



Today's Speakers



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Learning Objectives

By the end of this session, you will be able to...

Describe

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

01

Implement

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

02

Apply

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

03

Evaluate

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

04



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Describe

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

01

02

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04



**How much do you currently
engage in remote case
management?**



Remote Case Management

Virtual

Hybrid



Defining Virtual Services

Virtual and information services (VIS) range from human-led virtual assistance—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.

Defining Hybrid Services

Hybrid services incorporate both in-person and virtual elements to engage newcomer clients.

Hybrid programs often include specific protocols or guidance about which services are conducted in-person or remotely.



Over 50% of the 500+ refugee service providers interviewed work in hybrid arrangements and/or deliver at least some services virtually.



Frequently cited benefits of remote services included:

- Increased accessibility for clients facing transportation, mobility, child care, geographic, or scheduling barriers
- Greater flexibility in scheduling, communication, and service delivery
- Improved efficiency, timeliness, and responsiveness
- Expanded reach to rural and geographically dispersed populations

Frequently cited challenges of remote services included:

- Limited digital literacy, device access, Internet connectivity, and recurring technical barriers among clients
- Language barriers and limitations on interpretation in virtual contexts
- Challenges building trust, rapport, and meaningful connection in virtual environments
- Increased staff workload related to troubleshooting technology and coordinating remotely

Herman, B., Potocky, M., Rodgers, G., & Zanoni, K. (2026). *Virtual Services and Artificial Intelligence (AI) in U.S. Refugee Service Delivery*. Switchboard, International Rescue Committee. <https://www.switchboardta.org/resource/virtual-services-and-artificial-intelligence-ai-in-u-s-refugee-service-delivery/>



Office of Refugee Resettlement (ORR)

Policy Letter 22-04 October 25, 2021

“Virtual Refugee Service Delivery and Elements of Program Administration”

ORR seeks to improve client access and to enhance the services offered to clients through allowing **a variety of complementary modes of delivery** (e.g., 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 is in the best interests of ORR-eligible populations.**

A photograph of a classroom setting. A female teacher with long brown hair is leaning over a desk, smiling and looking at a computer monitor. Two young students, a girl and a boy, are sitting at the desk looking at the monitor. Another boy is visible in the background, also at a computer. The scene is brightly lit and shows a typical school computer lab environment.

Digital access is the ability of individuals to connect to and effectively use the Internet and digital technologies.



Five Core Areas in Digital Access



Connectivity

Affordable, robust
Internet and
broadband



Devices

Affordable
technology
appropriate to
newcomers'
specific needs



Digital Literacy

Training on how
to use and
access
technology



Support and Socialization

Technical
troubleshooting
and learning;
supporting social
connections
when possible



Security, Safety & Accuracy

Protecting clients
from danger,
scams, and
misinformation

Why is newcomer digital access important?

Benefits for newcomers:

- Increased access to remote services
- Improved communication and coordination with providers
- Improved outcomes and self-sufficiency
- Meaningful participation in our increasingly digital society



Why is newcomer digital access important?

Benefits for service providers:

- Improved client engagement and collaboration
- Expanded service reach and strengthened service continuity
- Less time spent training clients and facilitating routine tasks
 - Leads to increased service efficiency; optimized staff time and resources
- Less burnout due to increased client independence



Providers are key to high service quality in remote services with newcomers.

Herman, B., Potocky, M., Rodgers, G., & Zanoni, K. (2026). *Virtual Services and Artificial Intelligence (AI) in U.S. Refugee Service Delivery*. Switchboard, International Rescue Committee.
<https://www.switchboardta.org/resource/virtual-services-and-artificial-intelligence-ai-in-u-s-refugee-service-delivery/>

Clients perceived virtual care positively when...

- Providers fostered trust, emotional support, and dignity
- Services were culturally and linguistically responsive

“Service quality in virtual environments is shaped primarily by provider practice rather than by technology alone.”



**Whether in virtual
or hybrid services,
always approach
any remote
interaction with
intentionality.**



Case Scenario: The Khaled Family

Parents: Ahmad and Samira

Children: Mohammad (10), Hasan (6), and Layla (1)

The family recently arrived from Iraq as Special Immigrant Visa (SIV) holders.

Ahmad is fluent in English, but Samira and the children have almost no prior English exposure. Ahmad is also the only family member who has ever used a computer, but both parents arrived with very basic smart phones, though 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 hybrid service delivery.





What actions can you take to support the Khaled family through remote case management services?



Implement

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

01

02

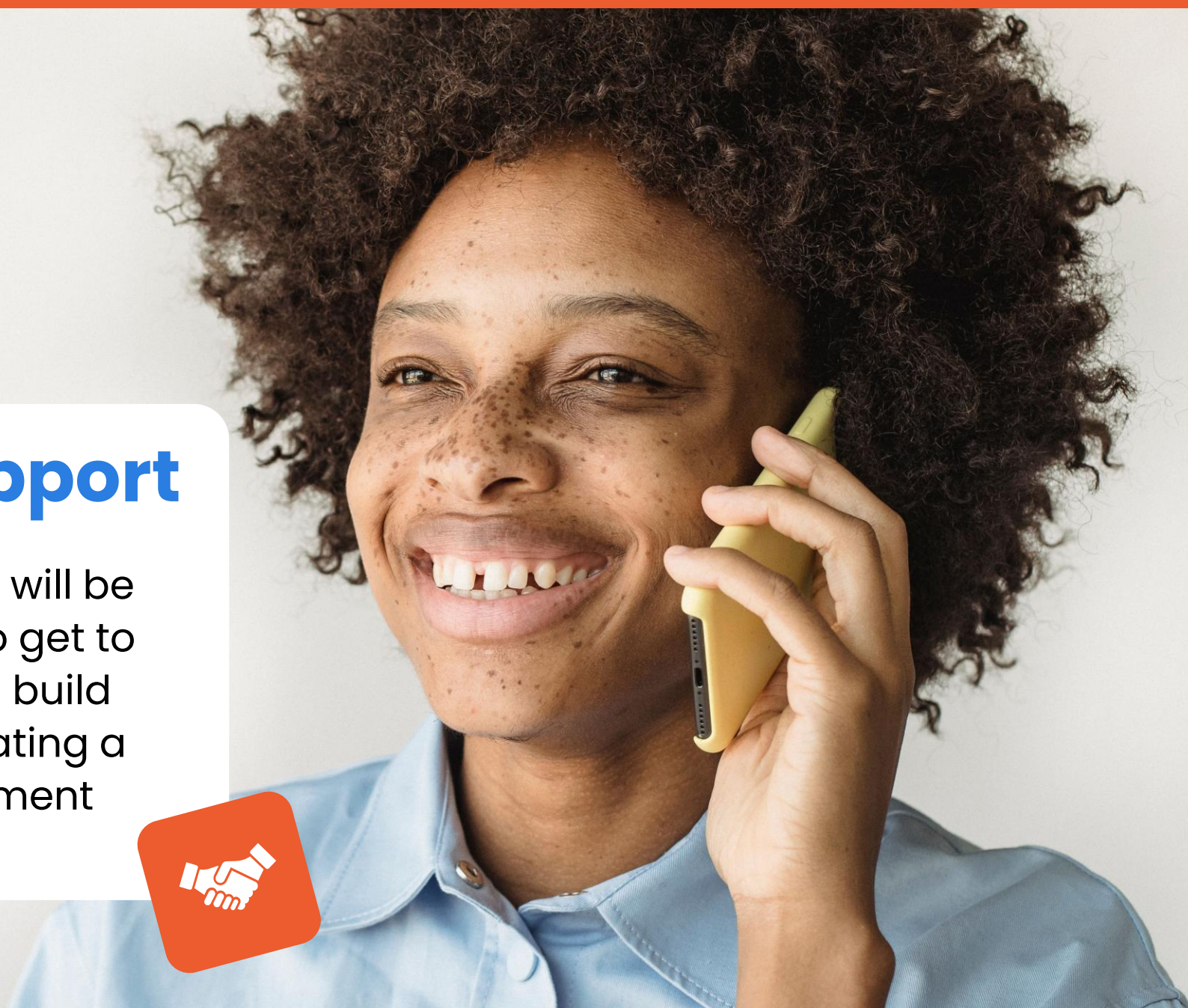
03

04



Building Rapport

Even if all interactions will be remote, taking time to get to know your clients and build trust is crucial for creating a strong case management relationship.



Approaches to Build Trust & Communicate Effectively in Remote Settings



Warmth



- Introduce yourself and greet the client by name
- Smile
- Ask questions and make friendly conversation
- Reference previous conversations

Clarity



Mars

- Communicate in plain language and short sentences
- Be specific
- Check often for understanding
- Summarize key points and next steps

Consistency



- Always check who else is present
- Explain and remind about privacy
- Maintain regular communication
- Be dependable
- Ask what went well and how you can improve virtual communication

Choosing How to Meet Remotely

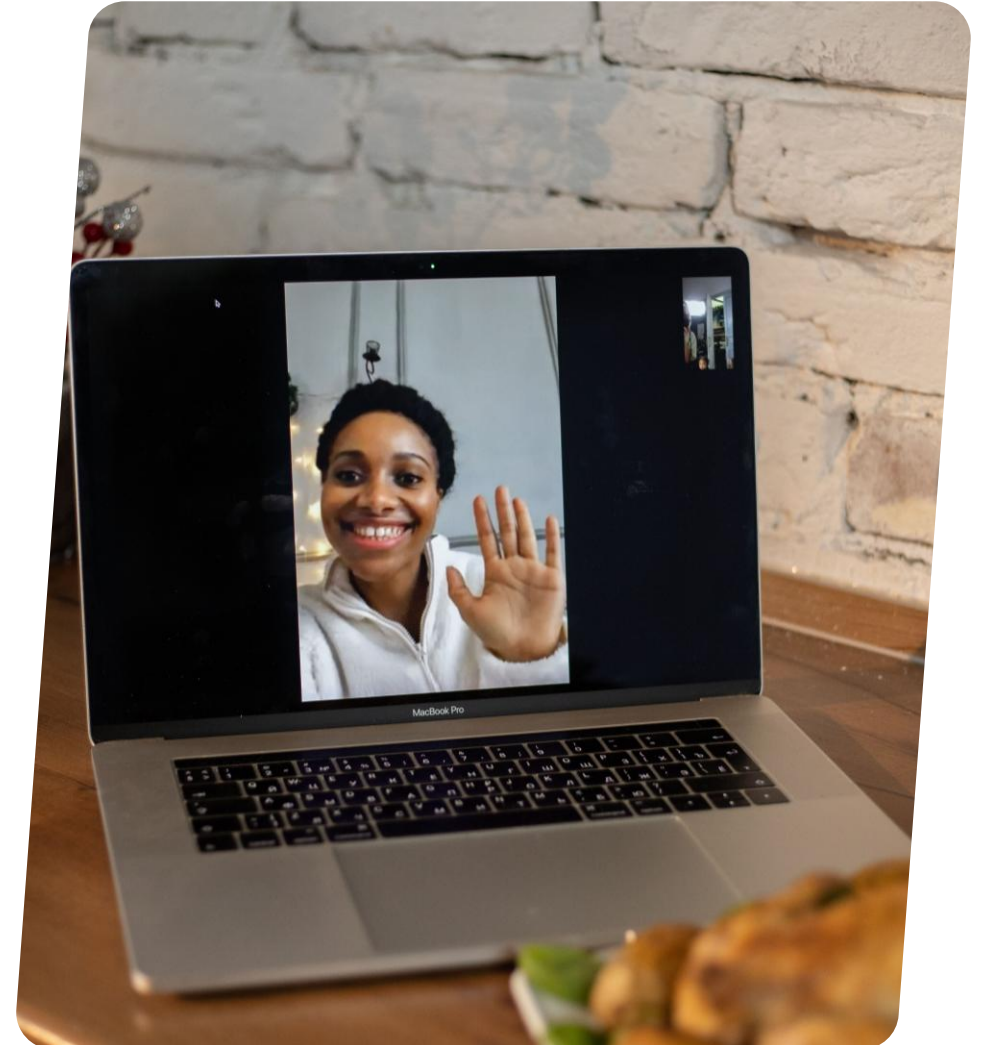
- Try to **honor client preferences** for communication
- **Video calls** are often best and most personable
- Some interactions may be better suited for **text messages or phone calls**
- In fully virtual services, it is best practice to have **at least one video call** early in a case management relationship



Other Tips for Meeting Remotely

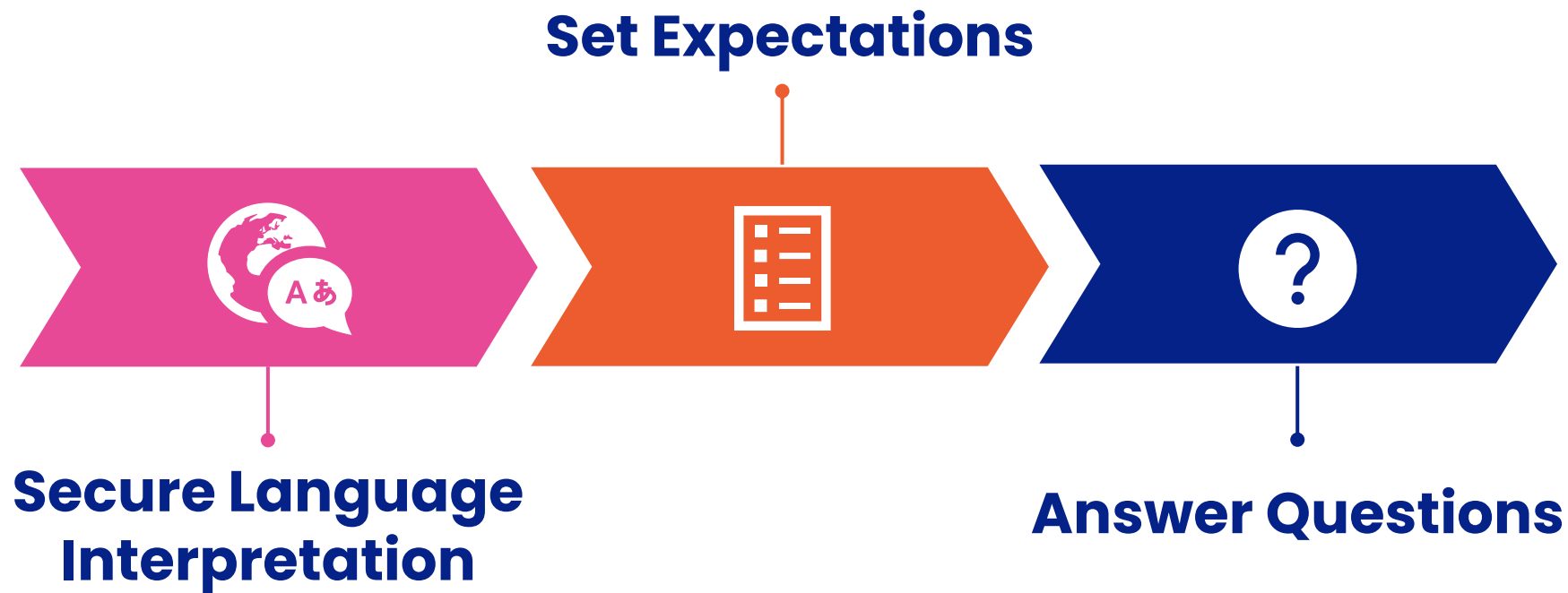
- **Maintain standard meeting decorum** (e.g., be timely, do not eat in front of client)
- **Plan for technical difficulties**
- **Consider what kind of signature is needed on paperwork** (physical or electronic), and adopt a **verbal consent protocol** when appropriate

“staff received client’s verbal agreement that they understood and consented to the service plan”





Setting Up Remote Communication for Success



Mitigating Common Challenges in Remote Interpretation



Technical Issues

- Have back-up plan in case tech fails

Interpreter Fatigue

- Remote interpretation is taxing; take regular breaks

Confusion or Miscommunication

- Strive for clear, intentional communication, and leave space for clarification
- Explain communication procedures (e.g., how to handle interruptions and requests for clarification)
- Check for understanding through open-ended questions and teach-back





Case Scenario: Marie and Agustin

Marie and Agustin are clients from Haiti. Marie had Agustin when she was a teenager in Port-au-Prince, and he is now 16 years old. They have lived in the U.S. for a while but 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 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 or meet with you. She says she is not sure they even need any support services.





What support could you provide to help Marie access and use available virtual services?



When providing hybrid services, what should you keep in mind to meet the needs of all family members?



Apply

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

01

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“Digital technologies can be a vehicle for refugees’ self-reliance—but only if communities are empowered to use them safely and effectively.”

Jenny Casswell, UNHCR

Digital Literacy and Essential Digital Skills Specialist



The dangers of not applying safety practices



- Puts client data and personally identifiable information (PII) at risk of theft or exploitation
- Breaks confidentiality and professional ethics in serving vulnerable populations
- Damages client's trust and safety in case management services

Privacy in Remote Conversations

Confidentiality standards still apply for all remote interactions.

- Make sure clients can communicate **without being overheard and feel safe to speak**
- If working from home, ensure your own **working space is private** and cannot be overheard by family members or roommates
- **Inform clients of limitations to confidentiality** (e.g., mandatory reporting, threats to safety)
- **Ensure Internet security measures** and HIPAA compliance when possible



Protecting Personal Information and Sensitive Data

- Use releases of information (ROIs)
- Lock filing cabinets and screens
- Share files through encrypted or safe systems (both clients and providers)
- Never store PII on personal devices
- Be mindful of what technology you're using and where data is shared
 - E.g., is AI embedded in the tech? Does it share data externally?

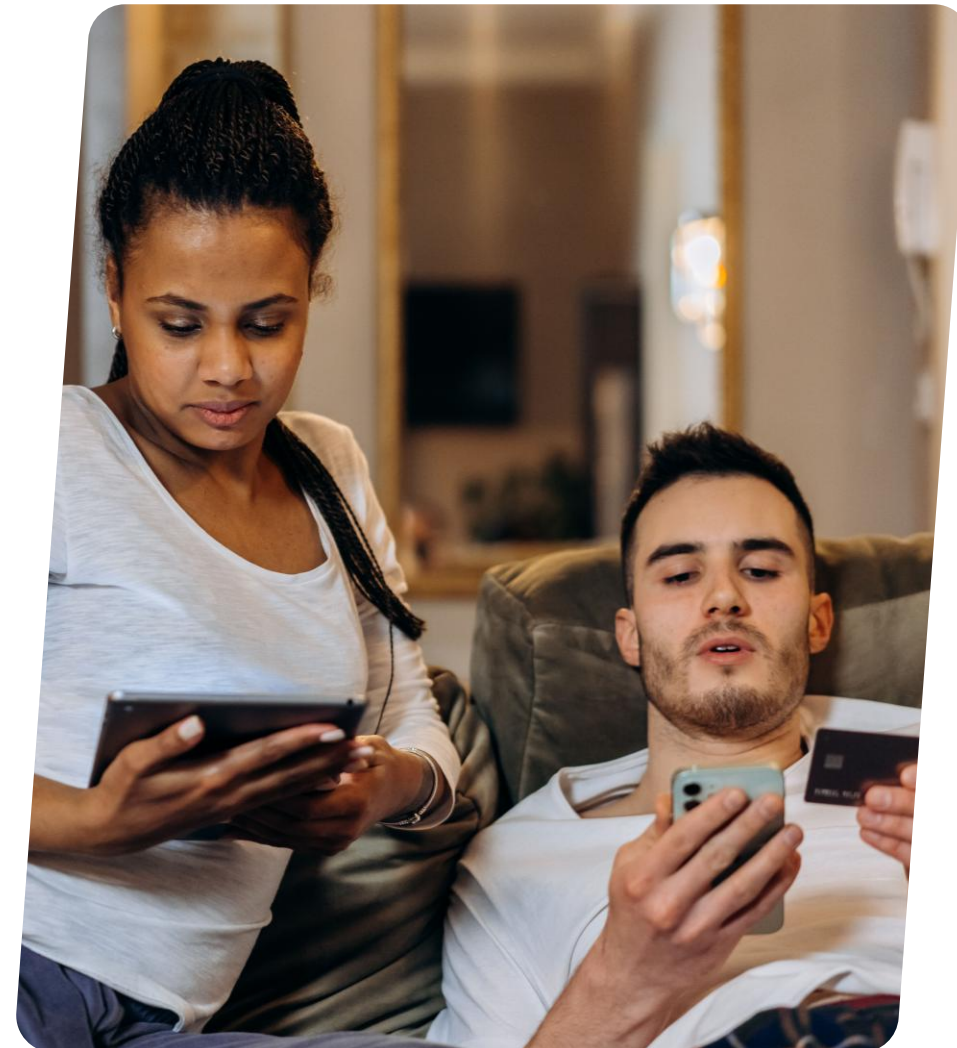
It's everyone's responsibility!





Teaching Clients about Digital Safety

- Educate clients early and often about [red flags](#)
 - Misspelled URLs, telephone requests for PII or SSNs, urgent or threatening language, generic greetings
- Teach **scam recognition** through real examples
 - The government will only communicate for payment or information **in writing**
- Mitigate risk of someone **impersonating a service provider** to collect sensitive information from clients
 - Assign clients a private alphanumeric code so they identify themselves only to verified providers
- Educate families about **virtual threats to youth** such as [online sexual abuse](#), and integrate [digital citizenship](#) into youth programming





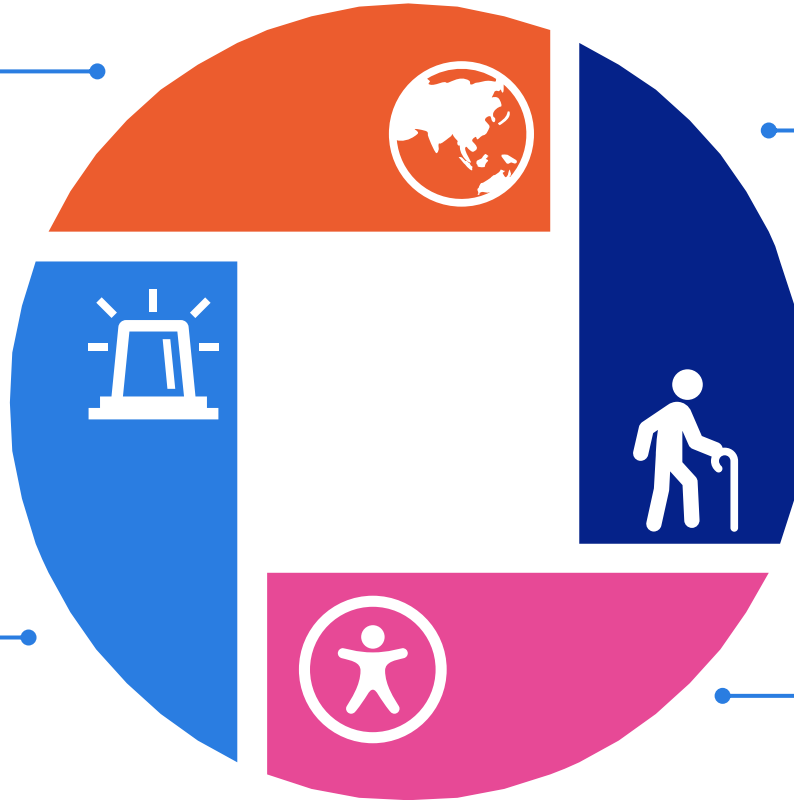
What is one practice you might adopt to further protect client's privacy and personal information?

Assessing Client Well-being through Nonverbal Communication



Cultural Differences

Learn about culturally specific nonverbal communication cues



Contextual Differences

Age, sex, and social status can affect nonverbal communication

Noticing Changes

Significant changes in a client's communication may indicate reason for concern

Holistic Awareness

See nonverbal communication as a whole to fully understand the client's situation



Nonverbal Communication Cues

**Facial
Expression**

**Gestures and
Paraverbals**

**Body
Language
and Posture**

Eye Gaze

**Touch and
Personal
Space**

Appearance

[Switchboard Tip Sheet: Nonverbal Communication and Safety Cues \(2026\)](#)

Environmental Cues

Visual Cues



- Poor sanitation or upkeep
- Signs of substance abuse
- Signs of violence

Auditory Cues



- Smoke detector beeping
- Yelling
- Doors slamming

Responding to Crises Remotely



01

Identify the risk

If there is known risk, plan proactively with safety plans. If you identify a new risk, ask the client or get visual confirmation.

02

Confirm information

Always make sure you know where the client is and a good callback number.

03

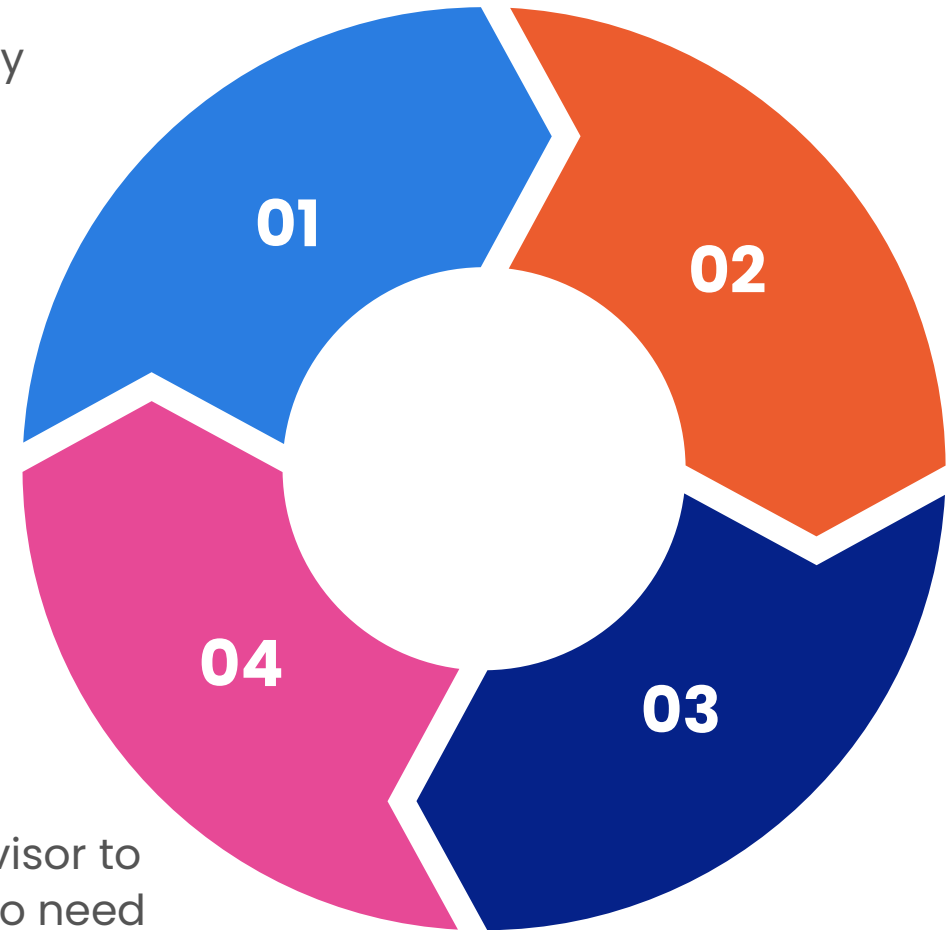
Remain on the call

Let the client know you will stay on the line with them until the crisis passes. Use de-escalation techniques and a calm, professional tone to help demonstrate presence in the moment.

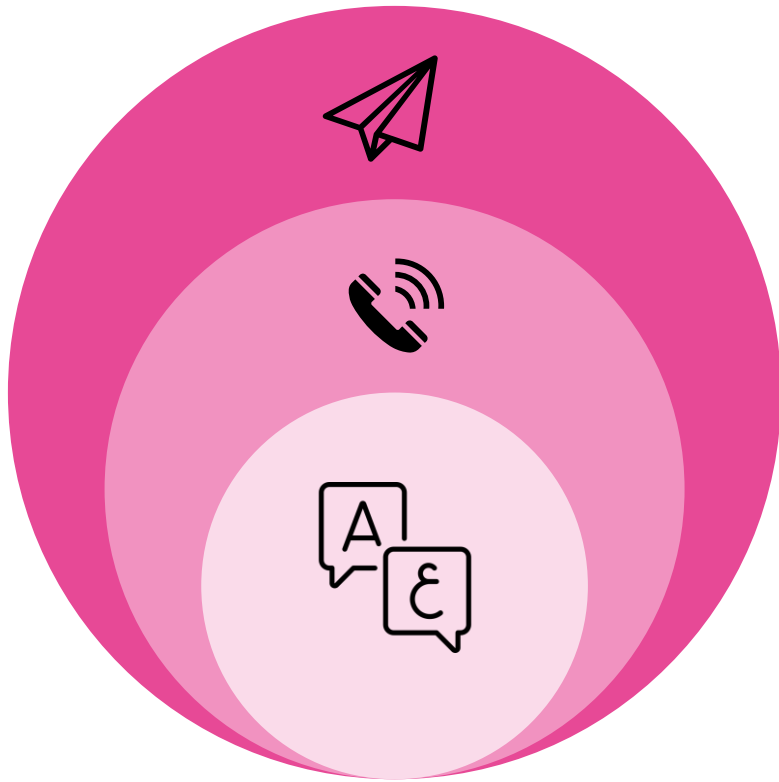
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Contact supervisor and document

Use a second phone line to contact your supervisor to make them aware of the situation. You may also need to contact emergency services on the second line.



Strategies for Virtual or Remote Safety Plans



Support safe transmission and storage of the safety plan for the client

Text them the plan or record a voice note if they lack literacy. Help them strategize how they will keep the plan private.

Use symbols or pictures

Visual reminders and phone numbers are key in an emergency; avoid too much text.

Use the client's preferred language

Use plain language and match the client's own words and vocabulary.



Please note the following case scenario discusses interpersonal violence and abuse.

We encourage you to participate in ways that feel comfortable and to take care of yourself throughout the session.



Case Scenario: Marie continued

You had a series of good virtual meetings with Marie and Agustin. Sometimes Agustin can't attend because he is at school, but in all the meetings both of them spoke openly, were smiling, and appeared in good health.

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





What nonverbal and environmental cues from your video call with Marie may indicate a safety issue?



Case Scenario: Marie continued

Following your video call with Marie, you consult with your supervisor and develop a plan to follow up. Over the next several weeks, Marie opens up and tells you her new boyfriend has been abusing her. Today on your scheduled call, Marie starts crying immediately and says her boyfriend just beat her up out of anger and went out to drink. She is alone in the home right now but does not know how long she has before he returns.





**You're on the call with Marie.
What might you do first to
prioritize her safety?**



As a fully virtual service provider, what actions might you take to help ensure Marie and Agustin's safety moving forward?



01

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Evaluate

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



What apps or technologies are you already using in virtual or hybrid services?



Five Core Areas in Digital Access



Connectivity

Affordable, robust
Internet and
broadband



Devices

Affordable
technology
appropriate to
newcomers'
specific needs



Digital Literacy

Training on how
to use and
access
technology



Support and Socialization

Technical
troubleshooting
and learning,
supporting social
connections
when possible



Security, Safety & Accuracy

Protecting clients
from danger,
scams, and
misinformation

Considerations in Selecting Technology



Connectivity

Does the client have access to an active phone plan and the right connectivity to use this technology effectively?



Devices

Are you supporting clients in having the devices they need to access your selected technology?



Digital Literacy

Does your selected technology require training or digital literacy support for clients to use it effectively?



Support and Socialization

Can you provide technical support?
Does this technology contribute to relationship-building and mitigating isolation?



Security, Safety & Accuracy

Does it protect the service provider's information?
Is it secure for transmitting clients' personal information? Does it have accurate information for clients?

Budgeting for Technology



Clients' Digital Access



Financially Support Client Access to Technology

Invest in, budget, and grant-write to support clients in securing free or reduced-price Internet and devices



Invest in Access

If you are growing virtual or hybrid services, how are you supporting clients to access them meaningfully? Can you provide quality tech support?

Staff and Organizational Tech



Support Client Privacy and Staff Well-being and Boundaries

Investing in work devices (phones, computers) protects client information and staff's personal contact info and helps uphold staff work-life balance



Prioritize Costs and Evaluate Availability

What is most important to your staff? What services do you already pay for or have included? What free options are available?



Remote Communication and Information Technologies



Voice Calls

- ✓ Minimal literacy
- ✓ No smartphone
- ✓ Can call from office phone
- ✓ Conference calls
- × No visuals
- × Requires phone plan (calls or data)
- × No sharing files or photos
- × Potential social isolation



Messaging Apps

- ✓ Commonly used (esp. WhatsApp)
- ✓ Easy to share photos and files
- ? Encryption, safety, and privacy protection varies
- ? Voice recordings
- ? Requires reading
- × Digital literacy
- × Requires phone data or plan



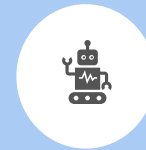
Video Calls

- ✓ Phone or computer
- ✓ Screensharing
- ✓ Prescheduling meetings/calendar invites
- ? Encryption, safety, and privacy protection varies
- ? May require training to use
- × Requires Internet connection and video camera



Recorded Content

- ✓ Watch at your own pace
- ✓ No privacy issues
- ✓ Variety of topics in many languages
- ✓ Conserves staff time
- × No person-to-person connection
- × No way to clarify or ask questions



Chatbots and AI tools

- ✓ Access without appointment
- ✓ Multilingual
- ✓ Interactive
- ✓ Conserves staff time
- ? Data privacy
- ? Accuracy
- × AI literacy
- × No person-to-person connection



What new kinds of technologies and digital resources might you consider for your program after this training?



Learning Objectives

Now you are able to...

Describe

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

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Client-Facing Resources on Digital Safety

Settle In Multilingual Resources available in 7+ languages:

- [Common Signs of Identity Theft and What to Do if You're a Victim](#)
- [Digital Awareness for Newcomers in the United States](#)
- [How to Protect Yourself on Social Media](#)

CARRE resources for children and youth in 10+ languages:

- [7 Tips to Stay Safe Online](#)
- [Online Safety Tip Sheet](#)



Switchboard Resources

- **Research Summary:** [Virtual Services and Artificial Intelligence \(AI\) in U.S. Refugee Service Delivery](#) (2026)
- **Guide:** [Talking with Newcomers about Artificial Intelligence \(AI\)](#) (2026)
- **Tip Sheet:** [Introduction to Digital Literacy: Three Tips for Supporting Newcomers' Digital Skills Development](#) (2026)
- **Guide:** [Increasing Newcomers' Digital Access for Effective Virtual and Information Services \(VIS\) Programming](#) (2026)
- **Guide:** [Key Findings from the Annual Survey of Refugee Service Providers \(ASRSP\) Pilot](#) (2026), see [Key Insights on Direct Service graphic](#)
- **Toolkit:** [Working with Interpreters](#) (2026)
- **Guide:** [Delivering High-Quality Virtual and Information Services \(VIS\) to Newcomers](#) (2025)
- **Guide:** [Promoting Client Safety and Security in Virtual Settings](#) (2025)



Introduction to Digital Literacy

Three Tips for Supporting Newcomers' Digital Skills Development

This tip sheet will help you incorporate digital literacy into your case management practice to support newcomer clients in building self-sufficiency. When clients improve their digital literacy skills, they gain confidence and are better equipped to engage with you, other service providers, and their new communities. Use the tips and resources below in coordination with your organization's broader digital access work on connectivity, devices, and online safety. For more guidance on digital access, see Switchboard's resource on [Increasing Newcomers' Digital Access](#).

Digital literacy refers to the skills needed to use digital tools in everyday life.

Digital access is the ability to connect and use digital technologies. This includes connectivity, devices, digital literacy, and online navigation and safety.

1. Recognize what digital skills your clients already have and pair with their goals.

Effective case management should always begin with identifying your client's goals and assessing the skills and strengths they already have. The same is true of empowering newcomers to increase their digital literacy skills. Start by **asking open-ended questions about the client's digital literacy goals**, including how they would like to use their digital skills. A client who wants to apply for a job will need different support than a client who wants to communicate with their child's school via an online portal. Next, **discuss any digital skills the client already has**. For example, many clients may already use a smartphone for social media or have created an email address. These are **transferable skills**. For instance, logging into an account is often similar regardless of the portal.

After discussing their goals and skills, it may be useful to have the client **take an assessment** of their digital skills so you can approach the next steps for learning through a strengths-based model. By highlighting their existing strengths and transferable digital literacy skills, clients will feel more empowered to learn. [Northstar](#), a program recognized by the U.S. Department of Education offers free digital skills assessments designed for real-world skill development. Below are examples of these assessments:

- Basic computer skills assessment asking if the client can identify a power button or the camera
- Essential career search skills assessment asking the client which tasks are important to finding a job
- Social media and daily technology use assessment asking if the client can add a contact or adjust a privacy setting

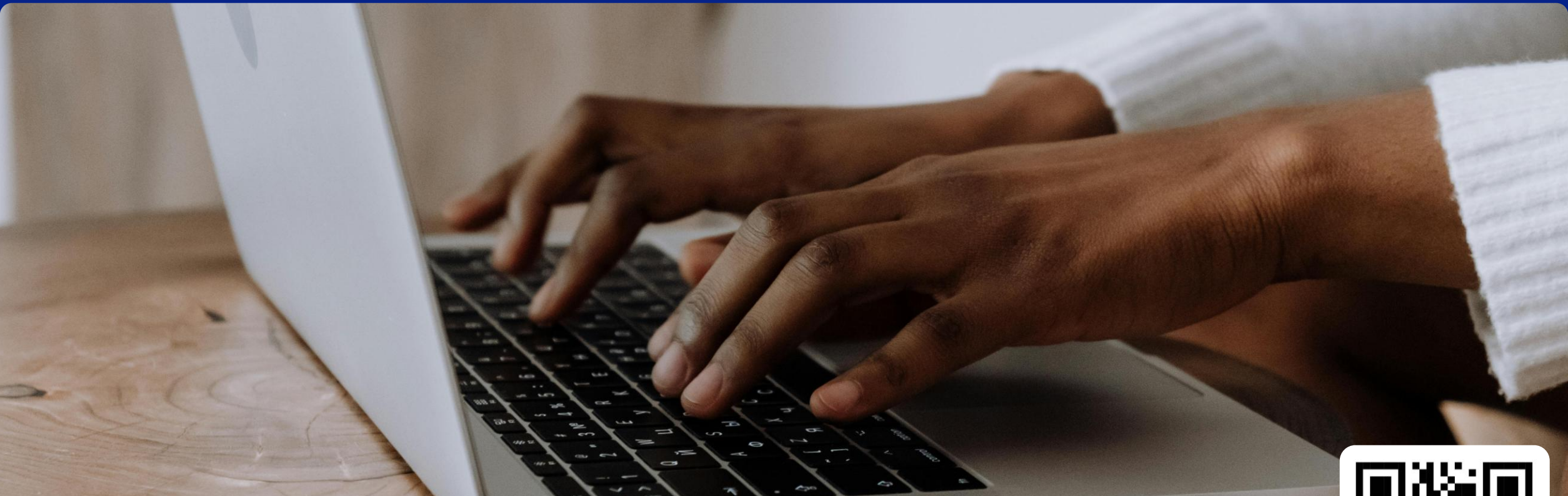
Stay Connected

✉ Switchboard@Rescue.org

🖱 www.SwitchboardTA.org

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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.

