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How the remote delivery of immigration advice evolved during Covid

The digital and capacity implications of this change

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Contents

> *"Before the pandemic, providing online support or information sessions was unthinkable for us. It seemed far too challenging. The pandemic has obliged us to explore this avenue and we have become quite good at it.*[1]

1. Survey respondent

Methods of Increasing the Capacity of Immigration Advice[2] (MICIA), published in April 2020, identified nine methods through which the capacity, efficiency or accessibility of immigration advice could be improved. One of these was remote advice and casework (Method 5), defined in the report as: ***"The provision of immigration advice and the conduct of casework over the phone and/or through online methods without physical contact with the client."*** (p.34)

Pre Covid, it was clear that although organisations were offering telephone advice in a range of ways to regulate the flow of cases and make their advice more accessible, few of them were actively pursuing remote casework as an option. The MICIA research found one example of a project in Scotland actively exploring the delivery of remote casework for refugees with complex family reunion issues who had been sent to Scottish islands. However, other than that, remote casework seemed relatively underexplored, and some providers felt that remote casework for this client group was undesirable, impossible, or both. The report noted this might be an area for increased focus in the future.

In March 2020, the arrival of Covid and lockdown measures forced such a focus. Immigration advice providers previously reliant on face-to-face methods had to adapt so that they could support their clients remotely. As lockdown continued, they also had to consider how to reach new clients who were no longer coming to drop-ins or being identified through outreach or other traditional methods.

2. https://www.phf.org.uk/publications/methods-of-increasing-the-capacity-of-immigration-advice-provision/

About this briefing

This briefing updates the remote working methods being used by immigration advice providers, and summarises the benefits and challenges resulting from an increasingly digitised approach to client-facing work. It is intended to spark thinking and inform developments for people working in the immigration advice sector and for people funding it. Lessons for practitioners and funders are summarised in the final section.

The research questions addressed were:

- In what ways were immigration advice and casework conducted remotely during Covid restrictions and how did this evolve from previous practice?
- What have been the benefits of these new remote delivery methods in terms of capacity, efficiency and/or accessibility of the advice?
- What have been the challenges of setting up and running these remote delivery methods and how have organisations sought to overcome these?
- How has the digitisation agenda of the Ministry of Justice intersected with the development of these remote methods?
- Have attitudes to the delivery of remote advice and casework shifted during Covid restrictions and, if so, in what way?
- Which aspects of remote advice and casework might be maintained or developed when restrictions end, and in which circumstances?
- What have organisations learnt about 'digital resilience' and how can funders support them to develop this?
- What are the limits of delivering immigration advice and casework remotely, in terms of types of intervention or in terms of clients? How did organisations seek to overcome such limits during Covid restrictions, and what did they learn?
- What lessons does the evidence on remote advice and casework have for the infrastructure design and landscape of immigration advice provision?

Research was conducted between September 2021 and February 2022. Fieldwork comprised a document review, a sector-wide survey that gathered 61 detailed responses, and 23 in depth interviews with individuals based in a range of organisations across the UK.[3]

3. Fuller methodology and list of those interviewed at Appendix A.

Topline findings

- Recent technological advances have enabled remote working and a transition away from face-to-face advice: ***"I think if the pandemic had arrived five years earlier it would not have been possible to do the transition to delivering remotely with anything like the completeness."*** [4] In particular:
  - Smartphone availability has increased dramatically. Whilst in 2012-13, market penetration of smartphones was slight, by the advent of the pandemic most people with immigration advice needs used their mobile phones to connect (rather than laptops): ***"If Covid had happened five years ago the tech for clients wouldn't have been there. By the pandemic however we could ask many clients to have a video meeting and they'd say 'Yes, I've been doing this with my nan'."*** [5]
  - Available and free and/or relatively cheap platforms have proliferated compared to three years before the pandemic, when Microsoft Teams did not exist, Skype for Business was expensive and clunky and Zoom was relatively unknown.[6] Other options for audio and video conferencing adopted by commercial law firms were too expensive for most not-for-profit providers (a few used Cisco WebEx only). The evolution of free or affordable platforms in recent years has been key in enabling service transformation.
- Enabled in part by these contextual developments, there was widespread adaptation to remote methods of delivering advice and casework during Covid from providers ranging from specialists (such as law centres) to frontline agencies providing drop-in, lower-level advice and holistic support.
- Some organisations were more prepared for remote working than others because they had systems in place, such as cloud-based systems for case management, leased lines or VoIP[7] phone systems. In most cases, this was through luck rather than design.
- The transition to working remotely meant that providers reduced the numbers of clients they could see. However, as new remote systems were embedded, numbers could increase again, and sometimes remote methods meant that more clients could be seen in the longer run, particularly if their case was straightforward and the client was proficient in the use of basic technology. At other times, more complex cases could take considerably longer.
- There were various benefits of remote advice and casework for clients and for organisations, including saving time by not attending appointments and improved access for people unable to travel to physical drop-ins or appointments.
- Remote working has brought benefits in terms of expanded reach, with some projects being able to extend their offer to people across a much wider geographical area. There have also been benefits for organisations recruiting advisors (important given the sector-wide challenges in recruitment) with candidates applying to join organisations without having to relocate.

4. Fieldwork interview citation.
5. Fieldwork interview citation.
6. Zoom, launched in 2011, had been taking steps to integrate with other platforms but it was its transition to a public company in 2019 and then the boost afforded by the Covid pandemic, which prompted a drastic acceleration in its usage and accessibility.
7. VoIP (voice over Internet Protocol) is the transmission of voice and multimedia content over an internet connection, allowing users to make voice calls from computers, smartphone and other mobile devices. VoIP typically includes features such as call recording, custom caller ID or voicemail to email which cannot be found on common phone services.

- However, in the longer term, remote working methods were shown to be unsuitable for people where their situation and vulnerability meant that lack of in-person support and contact could expose them to even more risk: people who have been trafficked, people with significant mental health issues, people experiencing homelessness and women fleeing domestic violence, for example.
- Data security presents an ongoing challenge for the immigration advice sector. The core tension is to find an accessible interface that clients are able and prepared to use (such as WhatsApp and Facebook) whilst keeping data secure.
- As we emerge from the pandemic, most organisations are keeping some elements of advice and casework remote but in a more hybrid model, where higher-need clients can access advice in person (at least at the beginning of a case) and remote working is reserved for more straightforward cases or where the client prefers it.

How remote working evolved during Covid

Providers adapted in various ways to the Covid pandemic. Key shifts reported were::

- **Reviewing advice access methods.** Initially, providers tried to advise existing clients remotely. However, they soon realised that they had to evolve new methods of enabling clients to make contact who would previously have presented at drop-ins. Some providers adapted very quickly, for instance: Hackney Migrant Centre introduced a remote booking service where people seeking advice could ring between 10 and 12 on a Monday morning to book an appointment; Bristol Refugee Rights opened a helpline with a phone number that could record voice messages, texts and WhatsApp and could be directed to the phones of on-duty staff.
- **Outreach to people who were potentially in unsafe or difficult circumstances and needing advice.** Many people needing immigration advice found themselves in increased need because of lockdown measures (for instance, those who had previously been sofa-surfing with friends but who were asked to leave for fear of infection). They then became isolated because they could not make physical contact with services. Providers took various steps to try and address this. For instance, in Northern Ireland, immigration advice providers partnered with Advice Northern Ireland, which got funding for an 'advice van' to visit remote communities and deliver advice in Covid-safe conditions. Some organisations phoned existing clients to see if they needed support and to ask if they knew of anybody else in need of immigration advice. Some set up new referral arrangements with those still allowed to work face to face (for example, social workers, faith groups or community groups) to ensure that they got new referrals directed to them. In Stoke-on-Trent, Citizens Advice workers put posters in places where they felt people might go. Bristol Refugee Rights sent voice messages and texts to as many people as possible in several languages translated

by volunteer interpreters, and distributed translated leaflets through various city networks. Members of the Law Centres Network used a range of methods to reach people, including placing leaflets in foodbank parcels and adapting services to include support with Covid-specific issues (such as legal support with practical issues following bereavement).

- **Shifts in triage and assessment practice.** Various organisations seem to have recalibrated the initial triage and assessment function so that it is now done remotely and more efficiently, often by a single receptionist. This was necessary because of the need to take initial details online, which can prove time-consuming. It also saved time for specialist advisors to schedule phone calls with clients whose details had already been taken.
- **Variation in numbers of people helped.** As providers adapted, they reported that they were unable to see as many clients as before. As new ways of working became more established, however, they were able to see more clients and, in some cases, they could maintain larger caseloads when remote working. However, this was not universal: some providers noted that, particularly with less digitally capable clients, that remote casework could take longer.
- **Review of, and expenditure on, technology, subscriptions and equipment.** Most providers reported being office-based pre Covid and so the shift to home-based remote working sometimes required considerable adaptation. Providers with cloud-based case management systems found themselves better able to adapt than those without: *"We were already using a cloud-based database which was a real godsend – we were used to recording case notes on that about 10 months before the pandemic hit."*[8] Providers rapidly assessed their technology and bought new equipment (often with funding for Covid adaptations) for staff and volunteers, including mobiles, laptops and new telephone systems: *"Our telephone infrastructure was quite good but we were not the tiniest bit set up for home working. So we spent a huge amount of money for telephony for people to work at home and on laptops. We had to do that gradually – initially, people were asked to use their own phone, then we rolled out the new equipment."*[9] Some organisations also bought new programmes, for example Central England Law Centre installed WhatsApp for Business to facilitate conference calls, JustRight Scotland bought new Adobe and Zoom licences for workers, and Citizens' Rights Project bought professional membership of Zoom.
- **Data security.** Providers across the sector addressed the issue of data security. Some more specialist providers aware of potential security breaches through document transfer developed fully encrypted systems with back-up procedures in place. The key challenge was to maintain data security whilst ensuring an accessible interface with those needing immigration advice (most of whom preferred methods such as WhatsApp and Facebook Messenger). Other specialist providers tried relatively protected platforms (such as Jitsi) at first, but had to change them as clients were unable or reluctant to use them. In general, providers were pragmatic about data security: although Facebook Messenger was not advised as a secure option,[10] it was used if it was the only method

8. Fieldwork interview citation.
9. Fieldwork interview citation
10. Only 5 (out of 61) survey respondents said that they had used Facebook Messenger to liaise regularly with clients.

of contact understood by the client. Regarding casework, email and WhatsApp were the most common methods used to contact clients and get information. For video consultations (where clients could access them), Zoom was the preferred method followed by Microsoft Teams. Other, more specialist and encrypted methods were used less frequently, including: AttendAnywhere,[11] a platform used by the NHS to conduct remote consultations; the HSCNI (Health and Social Care Northern Ireland) secure email system[12] for correspondence with social services; We Transfer[13] to send and receive large documents; and Refernet[14] for the transfer of documents from external agencies.

- **Client-side support.** Providers had to quickly assess any barriers to reaching clients through various methods of contact and, if necessary, provide support. For instance, people without access to Wi-Fi might have limited data usage, or recent asylum seekers might have had their phones seized on arrival: *"We work with Roma people and clients did not have broadband in the house and very limited data, so doing a video call would have eaten into their data limits considerably."* [15] Providers supported clients in various ways, including: using free platforms with lower data security; conducting initial sections of interviews by video before switching to phone (to preserve the client's data); creating handouts and online tutorials that explained how to use the digital technology; and explaining how the new service worked on voicemail, text and on their website.[16] One provider offered a phone service where clients could leave voicemails in their own language. Voice messages would be translated by volunteer translators and then assessed prior to phoning the client back, again using interpreters.

Key benefits

Client benefits and outcomes

A range of **accessibility benefits** for clients were identified in relation to remote advice and casework service:

- **More 'democratic' in terms of accessibility**. Clients who previously had to travel to and sometimes queue at busy drop-ins to access advice no longer had to do this, instead accessing appointments by phone. This gave some more vulnerable clients – particularly disabled people or women with young children – a more equal chance of being taken on as clients.
- **No travel time and cost for clients**. One provider described how, prior to lockdown, one pregnant client had walked for two hours across the city to access their drop-in advice session. Remote methods also saved the hidden wasted time of clients *"trekking into the city centre only to find that they can't be helped that day. At least with remote methods they are at home, just ringing us."* [17] Providers noted how some clients were pleased to be able to access advice online and appreciated the cost savings: *"If you have a non-working Aspen*[18] *card and you don't have the option of phoning, you'd have to walk five miles with a buggy. So that's a definite advantage."* [19] Nevertheless, some clients continued to prefer, or needed, face-to-face advice.

11. https://www.attendanywhere.com
12. http://online.hscni.net
13. https://wetransfer.com
14. https://www.refernet.co.uk
15. Fieldwork interview citation
16. For instance: a) Migrant Centre Northern Ireland created handouts clearly explaining stages of completing the EUSS application, down to how to position the phone and what clients should be seeing on the device when they took a photo of themselves; b) Nottingham and Nottinghamshire Refugee Forum sent text messages and social media adverts explaining how the service worked and how to access it.
17. Survey respondent.
18. The Asylum Support Enablement Card (ASPEN) was rolled out nationally in May 2017 and is a green Visa pre-paid card onto which subsistence support is automatically allocated.
19. Fieldwork interview citation.

- **Wider geographic reach.** Some services covered a wider geographic area by delivering remote advice and casework. Local providers noticed that they were getting clients from a wider area, and that clients did not seem to 'jump city' in seeking service support: *"We opened our reception and advice lines up and, technically, people could have phoned us from anywhere, I guess, but that didn't happen – they were all from London."* [20] One national project, KIND UK, reported that going fully online enabled them to offer advice and casework outside previous geographical limitations imposed by a pre-Covid model that required two or three face-to-face consultations. This has significantly extended their offer to clients outside the West Midlands, Manchester, London, Glasgow and Edinburgh, where current partners are based.
- **Reduced anxiety and stress.** Clients who find the trip to and from advice providers challenging and/or intimidating prefer to talk with advisors from the comfort of their own space. Similarly, clients who are neuro-diverse have reported that they can prefer meeting online to meeting face to face. In addition, some providers have tested online appeal hearings: *"Though we have only hosted one live appeal to date online, it has showed the possibilities for this to reduce costs and anxieties for our clients."* [21]

Other benefits for clients included:

- **Devices.** The drive to get technical devices to children of school age during Covid meant that some clients gained access to free data, or devices they could use for getting advice. Where clients were without means to contact their advisor, providers sometimes sourced cheap mobile phones or tablets to enable them to keep in touch or even topped up mobile phones in some instances out of emergency funds.
- **Skills and awareness.** Initiatives run by advice providers to ensure that clients could continue accessing their service included the creation of information briefings, telephone support and online training. Such initiatives could help build awareness and skills. Cardinal Hume Centre took migrant families to the pantomime (after lockdown had eased) where audience members were asked to show their NHS passport on their phone. This meant some families had to be shown how to download and then use the NHS App, which was eye-opening and helpful, some clients reported.
- **Technical improvements to help clients.** Some client-focused technological developments have helped clients and advisors get information organised more efficiently. For instance, the Refugee Rights Hub (Yorkshire and Humber) developed an app for its family reunion clients to help them download and use Clio for Clients,[22] which makes it far easier to scan and convert documents into a PDF format and send to their advisor. It also enables the 60 per cent of clients reported as being able to effectively use it to keep up to date on their case. Hackney Migrant Centre got funding for internet dongles to enable clients to attend English classes and keep connected.
- **Traditional methods of client support and donations were reviewed.** There was a range of secondary benefits from providers reviewing their standard 'in person' practices. For instance, some frontline providers had physical foodbanks and donations that clients

20. Fieldwork interview citation.
21. Survey respondent.
22. https://www.clio.com/uk/features/client-portal/

could use at drop-in sessions. But, with such sessions not possible, this support evolved into providing vouchers, which some clients preferred: *"It forced us to review how we had been giving those donations and I think, from feedback, clients preferred having the agency to go and buy things themselves. We also did that with Christmas presents, which, rather than being bought directly, were given as vouchers: again, parents then had the option of making the decision themselves."* [23]

Organisational benefits and efficiencies

There were many benefits in making the transition to remote working at an organisational level, including:

- **Efficiencies around team working.** It was easier and more time-efficient for many organisations to hold team meetings online, with time saved on delays caused by lateness or non-attendance generally. Some noted that members of staff who were technically ill (e.g. with Covid) but with mild symptoms still participated in such meetings when they could. Many organisations are continuing with virtual meetings even after reopening their offices.
- **Internal training.** Training that previously would have been in person could migrate online for staff and volunteers, enabling more people to attend 'live', and providing the opportunity to record sessions for those unable to attend: *"Delivering a lot of our internal training through Zoom on issues such as safeguarding meant we could record those sessions – it's not I guess as good as attending a physical session, but in terms of capacity it's quite useful."* [24]
- **Refreshed engagement with volunteers and members.** One provider noted that their Annual General Meeting had been much better attended when held online. Generally, engagement and support for volunteers came under the spotlight as working shifted to home and new systems were implemented to support them.
- **Greater control of time.** Time is not lost to the same extent through missed client appointments, and advisors are not so prone to interruptions caused by emergencies: *"Clients cannot just walk in during someone else's appointment and expect to be seen. As a small organisation previously working in a church, that used to happen a lot and was difficult to manage."* [25] It was also noted that not having drop-ins and interruptions meant advisors could focus on complex casework, although doing such casework remotely came with its own challenges, such as finding it harder to engender trust (and thus full and frank disclosure) at a distance.
- **Reviewing need for physical office space.** As a result of the pandemic, some organisations are reassessing their need for office space and are investigating downsizing, thus potentially saving core costs as a result.
- **OISC[26] accreditation possible online.** During Covid, advisors did not have to travel to London to take their exams, which for people living far away (e.g. Northern Ireland) was a huge saving in time.

23. Fieldwork interview citation.
24. Fieldwork interview citation.
25. Survey respondent.
26. Office of the Immigration Services Commissioner (OISC) is the regulator of immigration advice in the UK and is responsible for assessing and accrediting advisors into its Regulatory Scheme at three levels of competence (Level 1 – Level 3).

- **Recruiting staff from a wider catchment area.** The possibility of working remotely has meant that organisations can recruit from a wider geographic area. This has enabled the pool of potential candidates to be expanded for some key posts. For instance, two of the Law Centres Network's digital team delivered support from Australia. The importance of this was highlighted in relation to specialist advisor roles where recruitment continues to be extremely challenging, with some London-based providers advertising four or five times to attract candidates with suitable qualifications and experience.
- **Providing advice and support to people in a wider catchment area.** Already noted as a benefit for clients, there are also organisational benefits to promoting services across a wider catchment area: for instance, Migrant Centre Northern Ireland held a specialist briefing session on the EUSS [27] rule change for Northern Ireland nationals on 24 August 2020 [28] at which nobody from the UK was present: *"We had people sitting on a cruise ship outside Brazil, people in Cuba and Canada, kids being put to bed in Australia – people from all over. They were so grateful that it was happening online as they said, otherwise, they wouldn't have had access to the advice, but it was great for us as well."* [29]
- **Remote methods of working and new technologies enabling time efficiencies**. Most providers felt that moving to a remote advice and casework model saved them time: *"We have been delighted that we were able to still conduct the same volume of work – in fact we conducted an even greater amount of work in this period given the high demand and the fact that the Home Office has had even greater difficulty than normal functioning effectively."* The general trend for getting to grips with remote advice and casework was that, initially, fewer clients were seen, but once new systems were established or new technologies were adopted, work could be done more efficiently, particularly with some client groups. Interesting time-saving evolutions include:
  - Voices in Exile have developed an Immigration Toolkit.[31] Developed and trialled with clients, this web-based resource guides people through the evidential requirements of various applications. It helps clients organise the documents they need in the right format for their advisor. The toolkit empowers users and saves advisors the time they would normally spend on explaining and sorting the 'carrier bags of papers' so typical of immigration cases.
  - The Law Centres Network is developing a system called Enquiry Desk, which logs data from texts, phones, emails, etc. in a single person enquiry, connecting this with client record systems. The system is still in test phase (and not immigration specific), but the early adopters of this system are already seeing time savings.
  - Several organisations have either trained existing staff or employed new staff to act as the initial point of reception, gathering essential information, walking the client through the preliminary terms and conditions and consents, and providing an overview of the process to come. This means that time-consuming elements of getting signatures and setting the scene are completed before they have their first session with the specialist advisor.

27. European Union Settlement Scheme aimed to secure the status of people living in the UK under EU rights after the UK left the EU. Eligible individuals had to apply to the scheme in order to be granted settled or pre-settled status.
28. On 24 August 2020, a rule change meant that British citizens born in Northern Ireland were able to sponsor non-EU family members to apply for the EUSS. https://borderpeople.info/a-z/eu-settlement-scheme.html
29. Fieldwork interview citation.
30. Survey respondent.
31. https://www.voicesinexile.org/immigration-toolkit/

Sectoral and strategic benefits

- **Topic-specialist services available to wider catchment area**. Organisations have been able to make their specialisms available across a wider geographic area. For instance, Project 17 [32] has been able to deliver services in parts of the country that previously did not have a specialist NRPF (No Recourse to Public Funds) advocacy presence, and Refugee Rights Hub [33] at Sheffield Hallam has been able to incorporate new partners from other areas into its provision mix.

- **Advice partnerships easier to develop between distanced providers**. KIND UK [34] has been able to extend its partnership model with private sector firms providing pro bono (free) advice so that the firms, the caseworkers and the clients no longer need to be in the same place. This not only extends the service to more clients but also makes the model more flexible with, for example, caseworkers in Glasgow partnering with private sector firms in London to support a client in the East Midlands, or St Augustine's Centre in Halifax partnering with PAFRAS [35] in Leeds and the Refugee Rights Hub at Sheffield Hallam University to deliver family reunion advice. It was noted that such collaboration reflects increased acceptance of various remote platforms for working: *"Whereas before with private law firms in particular there was much more of an insistence on using their internal platforms, the pandemic has smoothed quite a lot of that out as a) everybody is using such platforms all the time now and b) acceptance of using other people's tools has gone up a bit."* [36]

- **Prompt to review remote working methods**. *"People have talked about the pandemic being a blessing in disguise for getting people to adopt ways of digital working which are a little bit more efficient."* [37] By reviewing their systems for more efficient collection, storage and transfer of data, some organisations have evolved their awareness and practices more than they ever would have before Covid: *"Remote working has led to a complete reorganisation of our working model, which means we have better oversight of our activity and a better means of tracking clients' progression. We don't intend to return to the same ad hoc drop-in model from before."* [38]

- **Second-tier support and capacity building enhanced**. Support to other providers was delivered remotely pre Covid through, for instance, professional helplines like that offered by Rights of Women. More formal and structured support, particularly around the supervision of those training for OISC accreditation, was also shown to be possible. This was not entirely new (Refugee Action had been supervising other organisations remotely pre Covid), but acceptance that this was possible grew as online working became the norm. The implications for the sector are significant, with specialist providers able to supervise advisors across wide geographical areas.

- **Increased networking and training opportunities**. The pandemic has been transformative for many advisors (particularly those in more remote areas) in terms of their participation in regional and national discussion groups and networks. This has improved not only people's sense of being up to date and informed but also their ability to influence and provide relevant updates from their area: *"Having networking meetings with Refugee Action or with ILPA [Immigration Law Practitioners' Association] – that's fantastic. I would never in a million years have been able to attend those when in person, now I can."* [39] Online training opportunities have also increased – Refugee Action has increased its FIAP (Frontline Immigration Advice Project) training, for instance – and, because of the pandemic, there is more widespread acceptance of online training and learning amongst advisors.

32. https://www.project17.org.uk
33. https://refugeerightshub.shu.ac.uk
34. https://www.kidsinneedofdefense.org.uk
35. https://pafras.org.uk
36. Fieldwork interview citation.
37. Fieldwork interview citation.
38. Survey respondent.
39. Fieldwork interview citation.

Key challenges and responses from the sector

The sector faced multiple challenges, which providers mitigated in various ways. The most common challenge identified by those responding to the survey (80 per cent of 61 responses) and those interviewed was clients' lack of access to digital technology including in particular lack of access to Wi-Fi and data.

> *"It's daunting making a call when your English is zero – so this was an alternative for them.*[42]

> *"Even if they didn't read or understand English, they were still looking at the screen and what was happening.*[45]

> *"No matter how many times I explained, he was struggling. At that point I arranged for him to come in as I felt he needed to meet me for reassurance.*[46]

Nature of challenge	Observations on and responses to this challenge
Practical client barriers: lack of devices, lack of data, no internet This can happen because, for instance, clients' mobile phones were removed on arrival in emergency hotels, because they had no Wi-Fi access or because their phones were old, broken or lacked connectivity.	• Generally, providers were surprised that most individuals could access a basic smartphone. For the EUSS scheme, for example, it was noted that even people in their 90s were accessing advice remotely using their children's devices. • People overcame their lack of data in various ways, including standing outside coffee shops or advisors' offices to connect to free Wi-Fi. • Some providers set up confidential spaces in which clients could attend on their own to access equipment: Greater Manchester Immigration Aid Unit (GMIAU) set up a webcam in an interview room, and Citizens Advice Newport had 'Zoom rooms' where clients could speak to advisors from separate rooms. • Keeping phone cameras switched off when talking to clients to preserve data. • Setting up drop-off points for documents, or in some cases visiting people's homes to receive documents, photograph them, and give them back (complying with Covid rules). • Working with partners (e.g. social services, frontline community groups) who were still in physical contact with clients to connect them to an advisor. • Raising funds or credit for smartphones and distributing them. For instance, Tesco donated smartphones to Bristol Refugee Rights, which distributed them to priority clients.
Lack of client skills, confidence and language or literacy to effectively use technology Clients have varying technical skills. Some are digitally unaware, others are not acquainted with various platforms and apps and others rely on family members (often children) to make any digital contact needed. For many, the problem of access is exacerbated by lack of English language skills, illiteracy, or both.	• Creating 'tech support' roles (staff or volunteer) responsible for distributing devices, creating clear instructions on using different types of technology or training clients to enable technical access (e.g. Bristol Refugee Rights had a 'Tech Project'). • Offering more than one platform for people to make contact. Although providers preferred more encrypted methods for casework, many acknowledged the importance of giving clients more options initially, accepting voice message, texts, WhatsApp, Facebook Messenger and a range of other community-specific apps.[40] • Relying on partner organisations to connect and guide clients through the process. For instance, care workers helped EU citizens in care homes make applications through the EUSS. Where literacy and language were issues, this may have been the only way to connect. • NNRF[41] set up a separate mobile line where clients could leave a request for help in any language. They publicised the service through posters printed in different languages, as well as on a social media board outside their offices. A team of interpreters listened to messages, called back (in the client's language) to get basic information and set up a preliminary appointment: *"It's daunting making a call when your English is zero – so this was an alternative for them."* [42] • Publicity that included images was, for some, vital. In their study of digital exclusion,[43] SNSCAB [44] include a case study of a woman who could not read or write and did not know how to contact the office. She visited her sister, saw a leaflet with the logo on it and then rang the national phone number. Such awareness spurred SNSCAB and other organisations to distribute basic information with their logo and pictures through multiple networks, including in foodbank parcels. • Ultimately, most providers maintained some capacity to reach out physically to clients who were struggling with remote communication only. This included home visits where providers talked to clients through doors, or clients coming in to the office and speaking through screens.

40. For example WeChat, the Chinese version of WhatsApp, used by some Malaysian clients in Sheffield.
41. Nottingham and Nottinghamshire Refugee Forum.
42. Fieldwork interview citation.
43. *Locked Out: Barriers to Remote Services by Sophia Hayat Taha and Jude Hawes for Refugee*, Asylum and Migration Support Service, Staffordshire North and Stoke on Trent (2021). This publication is not currently available online.
44. Stoke-on-Trent and North Staffordshire Citizens Advice Bureau.

Nature of challenge	Observations on and responses to this challenge
Mental, physical and safeguarding barriers for clients Many people with immigration advice needs are traumatised, sometimes by the immigration and asylum process itself. This can make it hard to focus, and can be exacerbated when trying to communicate remotely. Human communication relies on body language to a great extent, which is difficult to replace, even with video calling. In addition, those facing dangerous situations – domestic violence or trafficking, for instance – may find it difficult to identify a safe and confidential place from which to speak. Safeguarding concerns in such situations are real.	• Being prepared to explain the process several times and then check for comprehension may be particularly important. • Providers are increasingly aware of the need to manage communications with those facing potentially dangerous situations. Asking questions can help to some degree (for instance, asking if they are alone in a room) or watching body language (eyes flicking towards another person, for instance), but it can still be difficult to be sure. • JustRight Scotland works predominantly with partners to ensure a measure of protection for such clients, identifying when to end an interview and require that the next communication be in person. • Learning how to make a video conference user-friendly and limit distractions is another method of lowering anxiety, including how to position one's face, using neutral backgrounds and allowing silence in the session (talking remotely can prompt a desire to 'fill silence', which may feel pressurising). It may also be possible to prompt a client to find a quiet space, however it is difficult to control where the client will be, and their background may be full of distractions. • Having private rooms with webcams can enable clients to communicate remotely without safeguarding concerns. • For clients with severe mental trauma or safeguarding issues, there may be no option but to see them in person to progress their case.
Engendering trust Trust is vital to enable full disclosure of pertinent facts, as well as to enable clients to feel safe and confident with their advisor. Building such trust remotely is difficult: often, individuals need to relate upsetting details over the phone with no option for the advisor to provide support, offer tissues or show sympathy. It is also more difficult to assess whether people are telling the truth: hesitations that may indicate there is 'something more' are more difficult to spot over a shaky internet connection. Trust is also undermined by the process itself, which keeps people hanging on for months and years for a decision.	• Structuring appointments so that they allow for impromptu questioning or 'following of leads' is difficult, but some advisors spoke about trying to arrange this. • Conducting appointments where the client's face is visible was felt to be really important: without physical clues, even online, it becomes even harder to assess comprehension and disclosure. • Allowing time between questions and asking open questions can help. • GMIAU encourages screen sharing to engage the client: "*Even if they didn't read or understand English, they were still looking at the screen and what was happening.*" [45] • Spotting signs of unease, upset and incomprehension is key. One advisor noted that a client had asked for an explanation of the process every time they spoke: *"No matter how many times I explained, he was struggling. At that point I arranged for him to come in as I felt he needed to meet me for reassurance."* [46] • If possible, many felt it was beneficial to meet the client at least once to build trust and *"see the whites of their eyes"*. . [47]

45. Fieldwork interview citation.
46. Fieldwork interview citation.
47. Fieldwork interview citation.

Nature of challenge	Observations on and responses to this challenge
Document signing and authorisation Getting documents signed can be challenging, particularly if the client is not digitally savvy. Some providers have had to post documents to clients so that their signatures satisfy Home Office requirements, which can cause substantial delay. The Legal Aid Agency was reportedly more flexible around evidential requirements and signatures, but all providers had to adapt their practice to meet guidance current at the time.	• Migrant Centre Northern Ireland supported people with EUSS applications where they needed to verify an email address. Where clients did not have one, they set one up for them: "*But this was difficult if clients could not read them or access them – we were sending information to authorise their account on their behalf.*"[48] • Refugee Rights Hub introduced DocuSign to enable clients to give consent to act, for example. Family reunion clients were largely able to use this system as they were used to being in remote connection with their family. DocuSign is relatively simple, involving a click on the document. Nevertheless, coaching sessions via screen sharing were sometimes necessary in which an interpreter would take clients through the process (*"Now click on the yellow button"*). This involved an extensive outlay in interpreter fees. • Partners, such as the British Red Cross, supported clients' signing of documents for specialist advisors, particularly where there was a language barrier. • The Legal Aid Agency agreed during Covid to accept unsigned documents provided there was confirmation of some kind (e.g. in an email) that the client agreed with the contents of the submitted form.

> *"But this was difficult if clients could not read them or access them – we were sending information to authorise their account on their behalf.*[48]

48. Fieldwork interview citation.

Nature of challenge	Observations on and responses to this challenge
Getting documentary evidence Multiple documents are needed for immigration applications, including completed Home Office forms (some of which are now online), ID documents, bank statements, proof of residence, etc. Sometimes, evidence is required going back years to show people meet the criteria for a scheme: the EUSS, for instance, could require documents going back over five years. Obtaining these documents in readable formats which could be transmitted online to support applications with sometimes strict criteria was vital but difficult. Pre Covid, such documents were taken to drop-ins and advice sessions in unsorted carrier bags, so dealing with *"electronic carrier bags"* [49] became one of the more challenging areas for those delivering remote casework.	• GMIAU drafted a policy early in the pandemic that explained to advisors the pros and cons of various ways of getting documents to clients. • Providers mainly encouraged clients to take photos of pages and send them using WhatsApp, however this could result in documents being received in random order (months of bank statements, for instance, or long court determinations), which then had to be sorted. Additionally, problems arose with submissions in unreadable formats (corrupted files or images or photos with irrelevant meta data). These problems could be invisible to the client but had to be dealt with by the provider. • Some clients were unable to email documents, but many providers discouraged use of email anyway for fear of emails going astray or addresses being mistyped: *"Email is a bit of a hazard – you type in an address and others pop up. Our protocol is that all advisors should have that 10-second delay set up on Outlook which encourages you to double-check and retrieve if necessary."* [50] • Some providers trained volunteer teams to receive and sort such documentation: *"Volunteers put it on another platform for advisors, uploading it to the casework system. We trained them to use a pdf editor tool to get it ready so advisor time was not eaten into – it worked well."* [51] • In some instances, clients could not take photos, in which case physical visits were arranged: *"We'd meet them outside their homes, pick up the documents and do the photographing. It meant that a visit which might have taken 20 minutes could take two hours or more."* [52] • Some providers created drop-off points for documents. • Once lockdown restrictions eased, organisations identified a role for 'document support' at offices: some providers deployed volunteers to help clients scan and organise documents, and others created new posts, such as the Cardinal Hume Centre, which has employed a legal admin assistant to come in to the centre each day to deal with clients' documents. • Spelling out to clients clearly what is needed, sometimes in translated and simple guides, has become even more important with the move to remote casework: *"You have to be very specific, otherwise you get 100s of pages of stuff you don't need, or papers in forms you can't see or use."* [53] • Voices in Exile's Immigration Toolkit [54] was designed as a web-based platform for clients to find out what documents they need, in what format, and then upload them. This was to avoid repeating the lists and to save time for the advisors. The toolkit is reported to work well when the client has a key worker to support them but less well with unsupported clients and those who lack digital and/or linguistic resources and skills. Therefore, it has streamlined document gathering to some extent. • 'Shrinking' documents was necessary for some digital submissions. For instance, the EUSS scheme only allowed the uploading of 10 documents, each with a limit of 10 megabytes, so providers needed the capacity to shrink, for example, six years of bank statements. • Exporting message content (e.g. WhatsApp) in a way that the courts and regulators would accept was flagged. Ideally, internal case management systems will allow for messages sent through platforms to be machine readable and therefore incorporated into case notes and documents for each client.

49. Fieldwork interview citation.
50. Fieldwork interview citation.
51. Fieldwork interview citation.
52. Fieldwork interview citation.
53. Fieldwork interview citation.
54. https://www.voicesinexile.org/immigration-toolkit/

Nature of challenge	Observations on and responses to this challenge
Inadequate equipment or systems Moving to remote advice and casework highlighted the need for appropriate devices and systems to enable home working and ensure data security. It also highlighted the need for good phone systems and cloud-based case management systems that were accessible from multiple points. Without these, providers struggled to deal with decentralised working methods and maintain contact with clients.	• Providers with cloud-based case management systems were mindful of how much easier this had made the transition to remote advice and casework. • Case management systems that allowed integration of platforms were extremely useful but rare. Otherwise, less sophisticated ways of incorporating client communications were needed, such as taking screenshots of WhatsApp conversations, converting them and uploading them into case files. • Some desktops and laptops did not have audio or video facilities, so these needed to be added on. • Poor Wi-Fi and internal firewalls caused some problems for organisations receiving multiple external log-ins simultaneously. Leasing phone lines is one way around this, albeit a cost outlay. • Software that enabled screen sharing, document conversions and shrinking was important. • Research shows that poor sound quality is commonly 'put up with' and is a major barrier to effective online communication. Some providers invested in headsets and good microphones to maximise comprehension. Not being able to hear clients properly (or vice versa) can seriously undermine communications already strained by remoteness and language barriers. • Few providers have staff dedicated to tech support and this lack was felt more acutely during the pandemic. This was not only to problem-solve but also to audit, guide decisions, spot improvements (which non-tech people might not recognise), save money and assist with establishing systems and monitoring procedures around data security, etc. • Laptops and devices for staff and volunteers to assist home working and ensure better data security had to be bought or acquired through donation. However, difficulties still arose with some donated machines being second-hand and 'basic'. • Some office phone systems (e.g. landlines) proved inadequate for fielding calls: *"I'm trying to replace our IP [Internet Protocol] phone system for which we have a contract to Teams but it's hard – there's an ingrained path dependency and no time to test. As a result our phone system is dire."* [55] • New phone answering systems were set up where possible, for instance diverting calls from mainline to a 'hunt group' of staff and volunteers able to receive incoming calls on rotas; opening a new helpline (mobile) that could receive calls and forward them 24/7; getting dedicated work mobiles for staff and volunteers where previously personal phones, or none, were used: *"We didn't have money to upgrade it so the only thing we could do was call forwarding basically and voicemail."* [56]

55. Fieldwork interview citation.
56. Fieldwork interview citation.

Nature of challenge	Observations on and responses to this challenge
Remote working challenging for some staff and volunteers Transitioning to home working was not easy for all, with some people having inadequate conditions or equipment (no privacy, bad Wi-Fi, no dedicated phone, constant interruptions). As well as these practical considerations, wellbeing issues were raised when formal and informal office-based support was lacking. Volunteers in particular could be resistant to working via phone and computer only; some left as a result. Some of those who stayed needed intensive training and ongoing support to work effectively.	• In-person methods of working with volunteers had to be entirely rethought, especially where they assessed clients and had easy access to 'quick questions' to staff: *"We had volunteers who didn't like using computers, or were used to using a computer at the drop-in with a lot of people asking questions, which is very different from sitting on the phone all day purely answering questions on your own."* [57] • Older volunteers particularly could prove reluctant to engage digitally. This was partly because they had volunteered to have contact with people and partly because remote assessment could be hard. Continuing to do previous tasks by phone only was possible but much more time-consuming: *"Now they make a phone call with clients, note areas to check, make a phone call with supervisor – it takes much longer."* [58] • Training and support were provided for volunteer teams on how to work remotely, the platforms used and new procedures in place. This needed to be set up accessibly and allow for constant check-backs: *"We ran a lot of training sessions on Zoom and we had a drop-in Zoom on a Wednesday where volunteers could just come and ask about tech issues."* [59] • New roles were found for volunteers who did not want to work online, including receiving and copying documents, checking clients' wellbeing (phone call, distanced visits) and distributing leaflets and flyers. • Delivering remote advice at home could be emotionally draining for staff and volunteers with no place to relax after calls. Providers set up online debrief sessions and aimed to make them optional and informal to avoid them feeling like 'just more screen time'. Some set up 'teatime drop-in sessions' (or equivalent) where chat only (i.e. video switched off) was permitted to maintain a sense of being connected to a wider group of people who understood and cared: *"I was really concerned about volunteer wellbeing – being on the phone listening to tragic things and then being on your own in a room is not okay."* [60] • Inability to refer cases onwards was one of the major reasons why providers (particularly those previously providing drop-ins) reduced client numbers: *"We used to take 20 clients a week but have gone down to 6 because, despite increased staff capacity, the issues people are facing are a lot more complex and there are a lot fewer options to progress cases."* [61] • Delays at the Home Office have got worse, meaning providers have been left 'holding' clients for even longer in sometimes desperate circumstances. This has placed more strain on clients and advisors. • There were some benefits to changing services: the 'Everyone In' scheme made it easier to contact people who had been hard to reach in the hotels they occupied during this time and start cases on their behalf. This has now stopped.

57. Fieldwork interview citation.
58. Fieldwork interview citation.
59. Fieldwork interview citation.
60. Fieldwork interview citation.
60. Fieldwork interview citation.

Nature of challenge	Observations on and responses to this challenge
Resistance and confusion inhibiting change Creating and embedding new systems of working is difficult at any time but particularly at a distance. Providers encountered a range of challenges including client barriers, lack of clear pathways to follow in terms of online working (in particular with data security issues) and resistance to change generally	• Providers used to client-centred ways of working found it hard to adapt to using solely remote methods, particularly as they were aware that this sometimes imposed even greater stress on those they were trying to help. • Likewise, advisors reported their frustration at not being able to pick up on body language and other signals when working remotely, which could be so important in assessing and supporting clients: *"It was difficult to know if the client hesitated because they wanted to tell you something, or just due to a dodgy connection."* [62] • Specialist advisors – notably lawyers – can be resistant to change: *"Lawyers engage in a lot of systems and processes and are creatures of habit, so one of the big challenges I faced early days was getting people to do things one way rather than another."* [63] • Assessing and controlling the time needed for tasks was difficult. Although phone and online appointments could save time, it was difficult to predict the effect that poor connectivity or external interruptions would have on appointment durations. • Some providers noted that young clients in particular felt less comfortable talking on the phone, being more used to WhatsApp messages or face to face: *"Young clients can be really reluctant to speak on the phone, particularly at pre-arranged times. It's not the way their mind works."* [64] • Data security concerns were pushed to the fore, with providers often trying to navigate poorly-understood lack of encryption. Providers preferred not to use WhatsApp, Zoom and others but nonetheless had to choose between pragmatic options and total data security: *"It's a balance – I tried to get my clients to use Signal to begin with but some just couldn't get it so had to revert to WhatsApp."* [65]

62. Fieldwork interview citation.
63. Fieldwork interview citation (lawyer).
64. Fieldwork interview citation.
65. Fieldwork interview citation.

How the digitisation agenda affected remote working

The Home Office and the Ministry of Justice have been moving application forms and court hearing processes online as part of their modernisation and digitisation agenda. This was happening amidst some flagged concerns[66] pre Covid. Moving online has brought benefits as well as challenges for advisors and clients.

Benefits of being able to fill in applications and progress appeals online include:

- Some feel that remote working has been *"only possible really because the Home Office had moved to online forms. It would have been really difficult without that."* [67]
- A move from requiring original (paper) documents and original client signatures makes it easier to assemble evidence: *"Now almost all of the documents we need can be copies. The client can take a photo on their phone and email or WhatsApp it to the firm and that's enough. Most of the time the client can do it themselves and it is much better for them being able to keep hold of those documents."* [68]
- If an advisor does not have the capacity to take on a client, they are able in some cases to direct them to the form, get them to fill that in and send it through for checking: *"They can send the PDF and I can check that form – so in that sense they are quite helpful. But generally, they [online forms] are a pain."* [69]
- Moving tribunals and appeal court hearings online can be less stressful for clients.

Challenges of digitisation include:

- Providers were given little if any warning about the transition from paper to online forms: *"It happened prior to the pandemic for our forms, I think, and the Home Office didn't warn anybody. I had been allocating cases to lawyers and then had to say 'Hold on, everything has changed' when they were asking me how the new online forms worked. I had to put everything on hold and figure it out."* [70]
- Forms do not enable advisors to mark questions as 'non-applicable' (as was the case with paper forms), as all questions require an answer: *"Some of the questions are completely irrelevant and a lot of the time I'm just writing something to get to the next bit."* [71] Furthermore, some questions require precise dates – which clients cannot remember – but without a day, month and year, the advisor cannot proceed*:* *"Some clients do not remember the day they arrived in a lorry in the UK. On the application form they want the day, month and year, so you have to guess, knowing that it is inaccurate but it doesn't allow you to say that."* [72]
- There is no manual that explains how the new online system works. From an end user point of view (i.e. advisors, or in some cases clients), this can be a problem, as it is difficult to predict what is coming up or explain to clients what will be needed. Additionally, forms can and do change without warning and for no apparent reason: *"I started to keeping a list of the questions which would be asked. But then I realised that the*

66. For example, https://justice.org.uk/our-work/assisted-digital/
67. Fieldwork interview citation.
68. Fieldwork interview citation.
69. Fieldwork interview citation.
70. Fieldwork interview citation.
71. Fieldwork interview citation.
72. Fieldwork interview citation.

application form would change overnight – so a question they asked on Monday they would not ask on Tuesday. Didn't happen that often but it happened enough for me to notice." [73]

- UK government stakeholders are keen to use or contract their own platforms, which do not necessarily interface well with those used by advisors or clients. For instance, remote hearings may require clients to use an unfamiliar platform rather than a more common platform such as Zoom. Partner websites (such as VFS.Global[74] used by those making family reunion applications) can crash, making booking visa application appointments overseas difficult.
- The Home Office resolution centre has no provision for interpretation, meaning that problems encountered need to be explained in English. This was raised in relation to EUSS, for instance, where clients completing their own application forms could not resolve issues without recourse to their advisors.
- If clients have received inadequate, paid-for advice before arriving at a specialist provider, their appeal might have been started and a private portal created through which they have been sending documents. This is not then accessible: *"These private reps take money and then often offer poor advice, so they come to us, we get them a legal aid solicitor, and now it is online they don't have access to the online portal."* [75]
- MyHMCTS[76] is the online case management tool managed by HM Courts and Tribunals through which immigration and asylum appeals can be progressed. One major problem identified has been that – for various reasons, including poor Wi-Fi – litigants can struggle to connect with their representatives during hearings.

Limitations of remote advice and casework

- **The transition to remote working has enabled some providers to work with more clients**. This is particularly true for providers where the issue is relatively straightforward (e.g. children and young people registering as British citizens, or those seeking family reunion) and clients are likely to be motivated and able to understand the process.

> *"For us there was nothing dramatic about the move and because a lot of our work was citizenship, families are quite far along in their life in the UK. Generally there are not the same language issues, and pretty well everybody has a smartphone.*[77]

73. Fieldwork interview citation.
74. VFS Global is an international visa outsourcing specialist for governments and diplomatic missions: https://www.vfsglobal.com/
75. Fieldwork interview citation.
76. https://www.gov.uk/guidance/myhmcts-online-case-management-for-legal-professionals
77. Fieldwork interview citation.

> *"Our clients are very motivated to be reunited with their family members so although their cases can be complex and difficult, they are engaged. They are also used to using online means of communication to keep in touch with their families. So though there was a bit of resistance about moving to remote working from advisors, that view has shifted as it has shown we can reach more clients.*[78]

- However, **elsewhere, remote casework has resulted in numbers dropping**, particularly for providers supporting more vulnerable clients. This was particularly evident in providers' 'frontline' services (drop-ins, holistic support centres) where numbers supported sometimes had to be greatly reduced for various reasons, including difficulty of assessing and progressing cases remotely.
- **Marginal clients** (those who are discouraged from pursuing their matter by relatively minor obstacles) are more likely to drop out if digital access issues get in the way. This is true of those phoning for advice about irregular status, for example, or those who are just scared to contact 'official' organisations for whatever reason.
- **Client groups for whom remote advice and casework are particularly challenging** were highlighted as:
  - **People with irregular status (refused asylum seekers, overstayers, etc.) who are experiencing homelessness.** Although it was sometimes easier to find such individuals (e.g. the 'Everyone In' scheme) during lockdown, maintaining contact and getting documents are even more challenging when they have to be done remotely.
  - **Asylum seekers.** *"I do think for asylum cases it's not been good. Even on Zoom you cannot get the same feel you need for asylum cases. It's been very difficult to get medical reports as doctors would see them face to face. I had one client who had a Zoom psychiatrist or psychologist interview but it wasn't that satisfactory. Physical examinations, for scarring for example, are needed but difficult to get."* [79]
  - **People with multiple vulnerabilities, such as people who have been trafficked or have experienced domestic violence.** Practical barriers inherent in such people's circumstances can make it difficult for them to access advice safely. For instance, they may not have access to any private, safe line for communication. Even if those immediate practical barriers are not present, it is vital to gain trust with such clients as well as ensure that safeguarding measures are in place in order to get the

78. Fieldwork interview citation.
79. Fieldwork interview citation.

information necessary to progress the case. Doing this online can be extremely challenging for providers and clients alike: *"I had one woman who had lots of different issues – victim of domestic violence, victim of sexual offence, mental health issues, and she did not want to be seen on a video at all."* [80]
Advisors are also alert to the need to be vigilant for signs of coercive control: *"We always say 'You must tell us that it is just you in the room, nobody else.' But that's not watertight, and more us risk-managing ourselves. Sometimes we pick up on something – we hear something, voices off. Those instances are normally brought to me as supervising solicitor and we have to take steps to check and get the person in. Remote from start to finish is not the way with those clients, I feel certain."* [81]

- **Limiting exceptions in all client 'types'.** There will always be exceptions, even in the 'easier' client groups, relating for example to mental trauma, language issues or digital exclusion. EUSS clients for instance have sometimes complex cases where there are serious barriers to them getting support.[82] Providers such as Bristol Refugee Rights are alert to signs of a client not understanding or fully disclosing their issues, so it tries to move such cases to at least one face-to-face meeting: *"Those who keep phoning or don't seem to understand after multiple attempts may have something more going on which they won't or can't disclose by phone or remotely – there's nothing for it but to get them in."* [83]
- **Lack of holistic support makes immigration advice more difficult.** As well as giving immigration advice, many providers also address hunger, loneliness, physical and mental wellbeing, and social integration, including employment. Given how long most immigration cases take, this support was often invaluable in maintaining morale and giving a sense of future. Although providers found inventive ways to keep in touch with clients (e.g. phoning every day, in some cases, through volunteer 'chat teams'), losing these largely in-person-only services affected the provision of advice: clients became more isolated and lonely, less forthcoming and more likely to be 'in crisis'.
- **Staff and volunteer limitations on remote working.** The benefits of being able to network, conduct internal meetings and learn (trainings, webinars) were noted. Limitations were also highlighted. After the initial burst of enthusiasm during the first lockdown, it seems that people are now increasingly unwilling to spend 'yet more time' on screens or use apps to connect, learn or meet. People reported being more choosy about which events they attended and which groups they joined: Covid led to the creation of multiple messaging groups, which some feel makes it more challenging to establish new networks.

80. Fieldwork interview citation.
81. Fieldwork interview citation.
82. https://www.lawcentres.org.uk/policy/news/news/better-support-for-vulnerable-people-needed-in-eu-settlement-scheme-new-report
83. Fieldwork interview citation.

Lessons for future delivery and replication

For the sector

- **Substantial and permanent shift in attitude towards remote advice and casework**. Changes implemented under Covid measures have produced a long-term shift in sectoral thinking around the provision of advice. Whilst many providers attested to an initial reluctance to change, benefits have been realised and understood: *"There was a feeling that this wasn't fair for clients, but that view has shifted."* [84]
- **Hybrid model emerges as the preferred way of working.** Providers report that, post lockdown, they are planning to introduce a hybrid model of advice and casework, combining remote methods where possible (and/or preferred by the client) with face-to-face interactions where needed, especially for clients experiencing disadvantage: *"We are going to have a hybrid system. Some clients have really benefited from being able to have a remote appointment – they don't have to worry about getting to the office, or their kids hanging around and so on. But some clients just need to see the lawyer and you need to see them. So we will have a mixed system and, moving forwards, the first appointment will likely always be face to face."* [85]
- **Technical flexibility needed with clients.** Access to justice through digital means will require flexibility, which means an ability to receive and process enquiries and data in a range of ways. This conflicts with data security issues, but from the client side it is vital to maintain at least initial openness to multiple points of enquiry and contact and then, with support, transition clients to more secure methods of communication.
- **Wraparound tech support to clients can help with greater advice efficiency.** Helping clients access and use tech is also important: one provider has referred some to the Good Things Foundation[86] for more prolonged support, others have developed briefings or tools to enable clients to understand and prepare for online interactions.
- **It is not an 'age game'.** Interestingly, there are challenges with younger and older people in transitioning to remote advice and it should not be assumed that barriers to, for example, client access to remote casework are age related. Tech savviness (in terms of using smartphones and apps) does not necessarily mean that young people are easier to advise remotely: some providers reported that they found it more difficult getting young people to engage given their reluctance to speak on the phone (rather than send messages).
- **Rethinking access 'pipelines' to legally-aided advice.** During the first year of the pandemic, the volume of legal aid casework dropped by up to 40 per cent: *"The old pipelines are broken and have been broken for about a year and a half now. If it wasn't the lockdown itself, it is the lags created by the delays when people sought help. Law Centres are telling us that fewer cases are being started and people are not getting to attend appointments when they need them."* [87] This applies to legally-aided advice generally, not just immigration advice. As a result, the Law Centres Network is

84. Fieldwork interview citation.
85. Fieldwork interview citation.
86. https://www.goodthingsfoundation.org/
87. Fieldwork interview citation.

working with members on community engagement strategies. Conversely, clients in need of immigration advice are still presenting in great numbers at frontline providers who then spend hours trying to refer clients when they require casework, often trying multiple legal aid providers many times before clients are placed. Clients can wait months for such onward referrals: the delays are partly due to fewer advisors, increasingly complex cases and substantial delays at the Home Office.

- **Rethinking outreach.** Lockdown measures have forced providers to rethink access strategies. As a result, some have permanently recalibrated how they prioritise and reach clients. Some providers offering drop-ins, for instance, have recognised that they need to ensure access for more needy clients as a matter of course rather than rely on admission through the drop-in process: *"Lockdown really made us consider the people who might not be accessing the centre as much, and how we check in on those people. Before, it was the people attending drop-in who were accessing most of our services. But through lockdown we set up systems to make sure we were contacting everybody, and some of those will be continued. We started reaching out to asylum accommodation for instance, and we created initially a big spreadsheet of all the people we were supporting or could support, and we phoned them to find out if they needed anything. We reached new people that way, some of whom really needed support but who would never have found us. That's been a shift."* [88]
- **Extending access points of initial enquiry through tech.** The importance of enabling clients to more easily and remotely access advice has been highlighted, and initiatives to enable this are springing up. Citizens Advice Sheffield has developed a series of access points[89] using DTEN,[90] which sets screens up in public locations such as libraries where clients can gain access to advisors immediately via a touch screen and get advice during set hours. South West London Law Centres have introduced a crisis navigation service[91] that handles initial queries through a dynamic set of questions on WhatsApp that lead the client along response-dependent pathways. The Law Centres Network has developed Enquiry Desk to help law centres triage enquiries quickly and has integrated different data sources for online case review and management.[92] These developments are not only useful at a time of pandemic but also improve accessibility for clients able to use simple technology.
- **Revised methods for triage, assessment and initial advice.** The need to engage clients through a remote process has produced multiple ways that triage and assessment are now organised, from the development of an online toolkit that specifies the documents that clients need to the engagement of administrative staff to gather, scan and organise papers for an advisor to use online.
- **Partnerships with trusted agencies and frontline workers.** Good working relations with key frontline workers (social services, asylum accommodation workers, care home workers, health providers, guardianship services, etc.) can significantly enhance capacity to deliver remote advice and casework. Caseworkers can support clients to understand the process and navigate technical access and input: *"We couldn't have done remote casework without our partners."* [93]

88. https://www.youtube.com/watch?v=ogoehBrDcCg
89. Fieldwork interview citation.
90. DTEN develops zoom-certified platforms for collaboration and communication. https://eu.dten.com/gb/
91. https://swllc.org/2021/03/17/introducing-the-law-centres-new-crisis-navigation-service/
92. https://www.enquirydesk.app
93. Fieldwork interview citation.

- **Range of lessons around 'digital resilience'.** Becoming more digitally resilient includes a range of potential measures, including:
  - **Moving to a cloud-based data case management system.** *"We were lucky. About two years before lockdown we brought in a new casework management system, a much more integrated one than the standard legal charity type we had before (but three times as expensive). The transfer of our cases was very problematic and we had two years of teething problems, but by the time lockdown hit we were running nearly all our cases electronically. This meant [when lockdown started] our fee earners could already effectively work from their desktop at the office, but from home."* [94]
  - **Choosing the right cloud-based system.** The Law Centres Network is recommending Clio for its ability to integrate different systems and platforms and incorporate data from a range of sources (WhatsApp, for instance) into case notes. The Law Centres Network is encouraging law centres to explore APIs [Application Programming Interfaces] when they consider the tools they are using and how to connect them with the case management system. This is key to future-proofing the system: if the messaging platforms used by clients are not machine readable, it creates more work for advisors in terms of transferring data. The few providers using Clio were enthusiastic about how it has helped their work, adding that they were happy with the ongoing support provided by the company. AdvicePro is also widely used, with providers reporting strong customer support: GMIAU, for instance, has asked AdvicePro to customise it to its system (e.g. adding template letters), which it has done quickly.
    - **Leased lines.** For effective cloud-based systems, moving from a broadband to a leased line can be key. A leased line is a connection reserved for one user only. Broadband generally offers fast download speeds, but where uploading is needed regularly, leased lines can be vital.
    - **Sound quality is crucial.** If advice is to be moved online, then it is crucial to maximise the clarity of what the client and the advisor are saying. Poor sound quality produces stress and is distracting, which introduces another unnecessary barrier for the client. Investing in headphones and microphones – which need not be expensive – can really improve.
    - **Support in taking decisions.** Digital resilience relies in part on being able to navigate a field crowded with tech providers and 'solutions' in which, as some noted, there are lots of 'cowboys'. To ensure not only data compliance but also value for money, providers need to get advice on anything from their case management system and data audits to reviews of their websites.
    - **'Fire drills' to be encouraged.** Encouraging remote working fire drills – where everybody works remotely at least for one week a year – enables advisors and organisations to assess how resilient they are.

94. Fieldwork interview citation.

- **Data compliance and security at early stages.** Providers have considered and resolved datasecurity issues to varying degrees. Adaptations include ensuring that staff and volunteers use only dedicated mobiles and laptops, transferring to a password-protected cloud-based case management system and avoiding where possible any platforms thought to have security concerns (such as Facebook Messenger and Zoom[95]). However, with exceptions, there is little sectoral understanding of or guidance on some of the trickier questions such as how documents are gathered and sent, which platforms are considered secure, how client messaging interfaces with an internal case management system, how data is stored on hardware and cloud-based systems, etc.[96] Some providers (e.g. JustRight Scotland, Central England Law Centre/KIND UK, GMIAU) outsource IT support and/or have employed an expert to oversee data security. The Refugee Rights Hub, part of Sheffield Hallam University, has access to the university's data compliance team, which conducted an initial audit and then supported the project to ensure all client data remained safe. Some providers already have staff members with an interest and skill in tech who lead internal data security measures and improve technical operations. However, providers without such dedicated support have been unable to assess or make the changes required.
- **Data security requires ongoing resources to maintain.** It is not just a case of getting the tech and installing more secure systems; technical maintenance and monitoring of how the tech is being used are vital. The 'laptop on a train' scenario was mentioned by many as a fear, and some have acute concerns about data breaches: *"I honestly think, from a data security point of view, it is simpler, cheaper and less risky to operate an office-based paper-type system. Because digital resilience – in terms of how you preserve your data and keep it safe, in terms of cyber accreditation and so on – all has a cost which I don't think most outlay. You need to be checking data isn't stored on people's laptops, that they are using their laptops correctly, that they are actually using the dedicated laptops, not other machines. We had a breach of that and we were on it – but that takes monitoring."* [97] Investing in encrypted case management systems, IT providers or in-house tech support are some ways that organisations are responding to this need: *"We have an amazing IT provider sourced for us via our Ops Manager with corporate experience and they are lovely enough to share the work they do in bigger places pro bono."* [98]
- **Client contact is still essential.** There is consensus that remote advice and casework can never replace some client contact, especially at the start of a case, to establish trust, reassure the client and fully assess options. The Law Centres Network gathered information on remote working during the pandemic, reaching the same conclusion. In-person contact is important for the client and for the advisor – who after all joined the profession because they want to help people – and both parties can feel a demotivating lack of connection when the only contact is on-screen: *"Remote advice and casework is great, but there is still substantial need for face-to-face advice. We need to hand clients tissues, and we need to be visible and real to the people we are supporting."* [99]

95. For instance, Northern Ireland Migrant Centre now requires that Zoom is not used for certain meetings and is trying to move away to Teams, which it sees as a more secure platform.
96. There have been some attempts to share information on this: for instance Refugee Action Good Practice Slack has a #tech channel on which a worker from LASSN (Leeds Asylum Seekers Support Network) posts information on data security.
97. Fieldwork interview citation.
98. Fieldwork interview citation
99. Survey respondent

For funders

Core funding principles and priorities. Overall, the messages on funding are: i) for tech innovation, invest in multiple types of projects to see what works and what does not; ii) vitally, do not invest just in innovation but also in sustainability and maintenance; and iii) invest in IT and hardware to ensure that remote working is feasible and sustainable (e.g. making provision for system updating, necessary on average every 4–5 years). In addition, considering these core costs as intrinsic to client-facing solutions is vital: "*Sometimes the greatest efficiency savings and quality improvement around client advice can be when you get your operations working as well as they can be.*" [100]

Sectoral support for digital audits, and acting on their findings. The reality of digital resilience in the sector is that it requires not only individual organisations but also the sector overall to evolve more secure and efficient digital systems. If smaller partners do not evolve, then *"homebrew systems grow up which are then hard to interoperate."* Some larger providers may have planned this shift, but for many it happened by chance: "*A lot of our pandemic resilience came from accident rather than design.*" [101] The Law Centres Network digital support team provides excellent support in this area, albeit limited to its members. But, even with this technical support, evolution requires funding if digital systems are to be comprehensively 'secure'.

Investing in tech people embedded in the sector. Dedicated technical expertise within the sector is rare. As mentioned, providers like Refugee Rights Hub benefit from being part of a larger institution, otherwise expertise is outsourced, provided by an interested advisor or staff member (e.g. GMIAU or Migrant Advice NI) or, rarely, by employing staff with a technical specialism (e.g. KIND UK and Central England Law Centre). The benefits of having such staff are not just that they can 'fix' issues but also that they can help organisations identify the 'unknown unknowns', risks and potential savings and generally help staff and the organisation to become smarter, more accessible and more resilient. This kind of technical support to guide development in the sector is essential if the potential of remote advice and working is to be realised. It can also, longer term, save money: *"I recently had to justify [name of tech support] salary. I pointed out that we had been ripped off on our website for about five years, and that has totally changed. We've started an app development project with the GLA [Greater London Authority]– that wouldn't have been possible without them. So it saves, and it brings opportunities."* [102]

Pan-sectoral support for improving digital 'practice'. Providers often take decisions about tech solutions without expert support, which can affect their operations, budgets and client data security. A few of the challenges this might create include, for instance, buying and installing software licences unnecessarily, ensuring that equipment purchases are linked to guarantees on software updates or ensuring that best practice around client data security is understood and implemented. Providers need to take the right decisions about how to evolve their technology and how to maintain it, but many providers simply don't have the time or skills to do that. Considering how a pan-sectoral response might support digital audit, maintenance and innovation (a second-tier dedicated support team, for example, with tech experts running it) might help those who cannot afford their own support staff.

100. Fieldwork interview citation.
101. Fieldwork interview citations.
102. Fieldwork interview citation.

Investing in specialist provision to enhance capacity of other organisations. The pandemic has highlighted that online learning is possible and often desirable for providers. It has also shown that specialist providers can support capacity building 'at a distance' by, for example, providing training and supervision of staff hoping to gain OISC accreditation. Such support takes time, however, especially for OISC Level 2 or 3 when close supervision and checking of cases is essential. It was estimated that this might take one or two days a week in the early months of such training, reducing as the advisor-in-training becomes more confident and proficient. Investing in such support can significantly enhance capacity, therefore, but only if the required resources are properly planned and allocated.

Support needs to outreach and engage, not rely on sharing practice. Individuals and organisations in the field are prepared to share good practice. However, this is one area where 'community' sharing alone seems inappropriate, partly because it is very easy to ignore risks and threats when they are poorly understood or seem like a lower priority than meeting the presenting client's needs. This is one area where a Slack channel alone – as provided by Refugee Action's Good Practice and Partnerships team – seems insufficient: engagement on that channel is low, despite some excellent postings, and Slack generally is proving challenging as a form of ensuring sectoral engagement. For example, the Law Centres Network digital support team does not use Slack; it uses Contentful[103] as a community platform,[104] which is backed up by individuals dedicated to synthesising and promoting digital good practice.

Tech innovation and its potential. Innovation is key, but its potential usefulness and replicability need to be considered carefully. For instance, there is no good open-source case management system. Tools such as docassemble[105] are being considered, but compared to tools available in the non-legal sector, free tools are scarce. In addition, apps are being developed all the time,[106] although many are abandoned after only short-term use. One current example: KIND UK is investigating how to incorporate elements of the immigration advice process into an automated first-stage triage, potentially saving significantly on advisor time by reassigning high-skilled OISC 2 advisor time to entry-level data entry or even client self-reporting.

However, this is difficult given that, although a lot of data collected may be deterministic, there is a need for qualitative input (e.g. 'How good is the evidence for this?') which precludes being able to give authoritative answers on all but clear-cut cases. If such developments occur without regulatory backing, there is a significant risk of losing client confidence and removing the opportunity for advisors to train on the 'lower slopes' of advice.[107] As another example, the Law Centres Network is integrating Twilio[108] – a bulk texting tool – into its Enquiry Desk, responses to which can be logged back to client records, thus improving data collection on outcomes. Such developments need to be considered carefully (are they useful more widely?), allowed to fail as well as succeed and, vitally, actively promoted and costs of adaptation by further adopters met when they prove useful.

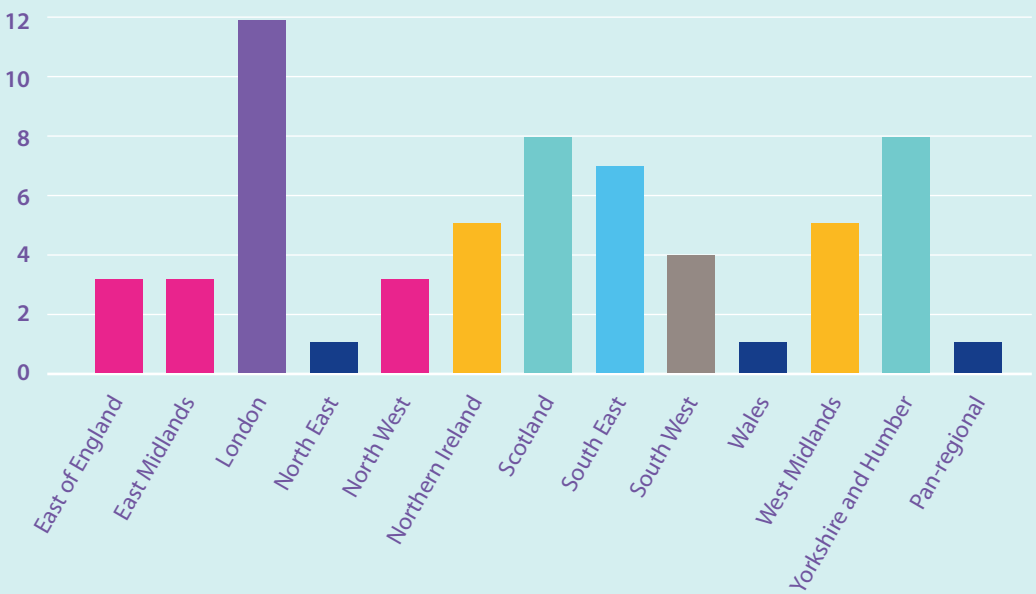
103. https://www.contentful.com
104. https://www.lawcentres.org.uk/policy/news/news/improving-people-s-access-to-justice-through-better-knowledge-sharing
105. https://docassemble.org
106. https://www.americanbar.org/news/abanews/aba-news-archives/2019/01/explosion-in-apps-includes-promising-ones-to-improve-access-to-j/
107. The Solicitors Regulation Authority and OISC would need to be aware of and support the building of a robust automated lawyering system with code review standards, etc.
108. https://www.twilio.com/

Appendix A: Information sources

1. Survey

An online survey was sent out in Autumn 2021 and garnered 61 full responses from respondents in 59 migrant-specific and non-migrant specific organisations. Organisations were identified through the MICIA research and through the Justice Together Initiative's contacts. There was a good geographical spread of responses, with most coming from London (12) but with strong responses given the comparative incidence of immigration advice providers from all regions. Wales and the North East had the lowest response rate with only one response each. One organisation (KIND UK) was pan-regional, covering the North East, North West, London and Scotland.

Responses by region or country



Most respondents were advice providers, with four having only a strategic role. Twenty-five providers delivered OISC 3 or SRA-regulated advice, with another 20 providing OISC Level 1 or 2 advice. Others provided initial support and signposting for those needing immigration support. In terms of size, only 7 organisations indicated that they had more than five advisors, with 33 indicating that they had five advisors or fewer.

2. Interviews

Online interviews were conducted with 23 people, identified through the survey, recommendations and known sources of digital experience and expertise, such as the Law Centres Network's digital team. Where there were digital developments of particular interest, more than one interviewee per organisation was contacted to get different perspectives on what had been developed and learnt. Interviewees are listed below by organisation.

Organisation/Project	Name
Bristol Refugee Rights	Beth Wilson
Cardinal Hume Centre	Debbie Adler
Central England Law Centre	John Glanville
ELSH (Educational Learning Support Hub, Barnsley)	Florentine Bootha-King
GMIAU (Greater Manchester Immigration Aid Unit)	Denise McDowell
GMIAU (Greater Manchester Immigration Aid Unit)	Ryan Bestford
Hackney Migrant Centre	Anna Mulcahy
Hackney Migrant Centre	Lauren Stewart
JustRight Scotland	Kirsty Thomson
JustRight Scotland	Laura Ffrench-Constant
KIND UK	Katie Fennell
King's Arms Project	Hannah Joy
Law Centres Network (Digital team)	Emily MacLoud
Law Centres Network	Nimrod Ben Cnaan
Migrant Centre Northern Ireland	Aggie Luczak
Nottingham and Nottinghamshire Refugee Forum	Barbara Dhliwayo
Refugee Action	Julie Mansfield
Refugee Action	Lora Evans
Refugee Rights Hub (Yorkshire and Humber)	Liz Dew
Rights of Women	Jasbinder Bhatoa
St Augustine Centre, Halifax	Nikki Clarke
Staffordshire North and Stoke-on-Trent CAB	Jude Hawes
Voices in Exile	Charles Brown

3. Other sources

Locked Out: Barriers to Remote Services by Sophia Hayat Taha and Jude Hawes for Refugee, Asylum and Migration Support Service, Staffordshire North and Stoke-on-Trent (2021). This publication is not currently available online.

The TARA Service – Covid Service User Snapshot by Trafficking Awareness Raising Alliance (TARA) and Glasgow City Council, April 2020–February 2021.

Achieving Digital Equity in Access to Justice. Final report by Kate M. Murray (lead researcher) for Legal Aid British Colombia, October 2021. https://legalaid.bc.ca/sites/default/files/inline-files/Murray_2021_LABC_Achieving_Digital_Equity_Final_Report.pdf

Paul Hamlyn Foundation

How the remote delivery of immigration advice evolved during Covid

The digital and capacity implications of this change

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