



Webinar: Remote Case Management with Newcomers: Strategies for Effective Virtual and Hybrid Service Delivery

September 9, 2026

Transcript

Introduction

Maya Wahrman, LSW (MW): Alright, welcome, everyone! Thank you so much for being here. I'm Maya Wahrman. I'm a licensed social worker in the state of New Jersey and a training officer here at Switchboard. Really excited to get into this topic with y'all today.

I was a case manager all throughout the beginning days of COVID and thinking about how to help transition clients very quickly and without any warning into a lot of remote case management, and then how to continue and choose what to keep of that, kind of beyond COVID. So really excited to be thinking about some of these things with you, and, joined here by a really wonderful expert, Kristen.

Kristen Allen (KA): Thanks, Maya. Hi, everyone. I'm Kristen Allen. I'm a training officer here at Switchboard, and I've spent about 15 years in refugee resettlement and immigrant integration. Prior to joining Switchboard, I led the virtual reception and placement program here at the IRC, helped to design and implement it. And I really hope that today you all can take away something to support your practice and the newcomers that you serve remotely. So, great to see you. Back to you, Maya.

MW: Thanks so much, Kristen, and very excited to learn from and share your expertise today. So, by the end of this session, we have a lot to do. You'll be able to first describe virtual and hybrid services and the importance of digital access and remote case management. Second, implement approaches to build trust and improve communication with newcomer clients in remote interactions.

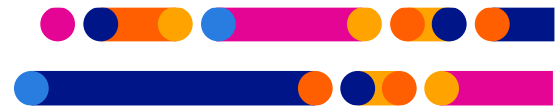
Third, you'll be able to apply key safety practices to protect clients' privacy, personal information, and well-being. And finally, you'll be able to evaluate the pros and cons of virtual platforms based on client needs and organizational resources. I see a hand raised.

We'll be addressing questions through the Q&A today, so please don't hesitate to use that Q&A so that we can address all of your questions and get to your different learning needs today. Before we really dive in, I just want to give a quick disclaimer. Any mentions of specific products in this webinar are for informational purposes only. Switchboard doesn't endorse any individual for-profit company or product.

I think the slides will catch up here in a moment, there we go. We will be mentioning specific products, because we're doing remote Case in the real world, and we want it to be concrete and to be talking about what you might be using. But we're not endorsing any specific company or app. We just want to provide information that's going to be helpful to you today.

Describe virtual and hybrid services and the importance of digital access in remote case management

MW: So let's dive right into our first objective, again, which is describing virtual and hybrid services and the importance of digital access and remote case management. So, if, you can get out your phone or have another browser open, we're gonna start with a Slido, and we'll be using Slido throughout today's presentation to, stay engaged. We'd just love to hear from you on a scale from 1 to 5.



How much do you currently engage in remote case management? Let's get a sense of who's in the room, what expertise we have with remote services. We acknowledge that it's a changing landscape. There's a lot of different emerging technologies happening. By the way, to join that Slido, you're going to scan that QR code, or put in slido.com in your browser and go to 2361364, that's the input code.

I see responses are starting to come in, and we're seeing a lot across the board. there's something in this webinar for all of you, so I'm really glad to have all different kinds of experience levels and expertises here. We recognize there are some fully virtual programs, as we're seeing a number, five stars here. Those virtual services are growing across the country. They're being added to refugee service provision.

As Kristen mentioned, she has experience in those fully virtual programs. Some of the folks here may be leading those efforts. Others of you might be new to digital work. I'm seeing, you know, 9% conduct all services in person, and you might feel uncomfortable with some of that growing digital aspect, and so we hope that we'll be able to kind of address all of those pieces here today.

Definitely seeing there's a... average in the middle that some folks are doing those hybrid services. So we're going to define what those different kinds of services are, and how they all fall under the remote Case Management umbrella. I'm going to move us on in the sake of time here, but do keep your phone available or that browser open, because we'll come back to Slido.

So, today's presentation is about remote case management. That includes within it fully virtual services, as we saw in that kind of 4 or 5 range in the Slido, and hybrid services. And so, we're going to define each so we're all on the same page here. First, defining virtual services.

Virtual and information services, also known as VIS, range from human-led virtual assistants, such as caseworkers who support clients via phone, email, text, or video call, to emerging tools like chatbots that respond to common questions. VIS also encompasses websites, social media, videos, and other self-guided information services designed to empower clients.

Today, we're really focusing on that human-led virtual assistants. So, there's a lot of talk about emerging tools and AI, generative AI. I encourage you, there is a webinar coming up next week at Switchboard about AI, so, you can kind of join that as a follow-up, or if that's really what you're interested in. Today, we're really looking at the humans who are doing the virtual assistants.

So, you know, supporting clients with... via phone, email, text, or video. So virtual services are that fully, virtual services. It's all happening digitally, you know, through a screen, through a phone, etc. This is different from hybrid services, which incorporate both in-person and virtual elements to engage newcomer clients.

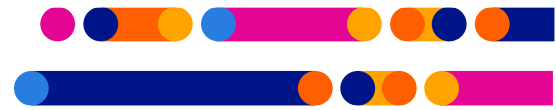
So hybrid programs often include specific protocols or guidance about which services are conducted in person or remotely. For example, home visits and periodic check-ins or intensive services, sensitive conversations, those are often prioritized in person in hybrid services. Whereas remote interactions might include routine or quick communication between a provider and a client.

Ways to fill out forms together, get quick confirmations or check in about information, or maybe fully virtual services like online training or virtual education that are part of a larger hybrid program. So again, both those fully virtual and these hybrid services are under today's umbrella of remote Case Management.

As we saw in the Slido, we have a wide range of folks doing different kinds of virtual and remote engagement. A lot of you are doing hybrid work. The, research done by the Switchboard Research Team, which my, which Kristen's gonna drop in the chat the link to this report. That, summarizes some of the, 2026 annual survey of refugee Service Providers, the ASRSP.

But it, it found that over 50% of over 500 refugee service providers, work in hybrid arrangements and at least deliver some, services virtually. Within that report, there were a lot of frequently cited benefits of remote services. Which, this was an open response question.

So, some of those include increased accessibility for clients who face any kind of barrier, you know, transportation, mobility, childcare, geographic barriers, or scheduling. It can be easier for clients to access



services. It creates greater flexibility in scheduling, communication, and service delivery. There is improved efficiency, timeliness, and responsiveness, in hybrid arrangements.

And it really expands reach to rural and geographically dispersed populations. There are challenges, of course, that come with, with hybrid or virtual work. Some of those frequently cited challenges included limited digital literacy from clients, so if they, don't have device access, if they don't know how to use devices or access the internet. You know, recurring technical barriers among clients.

That those can be some barriers. Another challenge is language barriers and limitations on interpretation in virtual context. We hope to address this a little bit today. Challenges building trust, rapport, and meaningful connection in virtual environments. That's a big focus of today's presentation.

And, another frequently cited challenge is increased staff workload related to troubleshooting technology and coordinating remotely. So we do want to recognize there are some challenges. And we're gonna try to think about how to mitigate some of those today to provide quality services.

We want to contextualize remote Case Management within, the different programs that we're in, and Office of Refugee Resettlement, or ORR, policy. So there was a policy letter in 2021 on virtual refugee service delivery. And it's worth, quoting here for a moment so that we're all on the same page, and Kristen's also put that link in the chat to the original policy letter.

ORR seeks to improve client access and to enhance the services offered to clients Through allowing a variety of complementary modes of delivery. Such as in-person instruction, online resources, online education, and virtual contacts.

However, ORR recognizes that ORR-eligible populations benefit significantly from interacting in person with service providers and other refugees, rather than solely online and in potential isolation. Therefore, ORR encourages states to only use virtual services when it's in the best interest of ORR-eligible populations.

So, what that means is we're not... they're not saying virtual services for everyone in every case, really keeping the populations that we're serving their best interests in mind. you know, ORR is aware that fully virtual services can be really helpful reaching clients who wouldn't have any support if there weren't virtual services available, maybe because of geographical distance from different offices, or the availability of local programming and supports.

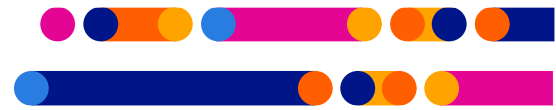
But also, when in-person connections and supports are available, it's important to try to connect to them and still utilize them. And that goes for using hybrid services meaningfully. When can we use those remote connections to bridge between meetings, to not make a client come into an office when that's really burdensome, when it's difficult to travel?

But not necessarily migrating to only virtual services if you are able to support local social connections, resilience of newcomers in person. So we want you to think about how you're engaging with each of these services, the advantages you're giving to clients who might not be able to reach the office. or might not be able to access non-virtual options.

But also what in-person supplements might be available if you are in a fully virtual program. That you can provide to clients so that they get some of that in-person connection, and really keeping the client's, best interest and welfare in mind. So, this teaches us how newcomers are gonna access our remote services, technically.

Digital access is the ability of individuals to connect to and effectively use the internet and digital technologies. So it's not just having, like, basic access or exposure to technology. Really, digital access means that every individual and community has the information technology capacity needed for full participation in society, democracy, and the economy.

We'll be dropping a couple of links in the chat to more Switchboard info about digital access, because we're only going to touch on it briefly today, but this is an important component to making any remote or virtual services Accessible and successful. So there are 5 core areas in digital access. The first three, again, we're going to drop a few links because these aren't the focus of today.



We'll go over them briefly. The last two are kind of more of a focus of today's presentation. So the first is connectivity. So, making sure newcomers have affordable, robust internet and broadband. Can they get on the internet? What kind of bandwidth do they need? How fast does their internet need to be? Are there assistance programs that exist? The honor roll is in the chat. Thank you, Kristen. The FCC Lifeline.

So there's a lot of different ways to help newcomers get on the internet, which is, of course, the first step to actually, engaging virtually. The second, is devices. So, same with the internet, you need how you're actually going to get there. What is affordable technology that's appropriate to newcomers' specific needs?

So is a smartphone enough for a newcomer to access certain things or just use basic communication? Do they need a computer? How intense or specialized or powerful a computer? Can you look at refurbished devices?

Which is something I've used also in my professional and personal life. Are there other low-cost programs?

Again, some of those links in the chat, help you answer or think about more of the resources with those questions. The third area is digital literacy, so training on how to use and access technology. What digital skills are your clients coming with? What do they want to build? How can you pair with their goals to improve their digital literacy and provide many different kinds of training?

And we have a lot of resources at Switchboard about that, so gonna pop those in the chat. Number 4 is about support and socialization. So there's the technical troubleshooting and learning about, you know, digital access, but there's also supporting social connections when possible, and this'll be a lot of our Section 2 about building relationships virtually. And finally, there's security, safety, and accuracy.

Security, client safety and security is always important, but we need... have special considerations when it comes to online engagement. How, do we protect clients from misinformation, from having their information stolen, from scams, and from other dangers that if we're engaging with them only virtually? And this'll be our main focus in Section 3. Why is newcomer digital access important?

Why is it a big part of remote case management? There are a lot of benefits for newcomers. Increased access to remote services, improved communication and coordination with providers. Improved outcomes and self-sufficiency. So, being able to engage more easily with less barriers with our service providers can improve those outcomes. And, you know, lead us to our goal of ultimate client self-sufficiency.

And beyond our programs, they create meaningful participation in our increasingly digital society. It's becoming harder and harder to not engage in some digital access or remote, you know, engagement with the world today. So we're also kind of setting up our newcomers for success Even after our programs. Newcomer digital access is also, beneficial for service providers.

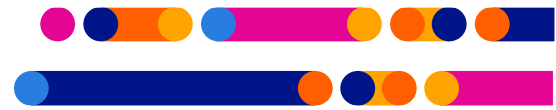
It creates improved client engagement and collaboration, expanded service reach and strengthened service continuity. It can mean less time spent training clients or facilitating routine tasks, which can increase service efficiency, it can optimize staff time and resources, and it might create less burnout due to increased client independence or more flexibility Where... where and how we can provide these services.

So this is why digital access is so important. However, I really want to emphasize, that Digital access is not the only factor of success in remote services. Providers are key to high service quality in remote services with newcomers. So this presentation today is really about improving that provider service.

Less about the digital access, which we recognize is important, and we're providing resources on that, but how can we make sure that providers are giving the best services they can, even when remotely? So, going back to that research product, that Kristen popped in the chat. There... it was found that clients perceived virtual care positively. When providers fostered trust, emotional support, and dignity.

Even in those virtual platforms, and when services were culturally and linguistically responsive. So, these are two things that are still really important in remote services, and we're going to touch on both of them today. So, a quote from this research product is that service quality in virtual environments is shaped primarily by provider practice rather than by technology alone.

So, knowing how to use the technology. Getting technology that works, optimizing that. We'll maybe talk about that a little bit at the end in Section 4, and thinking about how we select our platforms. But, the provider



practice that's the person who's behind these platforms, who is showing up, who's building relationships with clients, they are equally, if not more, important.

What that means on the next slide is whether you're in virtual or hybrid services, you're always going to want to approach any remote interaction with intentionality. You know, this webinar is for you, whether you're doing fully virtual or hybrid services, or you're just learning about what it might be like to do hybrid services.

It takes the same kind of intentionality, care, and attention to rapport building and communication to have good, effective case management interactions that are remote. So, I'm gonna introduce our first case scenario here. To review what we've discussed so far. So, meet the Khaled family. They have 2 parents, Ahmad and Samira, and 3 children. Mohammad, who is 10, Hasan, who is 6, and Layla, who is 1.

They recently arrived from Iraq as special immigrant visa holders. Ahmad is fluent in English, but Samira and the children have almost no prior English exposure. Ahmad is the only family member who's ever used a computer. Both parents arrived with very basic smartphones, but without phone plans. The Khaled family lives far away from your office, so you can't conduct many home visits or in-person meetings.

Your program allows for hybrid service delivery. So we'd love to hear from you on Slido. What actions can you take to support the Khaled family through remote Case Management Services? You'll just enter those responses, they'll come up anonymously on the screen, and we'll review them together.

I'm just looking in the Q&A that absolutely, if clients can't read and write, whether or not it's remotely, that can be really challenging within remote case management, so thank you for that addition. seeing on the screen, digital literacy, English referrals, being culturally responsive, calling in an interpreter.

Virtual check-in, making sure they have Wi-Fi, working with the family to help train them in digital literacy. and digital access, so really, how can they access services, you know, well, how can they get the right training? Can you offer transportation services to meet them in person on occasion, or what local, you know, services might be available to support them?

Help them download a virtual translation app, assisting with getting them a phone plan or providing a smartphone. how to use digital technology, because a lot of the information is one click away. Helping them with pre-employment training and finding a job, and what's available online versus what will they have to kind of navigate transportation to go find in person. Yes, love the plug for the Settle In app.

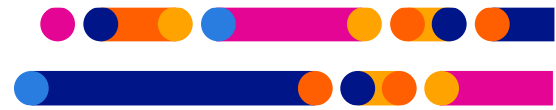
That is a great, opportunity to connect with online resources in their language. And using an interpreter to walk through those initial digital connections? Absolutely. Yeah, so where can you provide transportation in that, you know, so they can connect to things in person, and where can you connect them with online classes, with ways that you can talk through translation apps or WhatsApp?

Making sure that you work with both the adults, so not just kind of the low-hanging fruit of the adult who knows how to use a computer. That's something that we see sometimes. Oh, well, this person, I can just talk to him, because he already knows.

It's really important to invest in that training for all adults and children where that's applicable to your program, so that you can really serve the whole family and not... Not have someone not receive services just because they don't have the training to get the digital literacy to get online. Yeah, you can help with school orientation and registration online.

We also have some 360 videos here at Switchboard on different kinds of community orientation. What's it like to get on a school bus or go to the pharmacy? There are different ways that you can provide some of that orientation online. You can help with benefits applications online, absolutely. Thank you so much for all these. I want you to keep them in mind as we dive in, but I'm gonna, hand it over to Kristen for our next section.

Implement approaches to build trust and improve communication with newcomer clients in remote interactions



KA: Thanks, Maya! Alright, as we head into Section 2, we're going to talk about approaches that you can implement to help build trust and improve communication with the newcomers that you're supporting through your remote interactions. So, I really love seeing all of the examples that you all used, in Slido, because it really shows that you are able to reach clients with a lot of different services in remote settings.

So, let's go ahead and advance the slide, please. So first up, building positive professional relationships with clients through virtual communication requires, really, the same sort of soft skills that you use for your in-person case management. So those are the things like warmth, empathy, and approachability.

And these traits help build a sense of safety that clients need in order to disclose sensitive details and collaborate with you as you work together on their goals. So, in addition to relationship building, you want to make sure that clients understand basic information, like how to contact you, how to contact emergency services, that they know their phone number, and phone numbers for other key contacts.

They know how to ask for interpretation when they need it. You want to make sure that all adults understand how to call 911, ask for an interpreter, and say their address in English. So, let's discuss 3 approaches to build trust and communicate effectively in remote settings.

These tips go into the support and socialization that Maya was talking about in Section 1, that challenge of digital access, really wanting to make sure that we're meeting our clients' social-emotional needs as well. So how do we create support and social connection in virtual settings? The first is by building warmth. So, one way you can build trust virtually is practicing warmth in all of your interactions.

So, thinking about how we do that, introducing yourself, right? The client doesn't know you, they may never have met you or will have the opportunity to meet you in person. Remember your client's name and the correct pronunciation.

Smiling helps to create warmth and convey it, so when you're talking to someone, it can be helpful to smile, show that you're glad to be interacting with them, and that you're looking to support that individual. Another way is by asking questions, so starting interactions with the same pleasantries you might use when you're supporting someone in person.

So things like, how are you today, or how was your first day of work? can really help individuals see you as trustworthy and caring. You don't want to rush into business, like explaining an ESL lesson without first making time for some relationship building.

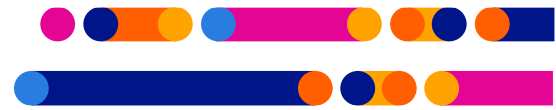
This can help clients decide to later share important information with you that they might otherwise keep to themselves, because you're really intentionally building that relationship. And you can do that by referencing previous conversations, so maybe, you know, I remember you said you're starting English class, how is that going?

The next is clarity, and the importance of clarity in virtual services cannot be understated. If reading or listening, reading your writing or listening to the information you're sharing. It's the only way that your client will receive services. It's really important that you communicate clearly, with clarity. So let's review some ways to do that. First, communicate in plain language.

Sometimes we use vocabulary or terms that are really specific to our settlement context, our job functions. But our clients don't have awareness for these terms. So, I'm gonna use an example. Let's say that you're working with a client, and they just found work, and so you, you know, are talking to the client on the phone to do a check-in.

You say, now that you've secured your first employment, we need to report the change in income to DCF. Now, the client may not understand all of that. But if I say instead, now that you've started your job, we need to tell the Department of Children and Families about it, because they provide your food stamps, and the amount may change.

Do you see how that second message removes the acronym, it simplifies talking about the reporting, the change in income, I know using the plain language in the second message really helped to make it clearer.



Short sentences also support clarity. Sometimes adding in too much a detail makes the message harder to understand.

So you want to focus on essential elements of what you want to say and adjust your communication style. And this is really something you can use in person as well. So be specific and provide relevant details whenever you can. Another thing to do to help, build clarity is checking for understanding. That's really crucial.

So, you may think that you've shared something with a client, but their understanding may be different based on their own knowledge and perspective. So, to check for understanding in a client-centered way, you could ask, what questions do you have? For me. That's gonna be different from saying something like, do you understand? Because it allows space for the client's own understanding in a positive way.

Another method to think about using is called Teach Back, and this is where you have the client repeat back to you, what they learned. For example, you could say, I want to make sure I presented the information well. Can you tell me back the steps you think we're going to do to make sure we're in agreement? You know, this is... you can also modify this to be reflecting back to what you've heard clients say.

So, saying something like, let me make sure I understood everything so I can best support you. I think we're going to do X, Y, and Z. Did I get that right? And this shows clients that you're listening and can take information, to... that they share in order to support their integration. Summarizing key points from the meeting is another great step to take to build clarity in your virtual interactions.

Next is consistency. You always want to check who else is present in the room or on a call, and that's really important for safety reasons that we'll get into Later. But just remember, whenever you're starting that call, you know, is anyone else in the room with you today, or is there anyone else joining us on this call?

Next is, Reminding clients about rules around privacy, you know, you are going to keep information private unless it's something, some sort of disclosure that you're required to, contact someone about. You want to maintain regular communication, so maybe that's having a scheduled check-in, maybe, you know, you have some sort of predictable routine.

You can say, every, you know, Wednesday, we'll have a check-in by phone, and I'll make sure if you have any questions, I can answer them at that time. Use consistent communication methods, because that also helps clients understand, what's coming next, what to expect from you. And whenever possible, try and use the client's preferred communication channel.

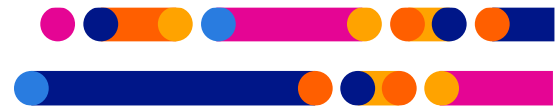
Think about using things like appointment reminders, you know, or follow-up messages, so clients are familiar. Like, I know that, the day before my appointment, I'm gonna get a reminder from my caseworker, or after the appointment, I know they're gonna send me a text message to recap what we've talked about. You also want to be dependable.

This is something we want, no matter what type of service you're delivering, that it's really important to be on time for appointments. Notify clients as soon as possible if you need to reschedule, and really respect those meeting times and deadlines that you set in the virtual setting.

Another thing is to ask your client. how they feel about the virtual interactions, and if they have ideas for how, communication can improve. So I use that example of, like, a text message. Maybe a text message reminder of what was discussed in the call really helps to summarize the call, it helps the client to know you and the client are in agreement of what needs to happen next.

So, these three approaches are really going to help build trust and make communication effective in remote settings. So, let's start to talk about, how we're choosing to meet remotely. There are really a lot of options in communication technology, so we're going to talk about some of the most common ones seen in remote case management. Out of these choices, it's good to ask clients again.

How do they prefer to communicate and try to honor that preference? Video calls such as Zoom or WhatsApp video are generally a really good, kind of gold standard for technology that allows relationship building through visual cues. It's going to help reduce social isolation by providing more of a tangible human connection.



And it can also give us better cues about someone's situation because we have that visual, and we're going to talk more about that in Section 3. However, some interactions are going to be better suited for text message, so just a quick question and response, nothing with sensitive information, or phone calls. Again, the client, this might be a good option for them if they're not able to turn on their video.

Clients may prefer one mode of communication, but if possible, we really recommend, you know, to honor that. However, we always think it's a good idea that you have at least one video session early on in the case management relationship, so it can help establish a strong, relationship with your client, and it allows for them to see you, for you to see their environment, and kind of start to build the relationship there.

On the other hand, some providers have shared that Clients may be more open to discussing difficult, like, mental health topics if they don't have to have their video on. So there's, you know, pros and cons. Maybe by not having video on, someone, you know, feels more comfortable sharing. It creates that kind of felt safety and reduces barriers to certain kinds of services.

So, here are some tips for your remote, interactions. So, some of these are just basic standards, so avoid eating in front of a client and maintain standard, decorum. So, you know, again, that goes back to timeliness. Next is planning for technical difficulties. In discussing a plan for what you will do if the original communication method fails.

You'll want to, you know, let the client know, just in case this happens, here's the, what I, you know, we'll try and call you back, something like that, so that helps to build trust. and the technology as well. You want to consider what type of signature is needed on paperwork.

You know, if you are distributing money as part of your virtual program, you may want to come up with a way where someone's able to submit a document they've signed for some things. It's also possible to take verbal consent, and verbal consent is where the staff reads aloud the document to the client in the meeting, and then asks for their consent And you record that consent in the case notes.

So, in this example that I'm gonna show, if you go ahead and advance one, please. We'll see here that says, staff received client's verbal agreement that they understood and consented to the service plan. So you've finished the service plan, you've got that verbal consent, and you've recorded it in the case notes. Alright, so let's discuss how you can plan for success in, your remote services.

So, first we'll talk about interpretation, and just like all interactions, we have to begin with quality, appropriate language interpretation. Some programs allow for Friends or family members to provide interpretation, but using independent, trained interpreters is really a best practice.

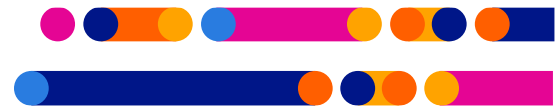
We want to make sure clients have quality interpretation provided by you for free, either in, like, a conference call with interpreting staff, or maybe use a phone service like the Language Line. Interpretation source should match the complexity and privacy needs. of the content that's going to be discussed. So, consider how you need to accommodate interpretation in remote interactions to make things go smoothly.

And we have a few different resources that Maya will pop in the chat that talk about how you can best work with interpreters. Remote services, are sometimes available at short notice. People just call, and you take the call, and kind of, you know, you have a conversation, you need interpretation. So, you know, being able to call up on someone to provide that interpretation is really great.

Remote interpretation also makes, like, services possible for less commonly spoken languages, where maybe you don't have access to a local interpreter. For timely and cost-effective services. An organization can always sign a contract or buy a subscription, with a remote interpretation service, so that's another thing to think about. Phone interpretation is usually easier to get.

While video interpretation provides better engagement, and is, of course, essential for things like sign language interpreting. So, when we think about, kind of, the different types of interpretation, you know, maybe the interpreter, you're relaying some information, then they're speaking.

That's considered, consecutive interpretation, simultaneous is where you're sharing, and then the interpreter is also sharing at the same time, so something, that's a very specialized service, so it may not be available, So,



next we can talk about some of the expectations that clients need to have in the remote services. You're not available to clients at all times.

You know, even if you're only a phone call away because you're delivering remote services, doesn't mean that clients should be able to expect to hear from you. Whenever they, you know, send a text message or send, you know, an email, whenever they make a phone call.

So it's really important that you help clients understand how frequently they can expect to hear from you, and, your timelines for returning phone calls or text messages. Help them understand. like, they can reach out to you if they have questions, and some of the best methods to be able to reach you, so if you have a quick question, feel free to send me a text.

I promise I'll be able to respond by the end of the next day. So, when we're talking about these remote services, it's also really important that we keep in mind that clients have a responsibility to communicate in a timely manner as well, especially if there's changes to things like their income, their housing, their family status, just other important updates.

So you want to highlight that to clients, that your service provision and their eligibility for the program really hinges on timely and accurate information. And finally, we can talk about answering questions. So, clients may not understand why they have a virtual relationship, or why you're not meeting with them in person if, you know, you have an office just down the street.

You know, why aren't you coming to their house, for every interaction? So it's really important that you take time to establish why this program, or this Component of our program is virtual, and when they can expect to hear from you. So let's talk about, remote interpretation a little bit more and address some of the, like, common challenges and how we can, reduce those challenges.

So, technical issues, I think that we've all learned by now, technology will sometimes be unreliable. Sometimes, you know, a call will drop or the video doesn't work. So it's always important, that you give clients an idea of, like, the backup plan, for what you'll use in case the technology fails.

Another thing to think about is for you to maybe, if you have the backup, say, you know, if for some reason our video call fails, I'm gonna call you at this phone number. I'm going to, you know, try and reach out again. You'll also want to let your interpreter know what will happen if you do get disconnected. Interpreter fatigue is real, so remote interpreting is probably even more taxing.

Because there's that, like, audio limitation, there are reduced visual cues, so you'll want to make sure, as you're working with your interpreter. that you're scheduling regular breaks to help the interpreter, you know, maintain accuracy and quality of the information they're relaying. There can be confusion and miscommunication when we're, you know, working in remote settings.

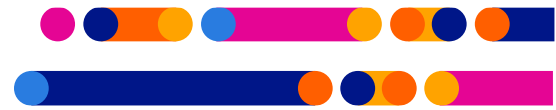
So, having a clear, intentional communication in plain language is really important. You could hold A, like, pre-session with the interpreter to kind of review what's going to happen, what will be discussed, how you would like to take turns, and how interruptions or requests for clarification can be handled.

You also want to check throughout the session that, you're using those open-ended questions, you know, that you're asking, Can you repeat back to me what you think the next steps are, or can I repeat to you what I think was shared? That teach-back method could also be really helpful, and you can... kind of think about all of these things and your interpretation practices remotely.

So I'm going to turn it back over to Maya to talk about how this can work in practice with another case scenario.

MW: Thanks, so I'll be, pasting this into the chat as well, but I'd like you to consider Marie and Agustin. They are clients from Haiti. Marie had Augustin when she was a teenager in Port-au-Prince, and he's now 16 years old. They've lived in the U.S. for a while, but they recently found out through their church that they are eligible for fully virtual support services through your agency.

Agustin speaks English well from school, and he knows how to use a computer. Marie only speaks Haitian Creole, and she struggles to navigate her own smartphone. When you call her to try and set up a video call, she



expresses discomfort and confusion on how to open the app and how to meet with you. She says she's not even sure that they need any support services.

So, keeping them in mind on Slido, would love to hear from you. What support could you provide to help Marie access and use available virtual services? What support can you provide? We're a fully virtual program to support Marie. Give me a couple moments here.

Offering reassurance, yeah, what Kristen talked about, taking time to answer those questions, talk about the concerns. reiterating what services you're offering, if she's unsure she meets the criteria, going through criteria with her and showing how it aligns. Maybe starting with that simple phone call, if that's easier for her, absolutely.

Offering digital literacy classes, validating discomfort, breaking down the steps to access tech. In a fully virtual program, you might not be able to do that in-person visit, but if that is available to you in a hybrid program, that's a great idea. Establish some of that relationship in person, if possible. YouTube videos and Haitian Creole, and how to set up and use apps.

Settle In, again, is a great option that has Haitian Creole in it. Making sure that you have appropriate interpretation, communicating with her what the concerns are and what services might be available, explaining all the different ways that you might be able to support virtually, and then sending instructions on how to use that technology.

Have... using an interpreter to help with the digital literacy piece, in her own language, absolutely. you're providing flyers for future access, and just explaining again about the services you offer. I also want to mention one point here.

Someone said you could start with a simple phone call, and as Kristen said, even though we think of, you know, those video calls being the gold standard, and you can explain to clients why it can be helpful to build relationships. You know, with video communication.

Some clients really are able to open up more, or Start the small steps, in my graduate work as, as a social worker, I was doing telehealth, and I worked with a couple of teenagers who really, felt more comfortable talking to me because there wasn't a video component. So, you want to respect that. I'm seeing really important here not to parentify the child.

So, Agustin is not the interpreter, and he is not responsible for teaching Marie all of her digital skills. So we can, see how we can support mom or other ideas he has, but it's not his responsibility. He is not the social worker or the teacher. So I think that's really important. So let's move on to our next question.

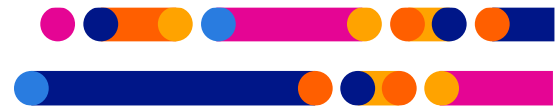
When providing hybrid services, what should you keep in mind to meet the needs of all family members? So you can think about Marie and Agustin here, you can also recall the Khaled family we talked about earlier. You know, what are the ways that we can meet all the needs of all the family members who have different literacy levels and digital literacy levels when we're thinking about providing hybrid and remote case management services? So making, you know, services accessible for everyone, and what does that look like for different family members?

We saw that with Marie and Augustin, that he's going to be able to access, you know, some of those digital services with more ease, and you want to give time and space for Marie to learn that, so that she can feel comfortable accessing services as well. I see a few more responses are being typed in, so hopefully those will appear in a moment. Great to hear you all thinking.

Building rapport with each individual client, working with clients individually and not just as a unit when possible. Gathering information, that's part of your assessment phase in case management, right? What are everyone's abilities? Comfort with language, with technology? Ensuring everyone is present and understanding the conversation when virtual conversations take place, absolutely.

So, if everyone's in the room, they can all understand what's going on, they can all access that conversation.

Yeah, having a self-sufficiency plan for each member that goes for virtual or in-person, or anything in between, right? Having regular contact, whether that's virtual or in person.



You know, discussing the comfort level and literacy level individually, and you can learn who responds better to what kinds of conversations or services. So really doing that client-centered work of working with each client to figure out what's the best way to communicate with them and to reach them, even in a virtual program. a fully virtual program.

Being mindful of needs, not making promises. checking in with non-English speakers to ensure they're safe and well-informed. Absolutely, these are great ideas. So appreciate all of this. I'm gonna pass it to Kristen to talk, to take us into safety.

Apply key safety practices to protect clients' privacy, personal information, and well-being

KA: Alright, thank you. So, as Maya said, we're gonna start talking about how we can apply key safety practices to protect our clients' privacy, personal information, and well-being.

So, I'm gonna, point out on the screen, once it advances, there's an important reminder that securing client safety and well-being in remote settings is a crucial commitment. that we have is case managers and service providers working with vulnerable populations.

So, Maya's gonna pop in, one of the resources that we have on, creating safety and security in virtual settings, and we recommend that you review this. after today's presentation, if you haven't had a chance to review it yet. So, let's first talk about what happens if we don't apply safety practices in remote settings.

Alright, so first, we're going to put our client data and personally identifiable information, or PII, at risk of theft or exploitation. Your organization likely has PII, policies, and The Office of Refugee Resettlement has guidance on protecting PII and allowable data sharing. If we don't apply these safety practices, we break confidentiality and professional ethics when serving vulnerable populations.

And third, we damage a client's trust in safety and case management services. So this is why we're spending a whole section on, safety and security. So, what can we do to maintain privacy in remote settings now that we know why it's so important? If you're meeting with a client remotely, we want you to think about the same standards of confidentiality that you use in your in-person work.

So I mentioned before, you start a conversation by asking the client if they're in a physical space where they feel they have the necessary privacy to share their sensitive and personal information that also relates to you. So, if you're working from home, which is, you know, a great perk that some of us have.

But you should not be meeting with a client virtually if you have a family member or a roommate who is also home and in the same room with you, or otherwise in a place where they can hear that conversation. So just be really mindful that you need to know about your space and, the client's space. You also want to make sure your online systems are secure and can be accessed from your home without compromise.

So, if you are working on your laptop, you know, locking the screen before you step away, that could be just a simple step to take. Be sure that you inform your clients about the limitations to confidentiality. There are times, such as disclosures of child abuse, where we can't keep our clients' information private.

So, it's important for clients to be aware of that in advance, so if there's ever an emergency that arises, it's not going to be a surprise, and it won't feel like a breach of trust when you have to share that information.

Finally, when you are, working remotely, you want to ensure that your internet security measures are in place, that you are being HIPAA compliant when possible, so this could mean that you never work from, like, public Wi-Fi, or you're... maybe need to use password-protected transmission of information when you're doing some sharing. So, let's dive deeper into protecting personal and sensitive information.

So first, we want you to always use a release of information when discussing a client with someone outside of your organization, or making referrals to community partners if you're going to send client information, you know, you're looking for a referral to an external resource. Make sure that the client... signs the release of information. You may see it abbreviated as ROI sometime.



Make sure they sign that before you give out any information. This document should be available at your organization, and it's gonna show proof. That the client gave you permission to share this specific information. On that same note, you want to make sure that you're using encrypted emails or secure servers whenever you're sharing identifying details about your clients outside of your agency.

So this will help prevent your client's information from ever getting stolen on the internet. You know, it's just really important that we are protecting our clients' confidentiality when it comes to electronic record sharing. It's very easy to email a file, but it doesn't mean that, you know, it should happen. It really is everyone's responsibility to make sure that they are, you know, protecting confidentiality.

So that's going to include the support staff at your organization, people who maybe aren't in direct services, that are working the front desk, maybe you're monitoring and evaluation. Team, you know, making sure that all of that information is, kept us private. So, looking, back at, what was just advanced on the slide, thank you, Vincent.

So, we've talked about the sharing through encrypted, or safe systems for both clients and providers. That's another thing. Make sure clients know that they shouldn't just be, you know, I'm gonna text you my social security card, because that's not a safe transmission, right?

So it's important that you're thinking about how clients are sharing information with you that you need to receive, and then also how you're transmitting it. You know, back to clients or to community partners. We recommend that you're never storing, personal information on personal devices. So if you have PII for clients, don't store it on your, you know, home computer, because it was easy to do case notes one night.

We just also, think it's really important that as technology changes, and we see more about AI and, you know, all these great things that can come through for our productivity or supports to share information that we really want to be mindful of what's being shared on the personal device.

And, this can even be things like when you're using, like, Siri, or OK Google, doing, speech-to-text dictation, you know, documentation, from clients, things like photographs that they're sharing. you know, people sometimes want to send those through WhatsApp. You really need to think about, like, what agency policies that you have. For receiving information and what safeguards are in place.

And then think also if you have some sort of AI tool that has access to the information. A lot of people are using AI for work reduction and support. But, make sure that there's some sort of private license that protects the information, so it's not being used to, you know, train the next new model, and you never want to share any client PII with any external AI platform.

So, moving forward, we're going to talk about, some of the resources that we have for clients. so they understand digital safety. So I think Maya's gonna pop a couple things in the chat. We'll have some resources, from Switchboard as well as SettleN, which is really client-facing. So you can start to have these conversations with your clients.

So some of the things that are helpful to teach clients about and help them understand so they can stay safe online are educating clients about red flags. So this can include misspelled URLs. telephone requests for PII or social security numbers. Urgent or threatening language, generic greetings.

We really want to make sure that we are helping clients understand when it's safe to share personal information, and when it's okay to use payment information during virtual interactions. The next is teaching clients about scams.

I think all of us have seen some of the things that people try in order to, you know, solicit information, so showing clients things like phishing emails, fake websites, a, you know, a scam call script, really helps clients understand what they should be mindful of. You can also explain that the government is never going to ask for online payments, and they're never going to ask for your information.

They're only going to communicate with you by mail. So if someone is calling saying, I'm from the government, you have to spend, you know, this much money in order to resolve this issue, we want clients to know early on that that's not true. We still see, you know, scams going around and impacting people that we're working with.



So, next, when we're talking about, when clients are going to receive services virtually, there's these threats that typically aren't, happening in in-person environments, so it's really important that we try to mitigate those risks. So one of those things is someone impersonating a service provider to collect sensitive information. We want to teach clients to never share personal information unless they've confirmed the identity of the caller, which can be challenging, right? We're in this remote setting, I can't, like, it's always my same face talking to you.

So one thing that we have, suggested is that people use some sort of, alphanumeric code, so they're able to know... the client knows that code, they ask whoever's calling for that code, and that's how they verify they really are a provider for that client. And clients should know they only continue interacting with someone if they have that code.

Just want to point out, it should never be something that's the client's PII, so we don't want to use, like, the alien number, because we don't want to be sharing that around with people that would be serving The client. So finally, as a kind of segue into the second half of this section, which is focused on client well-being and safety, I think it's really important to help parents and families learn how virtual environments can harm children and youth in particular. You want to offer online, safety information, child safety online tips, information about cyberbullying. Tell parents the risk of online sexual abuse.

And if you're on here and you work with children, you may want to add some of these elements of digital citizenship into your lesson plans. I'm gonna pass it over to Maya for our next Slido.

MW: Thanks, and I'm gonna be really brief here, so that we have time for all of our great content. But if just a few folks wanna, put in on Slido, what's one practice you might adopt to further protect clients' privacy and personal information?

So we'll do this kind of rapid fire if anyone wants to put this in on Slido based on, Kristen's presentation, but we'll only spend about a minute here, so that we can get through all of our important content for today. Seeing a couple of folks typing. the alphanumeric passwords or code word.

Yeah, that was newer to me, so I was glad to learn about that as well. when I was a kid, we were taught to have a buddy word if someone had to come pick you up from school. I think it's kind of the same idea, but in a digital context. Using encryption, including PII protection awareness and cultural orientation. That's a great one.

So it's our responsibility to protect PII, but also teaching clients how to protect their own PII and why that's important. having that secure internet connection, tools that have end-to-end encryption, maybe using HIPAA as a way to say, is this platform secure for the conversations we need to have? Having scripts to teach about scamming. Yeah, these are some great ones.

Seeing a lot about securing our connections, avoiding public Wi-Fi when accessing or discussing clients' personal information. I think that one's really important. We don't want to use those insecure or unknown Wi-Fi networks when we're accessing PII. If you want to work from a coffee shop, just don't be accessing, you know, PII at that time. And absolutely avoiding your personal phone for PII.

And having your private designated space, the physical space, yeah, these are great. Alright, I'm gonna pass it back to you, Kristen, so you can keep going. Thank you all.

KA: Thanks, Maya. Those are some great responses. I can tell people are really thinking about how to put this into practice. So we're gonna move into some elements of nonverbal communication. I've kind of called this out a few times, this importance of a video call.

It was a rule that we had in VR&P that you had to have at least one video call early on, and so these are some of the, like, things to think about, so you can assess client well-being. With those visuals, those nonverbal communications. So first are cultural differences.

Things like direct eye contact, head nodding, those can vary across cultures, so when working with a client, you want to consider their unique culture when assessing nonverbal communication. Next are contextual differences. So these are variations in communication across age, sex, social status. And they impact how the client may choose to communicate with you.



Noticing changes, is another way you can kind of assess client well-being. So, if there are significant changes to a client's verbal or nonverbal communication, it may indicate a reason for concern, so if someone is normally really outgoing and engaged and has a lot of eye contact.

And they show up on a call, and they're really low energy, and they're not making eye contact, or really speaking that much. that could be a reason for concern. So you may use this information as a way to kind of follow up and, you know, determine if this is something that you need to look further into. you know, what the reason behind the change is.

Finally, it's really important you think about all of the elements of nonverbal communication in a holistic way.

We have to take all of the nonverbal communication as a whole in order to better understand a client's situation. So we're going to now move into different elements of nonverbal communication. Maya's gonna drop in a helpful resource on nonverbal communication for you to be able to refer back to.

So, again, having video calls with clients, even if they're only occasional, really can help you unlock more insight into how clients are doing, because there are these visual cues that you can consider in your assessment. So first is this facial expression. You can tell how someone's doing based off their facial expression, so, you know, are they smiling? Are they frowning? Do they have kind of a neutral face?

The second is Para verbals, and this is really about the tone and volume at which something is said, and not the information they are sharing. So, you know, a client who's worried that someone may overhear them may be whispering, whereas someone's really frustrated and maybe they're yelling. Next would be this body language and posture to take into consideration.

It can kind of sometimes tell us how someone is feeling or how receptive they may be to conversation. So, you know, crossed arms, maybe someone is frustrated and withdrawn. You can start to kind of learn about these, different things across culture. Eye gaze is, the fourth form we'll talk about, for nonverbal communication. So, is the client looking directly at the screen? Are they always looking down at the floor?

Are they looking off to the side a lot? You know, sometimes that's based off of culture, sometimes that's based off of concern of who's, you know, listening on, the other side of the screen that you can't see. So it's really important to take into account eye gaze. Touch may sound odd to talk about in this virtual setting, but it's another cue you can look for.

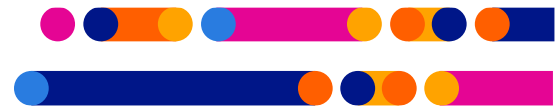
If someone, like, you know, nudging the person to try to get them to stop sharing? Is someone, pinching their skin or picking at their skin? You know, is that nervousness? Is it a new health concern? Or maybe it's really nothing at all. And finally, another thing to think about is your client's appearance.

So, if someone's ungroomed in clearly dirty clothing, they have unexplained injuries. they appear to be under the influence of drugs or alcohol. These are all pieces you should consider in how you interact with your client, and then the type of follow-up that you take next. So, there are two type of environmental cues that we're going to talk about today. Those are visual and auditory.

You know, the nice part about being able to see someone's surroundings, those visual cues, is you're able to check and see if there's anything concerning. So. Poor sanitation or upkeep? Is that a health problem, or is there a need for cultural orientation? If you see, drugs or alcohol on screen, or if the client consumes something like that during the call, that can be a serious sign of safety and health concerns.

They could also have immigration-related consequences, so you can approach this carefully and in partnership with a supervisor for assistance. The last visual cue that I'm going to point out is violence. Even if the person on screen doesn't have visible injuries, holes in the wall, broken items, these all could signify that there's violence happening in the home.

And again, this is kind of the type of scenario where you need to notify your supervisor and kind of determine if any action is needed. Auditory cues can be really helpful, and those can happen even when you're just on a phone call. So probably the most frequent one that I've experienced is that smoke detector beeping in the background. That's a, you know, moment of cultural orientation.



Explain to the client why it's important to dress that for their safety, and how to change out, smoke detector batteries anytime they hear it making that noise.

When you're on a call, you can maybe hear someone yelling in the home, doors slamming, there's, you know, just some things that may cue you into concerns for the client's well-being and their safety, that you can use that information in how you approach the client's services. So, unfortunately, there are times when you may need to respond to a crisis, and so there are going to be these steps that you need to take.

If you can go ahead and advance one, thank you. So first is identify the risk. If you know there are risks, or after an incident has occurred, you can co-design a safety plan with clients, even in remote settings. We have a lot of resources about safety planning that you'll find in the chat. And on our website. If you see a risk unfold, like, on a call in front of you.

You can ask the client to kind of confirm what's happening visually, or, you know, you can confirm, again, by... if you have a video call going. Make sure you know where the client is, so confirm that information. You know, do you have the correct address, the best number to... call them back if you get disconnected. You want to confirm who is also at the place with them. Do they have kids? Are the kids home?

Maybe a relative came home, and you didn't know that that relative was also in the home. But that information can be helpful, you know, as you're kind of responding to a crisis, remotely. Another thing that's really important is to remain, on the call with the client. Let them know that you're going to be with them until the crisis passes. Staying on the phone also helps to collect information about what's happening.

And then we suggest, like, keeping a second phone, like a charged cell phone with you, so you're able to maybe contact your supervisor if you need to, contact emergency responders while you're remaining on the call with the client. And that way, you're able to, you know, relay information without losing contact with the client. You know, you'll want to use those de-escalation techniques.

And remain calm and professional, to help demonstrate presence in the moment. If you're a supervisor or a manager, and you want to kind of further develop your critical incident response protocols, we've got a great Switchboard toolkit that is going to be popped in the chat for you to be able to refer back to. Alright, so I mentioned, creating virtual safety plans, so let's discuss that a little bit.

First, remember the safety plan needs to be in the client's preferred language. You can also try to match the vocabulary the client is using when creating their safety plan. One thing you can do is using, symbols in your plan. So, safety plans don't have to be entirely words, you can use symbols.

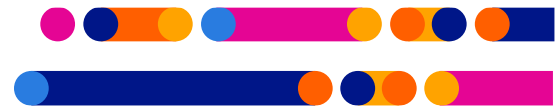
It's a great way to help a client remember what to do, or assist a client who doesn't, read, so they have kind of a visual guide of the steps that they plan to take. Visuals and phone numbers may be all a client really needs in order to take action. Safety plans don't have to be a written document sent through email. Send the safety plan through text or chat.

Another idea that we have is if you are working with someone who's not able to read, is maybe recording the safety plan. So the client has an audio file that they can listen to and kind of recall the resources that they've identified as part of their safety plan.

Because we're talking about support in a virtual setting, we also want to make sure that the, you know, plan is kept safe, so maybe you tell the client how to password protect it, or hide it in a hidden file on their phone, and, you know, help them think through how they're going to keep their safety plan information private. I'm going to hand it back over to Maya for the next case study.

MW: Thank you, and I'm gonna move... we had a couple pieces here. I'm gonna move through it a little more quickly so we can get to our last section as well, but we are gonna come back to Marie. I want you to, just know that the next Part of her story discusses interpersonal violence and abuse.

We encourage you to participate in ways that feel comfortable and to take care of yourself throughout the session, and if you want to step out, we completely understand. So, you've had a series of good virtual meetings with Marie and Agustin. Sometimes Agustin can't attend because he's at school, but in all the meetings, both of them spoke openly, were smiling, they appeared in good health.



You reach out a while later to check in, Marie texts you, she's not feeling well. She doesn't want to talk. After a few more check-ins, she reluctantly agrees to speak on video. When she logs on, you notice a broken lamp behind her. She appears to have a bruise on her cheek. She's very soft-spoken. She's frequently looking off-camera. She avoids your eyes when you ask if she is alone in the room.

So, instead of asking for you to put this on Slido, I just want you to think for a moment, and that Case scenario has been put in the chat as well, of what are the nonverbal and environmental cues that you're getting from Marie that are indicating a safety issue. I know that you're seeing a lot of red flags here. That... from those cues that Kristen talked about, So, think about those cues.

Following your video call with Marie, you consult with your supervisor, and you develop a plan to follow up. Over the next few weeks, Marie opens up. She tells you her new boyfriend has been abusing her. Today, on your scheduled call, Marie starts crying immediately. She says her boyfriend just beat her up out of anger and went out to drink.

She's alone in the home right now, but does not know how long she has before he returns. So you're on the call with Marie right now. We'll go back to Slido for this. What might you do first to prioritize her safety? Okay, this is just a moment, or you can even just think about what's your first step Yeah, ask who's there. Can you have this conversation privately if, someone's there providing shelter information?

So what are the connections, the in-person resources for someone who's experiencing interpersonal violence, checking in on her safety? ask her what she would like to do. I love this survivor-centered work. What does she need from you? How can you best support? What other resources, and supports are available? Does she need medical attention?

Does she need to relocate to a safe place and get back to you? help her contact the crisis shelter, trying to calm her. What would be most helpful in this moment? There's this moment, and then there's the planning ahead, right? But these are all really great. And I think highlights that safety is, it's very similar in some ways to that in-person work.

That, you know, we're offering support, we're checking what she needs, you make sure you have her address if something escalates. Does she have a safe place to go? Have you already worked on a safety plan? And can you review it? So, great work.

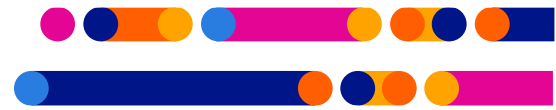
So for the last Slido, again, I want us to have time for our last section, so I just, want to have you think about, as a fully virtual service provider, what actions might you take to help ensure Marie and Augustin's safety moving forward? Again, we won't go through this now, but just think about how you can support that safety virtually. I'm going to pass it to Kristen for our final section.

Evaluate pros and cons of virtual platforms based on client needs and organizational resources

KA: Thanks, Maya. So, we're going to go ahead and go into evaluating pros and cons of virtual platforms based on client needs and your organizational resources. So, first we'll do, we're gonna skip our Slido in the interest of time, and moving in, we're gonna go ahead and do a quick review of the five areas of digital access that Maya mentioned.

It's connectivity, devices, digital literacy. support and socialization, and security, safety, and accuracy. So let's start to consider, things to think about when we are, thinking about like, technology for our clients. First we have connectivity. We need to think about what phone and plans and internet access clients have. So they're able to really use our services effectively.

We also talked about devices, so think about, like, do your clients have smartphones or tablets? Do they have a way to do a video call? So these are all the things we need to think about so they have access. To the technology you're going to use for the case management you're delivering. For digital literacy, it's not only important for clients to interact with your services.



They're also going to interact with a wide variety of functions that happen in the digital sphere. So if clients don't have digital literacy needed to safely and effectively engage, what training or support can you offer so these services become within reach? Support and socialization, so the support side is, like, what technical assistance can you provide?

Are you able to kind of help someone troubleshoot coming on and off video, using their mic? That way, they feel really confident once the actual interaction starts. Socialization, there are some really great things happening across our network.

In terms of, different, local resettlement providers having remote classes, social groups, that support clients' social and emotional needs, so there are definitely some great practices. We'll, hopefully be able to bring, more information to you through Switchboard in this coming year. Finally, we want you to consider about the safety, security, and accuracy of the technology you're using.

Things like transmitting information, submitting documents, we want to make sure that you are thinking about what you share and how you share it, so all three aspects of these are, respected in this remote setting the same way you would respect them in in-person services. So, we want to talk about budgeting for technology. First, we want to make sure that our clients have digital access, so there's a few ways that we can support them. There were some great resources. put in the chat, earlier in the webinar, but we want to think about ways to help clients find free or reduced price internet or phone plans. You can kind of build this, you know, into maybe your budget if you don't have options for them.

Think about getting a grant, back when I was monitoring a site, I was... learned about their corporate grant that they had, where women had cell phones that they were allowed to keep if they participated in virtual ESL classes for a period of time, so There's really creative ways to do this, and really empower your clients.

And also to keep in mind when you're talking about their digital access, when you're creating budgets. To have that line item for cell, phone, and internet costs. Investing in access. So this isn't just about the device and their connectivity plan. You have to think about how you can invest in digital literacy.

So do you need to maybe add a class to your organization, or help find something maybe at a local library where they're teaching computer skills? Do you have a go-to tech person that's gonna, you know, take that phone call and help the client understand how they're setting up, you know, maybe their internet? Having quality support is going to have a positive impact on your clients and your program.

We also have to think about, budgeting for staff and organizational technology. So, while using cell phones, like, staff use their personal phones to, receive client calls can be cost savings. It also creates privacy concerns, it creates concerns about a reduced work and life balance, so it's really important To kind of think about the trade-offs for those.

Some people find that adding in, the cell phones and computers that are agency-owned helps to eliminate these concerns. I also want to recognize, that we are in a resource-constrained environment, and resources are finite.

So what you can do to help prioritize costs and evaluate the technology you use You could really be thinking about things you already have access to, things you're already, using, and how you would be able to implement them.

So one thing that I've seen some teams do is actually use Microsoft Teams, they use it in their, you know, general day-to-day office, setting, and then they're giving clients links to that, so there's no added cost. So, just think about, are there options that you're already using? Is there a free option like YouTube that can host your videos? So you're not paying a web developer to add them to your site.

It's really important to just kind of think through these trade-offs, with creativity, and think about where you can make investment. So we're going to quickly get into the nitty-gritty of choosing remote communication and information technologies. We have voice calls. Really great option, because there's no literacy required, or very minimum literacy required.



You can use these on any type of phone, You are, you know, able to call them from your office. There are some limitations, and it doesn't allow for visuals. The client has to have a phone plan, you can't share files, stuff like that. Next is the messaging apps, so text messaging, WhatsApp, things like that, where clients are already used to using them, and they are, able to easily use those resources.

However, we have to think about things like safety. encryption, you know, it requires a digital, plan, it requires digital literacy and regular literacy to do those messaging apps. Next to video calls, I really want people to think about how they're able to do video calls with clients.

You know, you can share screens, you're able to use those nonverbal cues, but there are also new privacy risks, so you can kind of tell as you go through these, there's really a balance for everything. Next would be recorded content. There are some great websites that are accessible to our clients, so they're able to watch at their own pace. There are no privacy issues, things are already translated.

I'm thinking of, like, Settle In right now, where there's a way for them to get in, learn about information. It's really geared towards newcomers. And finally, we have chatbots and AI tools. There are some great, resources, coming out about how you're explaining AI to clients, how they're able to kind of be really informed if they're using that.

So keep looking at Switchboard for resources related to AI, and now I'm gonna turn it back over to Maya.

MW: Yeah, thank you so much, Kristen. And yes, we are gonna skip our last Slido, so we have time to answer just a couple of brief questions before our survey at the end. I'm also putting in the chat, again, that webinar on AI and resettlement work next week, which is gonna get much more into that fifth column.

Again, you'll get all the slides for this, and so I encourage you to look through that previous slide that Kristen shared to look at some of those pros and cons. This is not a decision you're going to make within a day. It's something that your leadership, you know, within your agency is definitely going to think about and weigh in on. But thinking about how we can determine which platforms are going to be most useful and most available to us, recognizing those resource constraints. And that there's so much that we can do as, you know, people doing virtual and digital services. So thank you, Kristen, for taking us through that.

Q&A Panel

MW: Just a couple of quick questions. One I wanted to, pass to you, Kristen. Someone asked live, during a call, if you see a concern about a client's safety, is it okay to create a code with that client, especially if there's, like, a domestic violence situation, so that the client can pass a message to the service worker that they're safe in case the aggressor is around?

Is It Okay to Create a Safety Code Word with a Client in a Domestic Violence Situation?

KA: Yeah, I think this is a great idea, where you're able to say, kind of like we said, there's, you know, the alphanumeric code, or the code word for knowing that you're on the call with a trusted provider.

You could do the same thing if you have a client that you know there have been, you know, history of domestic violence, in the family before, that they would be able to, you know, like, say that code word, and the service provider would know, hey, things are okay, or also, hey, things are not okay. One of the things that, was shared in our digital tip sheet on safety and security.

In, like, nonverbal communication as this, like, hand gesture where you slowly, like, you know, put your hand up, you close in your thumb over that, and that's a, like, becoming this universal signal for help. You can teach clients. that as well. You know, if in case they're on a video call, maybe they could quickly do that. You see it, and you know, hey, I need to do something.

So, really great question, thanks for that. Anything else, Maya?



Conclusion

Reviewing Learning Objectives

MW: I think that's all we have time for. As I close out our learning objectives, a lot of the questions that came in, I think, have been addressed, so we do hope that today, in this introductory webinar, you're now able to describe virtual and hybrid services and the importance of digital access and remote case management, implement approaches to build trust and improve communication with clients in remote interactions. Apply key safety practices, protecting clients' privacy, personal information, and well-being, and evaluating pros and cons of virtual platforms based on client needs and organizational resources. We have two recommended resources slides here. They are going to be sent to you, and they will be available on our website within 24 hours.

One is about client-facing resources on digital safety, which was a question we got in the Q&A. So I shared some of those as well, but they are in many languages. I encourage you to share these with clients and look over them yourselves.

And then other Switchboard resources on virtual and information services, on digital literacy, on working with interpreters, and there will be an accompanying tip sheet to this webinar soon, so be on the lookout once that's published, in addition to the recording of this webinar. So now we really ask, you to help us help you.

Please scan this QR code, or, go to this link in the chat, and I know we're at time, but if you can please, please fill out this survey, click that link, even if you have to run to another meeting. It's just four questions, and it's anonymous. We really do read your feedback to improve our future training and technical assistance. Again, there's a lot of content to cover today.

Really appreciate how, active the Q&A was. And hopefully I was able to answer some of those things there. A lot of the pre-submitted questions were about that direct communication, you know, working with clients to build rapport virtually. Thank you so much for being here. Please fill out that survey, and please submit a technical assistance request to Switchboard. Reach out to us, email us, follow us on LinkedIn.

We would love to support you further in your learning needs. Thank you, everyone.

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