



## Promoting Client Safety and Security in Virtual Settings


### Guidance for safety-minded virtual service delivery

Virtual services are increasing rapidly and reaching newcomer clients across the country. As providers expand into virtual services, they should be mindful of clients' safety and security needs. All caseworkers involved in virtual services should receive training on these topics. This guide provides a starting point.

### Connect with Clients Virtually

Building positive, professional relationships with clients through virtual communication requires many of the same soft skills of in-person case management, such as warmth, empathy, and approachability. These traits help build trust and the sense of safety needed for clients to disclose sensitive details and collaborate with providers on their goals.

Virtual programs use a variety of communication methods to connect with clients, including phone calls, SMS texting, messaging apps, email, and video calls. Clients may prefer certain methods of communication. If possible and allowable, ask the client what method they prefer and try to honor that choice. However, it is a good practice to hold at least one session via video call with the camera on if you can.



**“Our clients are incredibly resilient and resourceful human beings.... Involve them in their own resettlement journey.... Remind them of their strength and capability.”**

– Service provider at Switchboard’s 2025 Confluence: *Delivering Virtual Services with Limited Resources*

This helps establish trust, enables nonverbal communication and allows you to see environmental cues that might signal safety concerns.

As best practice, do the following at the beginning of each interaction:

- Remind clients of confidentiality policies, with an emphasis on the limits of confidentiality.
- Discuss plans to follow up if there are technology issues.
- Ask: “Who is in the room with you today?”

## Pay Attention to Clients’ Nonverbal Communication

Nonverbal communication is “the act of conveying information without the use of words.”<sup>1</sup> Understanding nonverbal communication from your client can help you identify potential safety concerns on video calls. Keep in mind that nonverbal communication varies by culture, so what may be typical for one client could be concerning for another.

Consider the following types of nonverbal communication:<sup>2</sup>

- **Facial expressions**
- **Gestures:** the hand movements someone makes to facilitate communication
- **Paraverbals:** the tone and volume of voice used in spoken communication
- **Body language and posture**
- **Personal space:** in video calls, this is the space between the client and their device, and between the client and others on screen
- **Eye gaze:** how clients look at the camera or their screen
- **Touch:** any touch that occurs between people on the screen; if the client is alone, any type of touch that could be abnormal (e.g., picking at or pinching skin)
- **Appearance:** how the client looks in terms of their hair and clothing—are they well-groomed or disheveled—and any unexplained injuries

It is important to weigh nonverbal communication in a holistic manner instead of focusing on only one aspect. This can provide clues for safety concerns or other issues you might otherwise miss. Over time, build a sense of what is typical for your clients; a change in their typical nonverbal communication can be a sign that the client feels unsafe.

For a deeper dive into nonverbal communication, see Switchboard’s [Nonverbal Communication Tip Sheet](#).

## Look for Environmental Clues

A client’s nonverbal communication isn’t the only unspoken clue to possible safety concerns. You can also consider other visual or auditory clues in the client’s environment.

### Visual Clues

During a video call, you may see things that could indicate there are safety concerns. Those visual cues can include:

- Poor sanitation or upkeep
- Drugs or alcohol, particularly if there are known substance use issues
- Signs of violence (e.g., broken items or holes in walls)

### Auditory Clues

Sounds you hear on a call can also be indicators of potential safety concerns. These can include:

- Smoke detectors beeping, indicating a low battery that could eventually limit the ability to alert occupants to a fire
- Yelling or angry outbursts
- Doors slamming

## Plan How You Will Respond During Crisis

It is important to prepare for what you and your organization will do if crises arise. You can plan for various circumstances using Switchboard’s [Critical Incident Response Toolkit](#). Regardless of the situation, here are key things you should do during a crisis:

1. Identify the risk and confirm with the client that you will remain on the call with them to work through the crisis together.
2. If there is an imminent threat to safety, request the client’s current location to contact emergency services.
3. Ask who else is with the client at their location (e.g., spouse, children).
4. Remain on the call until the crisis passes. Avoid ending the call and having to call back.
5. Keep a charged cell phone with you to contact your supervisor or emergency responders while remaining on the call with the client.

<sup>1</sup> American Psychological Association. (n.d.). *Nonverbal communication*. In *APA Dictionary of Psychology*. <https://dictionary.apa.org/nonverbal-communication>

<sup>2</sup> Cherry, K. (2023, October 6). 9 types of nonverbal communication. Verywell Mind. <https://www.verywellmind.com/types-of-nonverbal-communication-2795397>

6. If a [mandated report](#) is necessary, request the current location of the child/adult at risk, and gather other essential information (home address, school, siblings and ages).

## Remain Calm and Use De-Escalation Skills

To be present during an emergency, it is important to remain calm. Take a deep breath or use a physical grounding technique, like feeling your feet on the ground and noticing the sensation. Regulating your own emotions while exposed to crisis can help co-regulate the client and support them in staying calm. Consider these de-escalation strategies:

- Use a gentle voice
- Maintain composure
- Practice empathetic listening
- Position your body in a non-threatening and open manner (e.g., do not cross arms, which can be a sign of anger)
- Allow the client time to de-escalate
- Keep your responses simple
- Focus on what action you can take
- Inform client of next steps

To learn more about de-escalation, see Switchboard's guide [Preventing Crises and De-escalating Difficult Situations with Newcomer Clients](#) and archived webinar [De-Escalation in Practice: Strategies for Supporting Newcomers Experiencing Crises](#), as well as the IRC's eLearning course [De-escalation in Resettlement, Asylum, and Integration Settings](#).

## Make a Report

Once a crisis has passed, it's important that you report the situation to your supervisor or another member of your organization who can support you to debrief about the situation. In cases of known or suspected abuse, abandonment, neglect, or exploitation of a minor or vulnerable adult, you must make a mandated report.

For further guidance, see Switchboard's [Fundamentals of Mandatory Reporting: A Guide for Refugee Service Providers in the U.S.](#)

## Refer Clients to Additional Resources

A crisis can exacerbate existing needs and create new ones. Once the urgency of the situation has passed, work with the client to help them receive other services and assistance as needed. Remember to collect the client's [informed consent](#) and fill out a Release of Information to make referrals to other organizations.

## Co-develop Safety Plans

A **safety plan** is a personalized, structured plan created in collaboration with the client. Proactive safety planning will be especially important to clients with mental health issues, a known history of family violence, or other risk factors, as well as for unaccompanied children. For a safety plan to be effective, the client must be able to follow the plan, including when overwhelmed. This helps the client manage unsafe situations, crises, or difficult moments, as well as stay safe and avoid dangerous situations.

If a client does not already have a safety plan, always wait to create one until any urgent safety issues have resolved. **Safety planning should not be attempted in the middle of a crisis or emergency situation**, or when a client is in immediate danger, at high risk of harm to self or others, unable or unwilling to engage in the safety planning process, or unable or unwilling to maintain a safety plan after ending the call. **Follow your agency's safety policies if a client experiences any of the above situations.**

## Common Elements of Safety Plans

At a minimum, a safety plan should include important phone numbers for individuals and agencies available 24/7 if the affected person needs help, feels unsafe, or is in danger. This includes instructions on calling 9-1-1 if needed and appropriate. For additional elements, see the callout box below.

### Common Elements of Safety Plans

- **List of early warning signs** that something may be becoming unsafe.
- **Steps to prevent harm** or stay safe during a dangerous situation.
- **List of environmental safety changes** the client can make to minimize risk.
- **Coping strategies** the client can use to decrease distress and improve functioning.
- **List of supports** the client can rely on, including family, friends, community organizations, crisis hotlines, medical care, law enforcement, and more.
- **Action plan** that outlines specific steps the client can take to stay safe or react if things become unsafe or dangerous.

## Safety Plan Formats in Virtual Services

Safety plans should always use clients' preferred language. Visuals, such as phone icons or stop signs, can help strengthen the client's recall of information and make plans more effective. You can write down a client's safety plan and then email or text it to them for later reference. See *Resources*, below, for templates.

However, safety plans do not need to be written down. For clients who lack literacy skills or are concerned the plan could be discovered by an unsafe person, there are other formats to consider. The safety plan could be an audio file that the client can listen to, or it could consist of only images and phone numbers. Whatever format the plan takes, help the client decide how they will store it and whether additional protection is needed—such as a password for a document on a phone—to keep the client's plan secure and less likely to be accessed by an unsafe person.

## Help Clients Understand Virtual Safety

When clients receive services virtually, they are potentially exposed to threats not typical of in-person environments. For example, help clients understand when it's safe to share personal information and payment information during virtual interactions. Educate clients early and often about [red flags](#), such as being asked to pay taxes over the phone or via gift cards. Additionally, clients should know that the federal government will only communicate in writing and not ask for [payment](#) or a Social Security number by phone. You can share resources like Settle In's [How to Protect Yourself on Social Media](#) and [Common Signs of Identity Theft and What to Do if You're a Victim](#).

There is also the risk of someone impersonating a service provider to collect sensitive information from clients. If multiple virtual programs serve the client at the same time, consider using a private alphanumeric code that only verified providers and the client know. The client should know to ask virtual providers for the code and to only continue interactions with people who respond correctly. The code should **not** be an element of the client's personally identifiable information (PII), like an alien number.

Newcomer parents may not realize that virtual environments can also harm children. Offer information about [child safety online](#), [cyberbullying](#), and [online sexual abuse](#). If you work with children, you may want to add elements of [digital citizenship](#) to lesson plans.

## Conclusion

While virtual programs present unique safety concerns, it is possible to deliver safe and effective services virtually. Working to establish positive relationships with clients can help build trust, which can lead to client disclosure of safety concerns. Other elements that reduce risk or help address safety concerns include paying attention to nonverbal and environmental cues, de-escalation skills, and safety planning. By supporting your clients' understanding of virtual safety, you can reduce risk of harm.

## Resources

### Safety Planning

[Introduction to Safety Planning](#). This Switchboard guide introduces safety plans and the planning process.

[Low-Risk Safety Plan Template](#). This Switchboard safety plan template is appropriate for clients who face minimal risk but may still benefit from safety planning.

[Family Violence Safety Plan Template](#). Use this Switchboard template with clients experiencing or at risk of domestic and intimate partner violence.

[Suicidal Ideation Safety Plan Template](#). Use this Switchboard template with clients expressing thoughts about death or suicide who have no immediate plan or intent; these clients can use coping strategies and their support system to remain safe on their own.

### Client Protection

[Tips for Getting Started with Safeguarding and Protection](#). A Switchboard blog offering an overview of safeguarding and protection, with resources.

[What Works to Prevent and Respond to Intimate Partner Violence Among Refugees](#). A Switchboard evidence summary.

[Fundamentals of Mandatory Reporting: A Guide for Refugee Service Providers in the U.S.](#) A Switchboard information guide.

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