

09.09.26 Switchboard Webinar Slide Deck - Tips and Tricks for Remote Case Management

08 - 14 Sep 2026

Poll results

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

(1/2)

- help with benefits application
- Help with school orientation and registration online.
- Training the family about digital and online communication
- Make sure to work with the both adults
- Walking them through with translation apps
- ELT referral with digital literacy classes. Transportation services offered along with internet connection assistance.
- Digital literacy
- Use an interpreter to walk through initial digital connection. Use SettleIn app
- Digital literacy. Support for internet access
- Preemployment training and find job
- Screen share to show them how to access certain things.
- Utilize an interpreter Digital Literacy training
- How to use digital technology since all the information is one click away

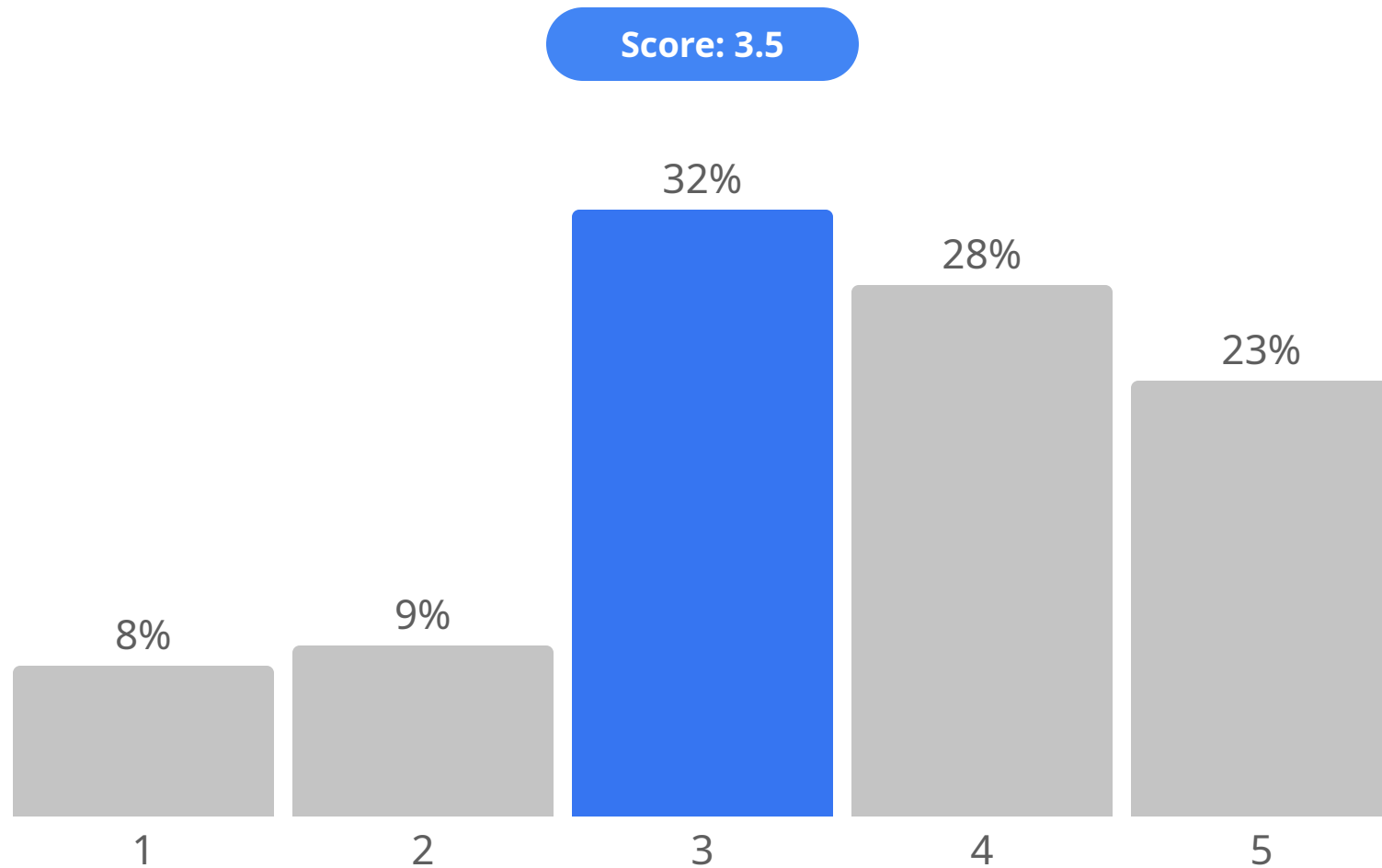
What actions can you take to support the Khaled family through remote case management services?

(2/2)

- Help them download virtual translation app
- Assisting with phone plan and provide a smart phone
- ESL online classes
- Even with an intentional plan
- Work in video call
- Assist with internet access, use reliable interpreter
- Learn about family
- Support to have phone plan,
- Help them gain access to phone service
- Ensure all adults understand how to access services
- Offer transportation services
- Provide digital lit
- work with the family to help train them in digital literacy
- Wifi
- Virtual check-in (whatsapp calls)
- Digital accessw
- call in an interpreter
- be culturally responsive
- ELI referrals
- Digital literacy

How much do you currently engage in remote case management ?

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

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(1/2)

- Speak with son to see how we can work with mom
- Provide access to Internet
- Begin with an in person meeting if it is possible. Connect her with someone in her community to help guide her.
- DO NOT PARENTIFY THE CHILD
- Explain what services they will be providing and assess for any questions. Offer interpretation services.
- Search in person trainings on technology for her and her son
- Explain services
- explaining about the services you offer and providing flyer for future access
- Contact with an interpreter to start digital literacy
- Explain about all ways
- Send instructions for her on how to use technology
- Communicating with client what her concerns are and what services might be available to her
- Interpreter services, digital literacy
- Give examples of services
- YouTube videos in Haitian

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

(2/2)

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create on how to set up and use the app

- Explain services
- validate their discomfort and break down the steps to access tech
- Do an in-person visit at the beginning to help explain steps
- Digital literacy classes
- Starts with simple phone call if that's easier for her
- Let her know what services you offer since she's unsure if she meets criteria
- Offer reassurance

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

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- As mandatory reporters we also have to ask if boyfriend hurts the son at all, gage sons safety as well
- Offer support and provide shelter resources
- Ask about her child is he safe?
- Offer support and resources (crisis)
- Make sure you have the address
- Ask if she has a safe place to go. Offer shelter information.
- Review any safety plan if there is one developed
- What would be most helpful for her now
- Try to calm her
- Ask if she is in a safe place or need medical attention
- Help her contact crisis shelter
- Ask what does she need from you
- Ask what she would like to do
- Ask her if she feels safe
- Provide Shelter information
- Ask who is around with her

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

0 1 3

(1/2)

- Self sufficiency plan for parents
- Making sure the clients know their rights and responsibilities
- Self sufficiency plan and career goals
- Be mindful of needs; do not make promises
- Who is available at the time, what are the needs, and how to best deliver care
- Frequently check in with non-English speakers to ensure they are safe and well informed
- Regular contacts
- Custom service plans and goals
- Discuss comfort level and literacy level individually. Learn who responds better to the different services.
- Self sufficiency plan for each member
- Set up a phone call instead of video meeting, and set up an Interpreter for Marie
- Ensure everyone is present and understanding the conversation when virtual conversations take place

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

(2/2)

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- Gather information first on everyone's abilities (language and technology)
- Build rapport with each individual client
- Accessibility

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

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- Include information about internet safety in a presentation to clients.
- Advise them not to share social security information with friends/family
- Call the families instead of sending sensitive information via text.
- Secure internet and private, designated space
- Avoid your personal phone for PII
- Encryption emails
- secure, password-protected internet connection
- and avoiding public Wi-Fi when accessing or discussing clients' personal information.
- Secure internet connection and encryption
- Scripts to teach about scamming.
- Encryption
- Secure internet connection
- Include PII protection awareness in cultural orientation
- Encryption
- Use tools that have end to end encryption
- Alpha numeric passwords or code word