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5 Considerations for Improving Remote Case Management with Newcomers



Refugee service providers nationwide are engaging with clients remotely through fully virtual or hybrid services. ***Newcomers' digital access***—the ability to connect to and effectively use the Internet and digital technologies—is crucial for engagement in remote case management. It's equally crucial for service providers to deliver remote services with competence and intentionality. This tip sheet offers five considerations for ***approaching all remote interactions with professionalism, empathy, and care for client safety and welfare***.

1. Consider which remote communication tool is best suited for your client and context.
Different types of technology are useful for different kinds of remote interactions. Live video chats support relationship-building, allowing in-depth conversations with visual cues. However, phone calls or text messages may be more efficient or accessible for clients, who can speak on the phone regardless of literacy level or respond with digital translation tools at their own pace. Prioritize client preferences and accessibility needs whenever possible, but try to have at least one video call early in the relationship to help build rapport. When choosing what kind of technology and which specific apps to use to reach your clients, consider these four factors:

Connectivity and Devices

Do clients have access to phone plans and the Internet, as well as the devices they need?

Digital Literacy (DL)

Do clients have DL, or can they receive the right training? Can you provide technical support?

Social Support

Does this technology help build relationships and lessen clients' social isolation?

Security & Safety

Does this technology protect both clients' and service providers' personal information and contact details?

2. Secure the right language interpretation and set up remote communication for success.
Identify the client's preferred language and dialect and determine if you will be using a professional interpretation service (e.g., a "language line" or video service) or a staff or volunteer interpreter joining remotely. Test the technology in advance, and if possible, hold a pre-session with the interpreter to align on expectations and agree on a signal to use if issues arise. Allow plenty of time for clarification and breaks, as remote interpretation with reduced visual cues can be taxing. For more on working with interpreters, refer to Switchboard's toolkit and eLearning courses.

3. Build trust and rapport with clients through warmth, clarity, and consistency.
Establishing strong working relationships with little or no in-person contact can be challenging, especially for clients who are not used to connecting remotely. The three approaches below can support effective remote communication by incorporating client-centered best practices.



Warmth Take time to establish a personal connection. Introduce yourself, smile, and greet your client by name, making sure to pronounce it correctly. Make friendly conversation, asking questions and referencing what the client has told you previously.



Clarity Communicate in plain language and short sentences. Check often for understanding. At the end of each meeting, summarize key points and next steps.



Consistency Establish expectations early and stick to them, e.g., your availability, how the client can reach you, and how often you will follow up. Have a backup way to connect if your tech fails, and periodically review how you can improve your virtual communication.

4. Prioritize privacy and safeguard all client data and sensitive information.
Client confidentiality is paramount in remote case management. Start each session by asking whether anyone else is present, and try to make sure clients feel safe to speak with you openly. If you work from home, confirm your working space is private and cannot be overheard by family or roommates, also verifying that your Internet connection and devices are secure. At the start of each session, remind clients of their right to privacy and any limits to confidentiality that apply.

Safeguard any client data and sensitive information shared and stored electronically. Never store clients' personally identifiable information (PII) on non-work devices, and always lock your screens if you step away, even briefly. Be mindful of what technology you use to process client data, and only use AI applications that your agency has vetted and approved.

Check out Switchboard's virtual safety guide and tip sheet on nonverbal communication for more on assessing and promoting client well-being in remote case management.

5. Be attentive to client well-being.
Observe clients' appearance, behavior, surroundings, and any changes that may indicate danger or distress. Even if you're not meeting in person, you are still an important connection and resource for clients who may need urgent or ongoing assistance.

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