hesitate to ask out of fear or past negative experiences. A **trauma-informed approach** recognizes that clients may have experienced uncertainty or harm related to systems of authority. Create space where clients feel safe, respected, and in control of what they share. This helps clients decide what support they want and when.

As you will see in the blue box below, you can introduce this as part of your regular process by saying that your organization asks all clients immigration-related questions to make sure they have access to support if they want it. Keeping the tone open and optional can help reduce pressure.

Ana's Intake Appointment:

During her intake appointment, Ana's case manager, Jesse, follows the organization's standard process: asking every client a question about immigration-related needs.

Jesse says, *"We ask all our clients if they have any immigration-related questions or needs, just so we can make sure you have access to support if you want it. You're welcome to share as much or as little as you feel comfortable."*

Ana hesitates, then shares that she has an upcoming immigration court date that she does not fully understand. She explains that she has not been able to find a lawyer and feels nervous about attending court alone.

Jesse listens attentively, thanks Ana for sharing, and reassures her that she does not have to make any decisions right away.

Reflection: This conversation happens naturally because Jesse asks the same, low-pressure questions at every intake. Without that routine, Ana may not have mentioned her court date, as fear and uncertainty often keep clients from raising concerns on their own. Jesse's response models a trauma-informed approach: she acknowledges Ana's concerns, doesn't pressure her for more information, and lets Ana decide how much to share.

Protect Client Information Through Thoughtful Documentation

How you collect, document, store, and share information is an important part of providing safe, trauma-informed services. A trauma-informed approach recognizes that sensitive details like those related to immigration status or legal history can put a client at risk if they are recorded carelessly or accessed by third parties.

Best practice when dealing with clients' personal information is to **document only what your program needs** for service delivery and required reporting. Avoid recording sensitive details that are not necessary. This includes clients' immigration status, legal history, or family members' information unless it is directly relevant to the services you are providing or required for your direct work.

Follow your organization's confidentiality and data protection policies for storing and sharing client records. This will likely involve using secure systems, limiting who can access sensitive information, and clearly explaining to clients how their data is processed. For more, see this guide on creating high-quality case management documentation.

Many clients may come from situations where sharing personal information carried real danger. Being transparent about how you'll handle their information and respecting what they choose to share or hold back helps build trust and supports their sense of safety.

Documenting Ana's Intake:

Before Ana leaves, Jesse says, *"I'll document only the information needed to support your case. I won't include sensitive information or your immigration history, unless it's necessary for services."*

After the meeting, Jesse documents only what is necessary and avoids recording detailed or sensitive immigration history that is not required for service delivery. Her notes are stored in a secure system with restricted access, in line with organizational policies.

Build Strong Referral Pathways

Connecting clients to the right legal service providers is one of the most impactful ways resettlement agencies and their partners can offer support. Effective referrals are grounded in strong relationships, accurate information, and respect for both clients and partner organizations.

The landscape of legal services can change quickly due to funding, staffing, or policy shifts. **Maintaining an up-to-date understanding of available services** requires tracking which organizations serve specific geographic areas, what languages they offer, and whether they are accepting new clients, as well as being familiar with any preferences these organizations have for accepting new clients, such as using online referral systems or directing clients to walk-in hours.

Service mapping is the process of identifying and maintaining current information about available services. It involves staying connected with partners, sharing updates internally across teams, and coordinating to avoid duplication. When referrals are well informed, they reduce client frustration and help build trust in the broader network of services.

When making a referral, **provide the client with a clear explanation about what they can expect**, such as:

- Whether services are free or low cost
- How they can contact the organization
- Whether there may be a wait before they are contacted or seen
- What documents they may need to provide

A respectful referral also **recognizes the time and capacity of partner organizations**. Incomplete or unnecessary referrals may strain relationships and can slow down access for clients who need urgent support.

Finding a Legal Service Provider for Ana:

Jesse checks her organization's current referral list and finds a legal service provider in Ana's preferred language that is currently accepting new clients who have immigration court cases.

Jesse shares the organization's contact information so that Ana can reach out to them directly.

Jesse goes over what Ana can expect, including eligibility considerations, whether services may be low cost or free, possible wait times, and what documents might be needed.

Jesse lets Ana know that she can also make the referral on Ana's behalf, if Ana prefers that and gives permission to share her information. *Note that this option would require that Ana sign a release of information (ROI) for Jesse to share Ana's information in the referral. (See section*

Support Clients While Setting Boundaries

Facilitating a successful referral that results in your client securing legal counsel is an ideal outcome. However, legal services capacity is often limited, and many clients may not be able to secure representation. When this occurs, **identify and connect clients to other available legal services, such as clinics and hotlines. Stay within your professional role, and do not provide legal advice**.

Legal clinics, which are typically offered in a group setting, and legal aid hotlines are good alternatives to individualized legal representation when resources are scarce. When mapping legal services in your area, speak to legal providers about these options to maximize possibilities for your clients to access information and advice on their immigration case.

If your client has not secured legal representation, you may find that they are directing their legal questions to you. However, **only licensed attorneys or accredited representatives are authorized to provide legal advice**. Immigration and legal decisions can have serious consequences, and providing inaccurate information or crossing the line into giving legal advice can lead to disastrous impacts for your clients. Moreover, **state laws prohibit the unauthorized practice of law**. Staying within your role protects both you and your client.

If you are unsure whether a conversation is moving outside the scope of your role, it is best to pause and remind the client that you are unable to answer legal questions. This approach aligns with the **Do No Harm** principle and helps maintain trust while ensuring clients are supported safely and responsibly.

Setting Boundaries with Ana:

As Ana struggles to secure legal counsel but faces an upcoming hearing, Jesse provides information about organizations that offer group legal clinics in the area.

When Ana asks what she should do before her hearing, **Jesse sets clear boundaries while remaining supportive:** *"I'm not a lawyer, so I can't give legal advice about your case, but I can help connect you with a trusted legal provider who is best equipped to guide you based on your specific situation."*

Jesse avoids offering legal advice and instead emphasizes that Ana should try to ask this question at the legal clinic, where a qualified legal representative can guide her based on the details of her case.

Center Consent and Client Choice

At the heart of trauma-informed practice is respect for client autonomy. This is especially important when sharing a client's information with someone outside your organization. **Before making a referral, obtain the client's clear and informed consent.** Clients should understand who will receive their information, what will be shared, and why. Have this conversation in a way that is accessible and free of pressure.

Some clients may prefer to contact a legal provider on their own rather than having you share their information. Others may welcome support in making that connection. Offering options allows clients to choose what feels most comfortable.

When sharing information, keep it limited to what is **necessary**, such as basic contact details and relevant information that can help the legal provider understand the urgency or nature of the case. Even then, be sure to check that the client is comfortable with each piece of information being shared. This reinforces trust and supports the client in remaining an active participant in their own process.

Obtaining Ana's Consent:

Jesse asks Ana how she would like to proceed, and Ana states that she would feel more comfortable if Jesse helped.

Jesse clearly explains what information would be shared, limited to basic contact details and the fact that Ana has an upcoming court date.

Jesse asks for Ana's consent or to sign a Release of Information (ROI) form. Ana agrees, and Jesse makes sure that only the necessary information is included.

Set and Manage Expectations

Clear and compassionate communication is a cornerstone of effective service delivery. **Simple explanations and thoughtful framing of topics** can go a long way in setting clients' expectations and supporting their understanding. For example:

- When asking about a client's legal needs, framing the question as a routine part of services can normalize it and reduce pressure.
- When explaining your role, clarifying what you can and cannot do can help prevent misunderstandings.

- When offering referrals, emphasizing that support is available can help reduce hesitation.

Respond honestly when you do not have an answer:

- Acknowledging uncertainty, while working to connect the client with someone who has the appropriate expertise, demonstrates integrity and care.
- Following up after a referral can further strengthen trust.
- Checking whether the client was contacted and offering to assist if the connection was not successful helps ensure that support does not fall through the cracks.

Setting Expectations with Ana:

Before closing the session, Jesse outlines next steps: *"They usually respond within about a week, but if you don't hear back, please let me know and I can help follow up. I'll also be sure to check in with you at our next meeting."*

Jesse is transparent about what to expect and what is uncertain, which helps build trust. At the next meeting, she follows up to confirm whether Ana was contacted and offers additional support if needed.

Sample Scripts

The following sample language can be adapted to fit your program's context and your clients' preferred languages.

Routine Legal Check-In (Intake or Case Management)

"As part of our services, we check in with everyone about immigration-related questions to make sure you have access to accurate information and support, if you want it."

"You don't have to answer now, but if legal or immigration questions come up at any point, I can help connect you to trusted partners and resources."

Explaining Your Role and Setting Boundaries

"I can share general information and help connect you with a qualified legal provider. For advice about your specific situation, it's really important that you speak with a licensed attorney or accredited representative so you get the most accurate guidance."

When You're Unsure

"That's a really important question, and I want to make sure you get the most accurate answer. I'm not able to advise on individual cases, but I can help connect you with someone who can."

Offering a Referral

"There's an organization that provides legal services in situations like yours. Their services are [free/low cost]. It may take some time for them to respond, but I can help you get connected. Would you prefer to contact them yourself, or would you like me to help make the introduction?"

Explaining What to Expect from Legal Providers

"When you reach out, they may ask for information about your legal situation and timeline. They'll review your case and let you know what options may be available. Sometimes there can be a wait, but they'll explain next steps as clearly as possible."

Obtaining Consent to Share Information

"Before I share any information, I want to check what you're comfortable with. I would only share [describe the specific information]. Is that okay with you? You can also choose to contact them directly instead."

Actions Steps for Implementation

The tips in this guide will have the most impact when implemented as a team-based, normalized practice, rather than an individual responsibility. Organizations that are most successful tend to:

- Integrate these practices into existing workflows rather than adding new tasks
- Provide ongoing training and reinforcement
- Help staff use consistent language so clients receive the same message regardless of whom they speak with
- Maintain shared, updated referral tools
- Build relationships with legal partners, ideally at the leadership and service-delivery levels
- Create space for staff to ask questions and build confidence

Conclusion

You can help your clients access important legal services by making small, consistent adjustments to the work you're already doing. By checking in routinely about their legal needs, protecting their sensitive information, building strong referral relationships, staying within your role, centering client consent, and setting clear expectations, you will meaningfully strengthen your clients' path to legal support—without giving yourself or your colleagues additional responsibilities or exceeding the scope of your position.

Resources

Creating High-Quality Case Management Documentation: This guide will teach you how to create different elements of a case file and use techniques to improve the quality and efficiency of case management documentation.

5 Tips for Strengthening Referral Networks: This tip sheet provides practical steps to help you strengthen your referral network so newcomers can access the supports they need.

Community Resource Mapping Template: These templates will support you in your community resource mapping process and can be modified to fit your local needs.

Challenging Community Conversations: Three Tips to Build Understanding and Support: This blog post offers practical tips for navigating community conversations about newcomers.

To learn more about Switchboard, visit SwitchboardTA.org.

The IRC received competitive funding through the U.S. Department of Health and Human Services, Administration for Children and Families, Grant #90RB0053. The project is 100% financed by federal funds. The contents of this document are solely the responsibility of the authors and do not necessarily represent the official views of the U.S. Department of Health and Human Services, Administration for Children and Families.