This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

CETA Case Lead Guidance V2

Updated Spring 2022

This is a revised version of the case lead guidance, based on [redacted]'s original version but incorporating feedback from volunteers who have been through the transition from consultant to case lead. While some sections have been modified, one thing hasn't: ***please*** communicate with the broad team on the **#clinic-practice, #case-leads,** or directly with the leadership group on Slack as new problems come up!

This document is long because it is close to (although never quite) comprehensive. You may have picked up on much of this during your time shadowing/consulting. However, I strongly recommend reading at least the first three sections before you begin leading cases and the rest as needed.

Quick Links:

Scripts for Emails/Text/Phone:

Contact numbers and Interpreter Account Information:

Table of Contents (full)

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

Getting Started: Setting Up

If you've completed a pseudo-lead appointment (e.g. handled a call from start to finish with backup), then congratulations: you've already cleared one of the most important hurdles of being a case lead! Many of the remaining differences between acting as a case lead versus a consultant are administrative. **You are now responsible for client PII, scheduling, and communicating the status of the case via the case and appointment trackers.** With these new responsibilities come some new tools and considerations, detailed below.

Accessing Your Secure Cornell Inbox

New case leads are assigned a secure Cornell Box in the format of [redacted]. **This email is anonymized for your safety and the clients.**

1) Log into your NetID (*redacted*) email at outlook.com using SSO.
2) Click on your initials in the top right corner to open a drop down menu (see picture).
3) Select "Open another mailbox" and type in your id. There is no need to add <at> cornell.edu. You can bookmark it for quick access later.

Accessing Your RingCentral Number

You are also assigned a RingCentral number. The RingCentral number is used for calling or texting clients (and/or caseworkers) usually to schedule an appointment and sometimes to conduct an appointment (see [Conducting an Appointment] for instructions).

❗ **By default, your RC number voicemail includes your name, and client texts/voicemails are forwarded (with PII) to your non-secure e-mail. We highly recommend changing the voicemail (instructions below) before you use your number to call clients and require changing the notification settings.**

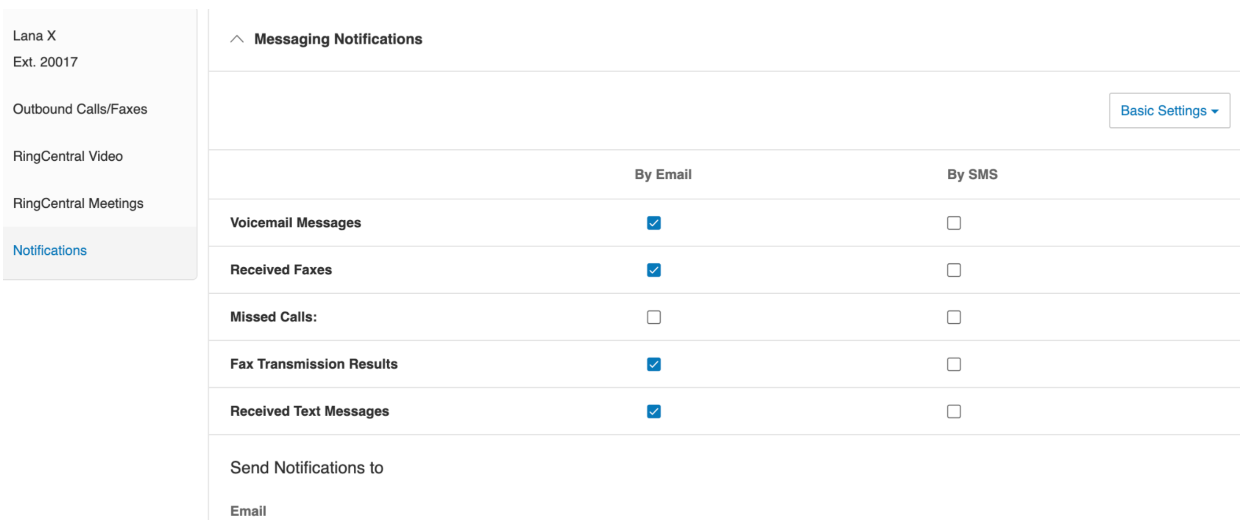
Signing in: You can download the app to your phone or access RC from the web. To log in from the web, go to https://login.ringcentral.com/. Click on **Single Sign-on (SSO)** and authenticate your NetID.

❗ **Change your voicemail message:** After logging in, click on **Settings >>Messages.** Below the **"Voicemail Greeting"** prompt, click on **Edit.** Record a custom voicemail message. **Do not**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

mention your name, CETA or Cornell in the voicemail message. An example voicemail is: *"Hi this is <name>, leave a brief message and I'll try to get back to you as soon as possible."*

❗ **Change your notification settings:** By default, RingCentral will forward texts and voicemail notifications, including client PII, to your NetID account. To change, you need to log into the **Administrator Portal** (this is different from the **app)** at https://service.ringcentral.com. Once in the portal, click on "Settings", and then "Notifications" in the left hand bar. Here, you can either uncheck email notifications altogether, or keep them on but send them to your tech_clinicXX



address (see above). **Do NOT** change the email address under **User Details, only the one under "Send Notifications to:".** You will not be able to log back in if you change the User Details one.

Accessing The Secure Zoom Account

Similar to the secure email, the secure Zoom account is used to create anonymized meetings. The Zoom log-in credentials can be found on Box here *[redacted]*. (Need access? Contact leadership!).

Being booted out of the Zoom during an active session will **not** end an active meeting or remove you from the call. You will be able to continue hosting the active call while logged out as a Zoom zombie. Nonetheless, **we recommend logging into Zoom with your regular NetID via SSO, which will allow you to add your NetID as an alternate host when creating appointments in the shared secure Zoom.**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

The Case Tracker

Up until now, you may have been blissfully ignorant about the case tracker. The case tracker is where case leads (you!) leave notes about attempts to contact the client, completed appointments, needed follow ups, and discharges. **It is important to keep us (the leadership team) updated in the case tracker, and if you don't, we ([redacted]) will unapologetically send you relentless e-mails and Slack messages.** Responding to those messages counts as an update, as we will update the case tracker *for you* if you respond. **The case tracker is our main point of reference for ensuring that our clients are receiving a care. Be warned, we will assume that a blank case tracker means that you have not contacted the client and act accordingly.**

Thinking About Your Name

Case leads have much more direct contact with clients than seconds or shadowers. Having a first name to share with a client can help build rapport and prevent awkwardness, especially when writing emails or leaving voicemails. However, not all people are comfortable using their actual name. While some of us still choose to use our real first names, we encourage you to think carefully about your personal boundaries, and consider creating a pseudonym. You may eschew a name entirely, but it may make some client communication more difficult.

Communicating Your Availability

By default, we assign a maximum of two cases to a case lead at a time, logged on the case tracker.

- DM leadership to change your capacity anywhere between 0-3.
- You never need to explain to us why you're asking for a change in capacity.
- Feel free to update us about your capacity as often as needed.
  [top]

Family Justice Center Leadership

If you have questions about an individual case, please contact the case worker listed on the referral form first. However, if you have an urgent issue and cannot reach that case worker, or if you are trying to schedule an in-person appointment, alert the leadership team and we will assist in contacting the following FJC directors at each borough.
[redacted]

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

Receiving A Case

This section describes what happens when you receive a case and guidance on how to go about handling it. When you are assigned a case, you will receive three things.

- A message via Slack or email. **If you have a preferred method of communication for notifications, e.g. a personal email address, Slack, etc, please make sure to communicate this to the leadership to ensure you receive assignment notifications.**
- A Box folder shared to your Cornell email containing the client's intake chart
- An email to your secure inbox with the client's contact information.

Deciding How To Handle A Case

Not all cases require a full appointment, and in some cases you may want to contact the case worker before the client for more information.

- It is possible that the intake describes issues that are beyond what we are trained to do.
  - If you feel this is the case, **please feel free to contact the leadership team for support**.
- On rare occasion, you may be able to handle the majority of the client's concerns via email, although this is at your discretion.
- Most cases will require you to schedule a 1 hour initial appointment with the client.

Interpreter Services + Language Competencies

Some clients list a language other than English as their primary language.

We try to match clients with the language competencies listed on the CETA members page. You may always check if there is another consultant who has listed familiarity with the clients primary or secondary language, and invite them to work on the case with you. However, unless you (or someone you have partnered with for this case) are comfortable interpreting the client's primary language, you should use the interpreter service enlisted by the FJCs.

Each FJC has an account with Voiance interpretation services which we are allowed to use for clients. Each account has a PIN that is periodically changed, so the below information may be out of date. **If the FJC is not listed below or if the PIN does not work, contact the leadership team.**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

[Account information redacted].

Using the Interpreter Service:

- Dial the number. Use RingCentral, not Zoom, as you need the dialpad.
- Enter the account and PIN.
- You will be asked to state the language of the interpreter you would like.
- Once connected, the interpreter will ask for your name and the name of the person you are trying to reach.
  - If you do not have a name for the client, you can explain that they did not leave their name but that they should be expecting to hear from you.
- If you're not calling to schedule, best practice is to inform the interpreter of the nature of the call so they are not caught off-guard:
  - E.g. *Hi, I have scheduled an appointment with a client. I also wanted to give you a heads up that I work with a domestic violence agency, so this call may involve some discussion of abuse.*
- The translator will dial out for you.
- If you cannot reach the client, the best practice is to not leave a message.
  - If you do want to leave a message, leave the same vague voicemail as always.
- There is no expectation for you to go through the consent form, and in fact discourage it, due to the time limit and ethical issues raised by having an interpreter. This is at your discretion.
  [top]

Scheduling an Appointment

- Review the intake information on the chart, particularly email/text/call permission and safe contact times.
  - **It may not be safe to contact them outside of that window or by other means.**
  - For example, if the client lives with their abuser, they may only feel safe to have an appointment while at work or visiting a close friend or relative.
- If, based on the intake form, you'd like additional information from the case worker, to solicit preemptive advice/support about an unusual tech issue, or that the contact window will be very difficult for you, please reach out to us via DM or the #clinic-practice channel.
- We strongly encourage having a second for all appointments, especially first appointments.

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

  - **If you are struggling to find back up, contact leadership.**
- **Contact clients to schedule an appointment within 1-3 days, and at most, *one week* from receiving the referral.**
  - **If you have doubt as to your ability to make this window, alert leadership.**
  - We won't hold it against you, but we do we care deeply that our clients receive care in a timely manner, so we may step in to reassign a case or set expectations with the client.

A Note on Scheduling + System Oriented Trauma

Initial contact and scheduling an appointment with clients can sometimes be the most difficult part of case lead duties. Please don't be discouraged if the client fails to answer after an initial email or phone call. From a trauma-informed perspective, clients often have a lot of other things going on, may feel avoidant towards tasks related to their abuse history, and on top of that, we are strangers reaching out to them from out of the blue! Once we manage to get in contact, clients are often much more responsive and eager about setting up an appointment. If you're having trouble reaching a client, of course feel free to share in the #clinic-practice channels.

System-Oriented Trauma

System-oriented trauma is when a client feels as though they are undergoing another experience of trauma (*retraumatization)* in a treatment context, including in their interactions with their caseworker or staff. Sadly, many settings designed to treat or care for trauma may unintentionally create traumatizing experiences.
Examples that are particularly relevant to our work at CETA include:

- insensitivity as to how the client's traumatic history has affected their life
- minimizing or discrediting client responses
- providing substandard service to clients of marginalized identities (e.g. non-native English speakers).
- Other examples may be difficult or impossible to anticipate, such as using specific phrases, sounds or actions that have a harmful association to the client.

In the clinic, we can anticipate the risk of retraumatization caused by CETA itself by adapting our approach to working with clients. If you need a refresher on speaking to clients please review the slides we used for training or reach out to one of the leadership team directly. **If your client**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

discloses what they have identified as unacceptable behavior from a case worker, please also let the leadership team know so we can work with the FJC directors to address it.

Initial Contact: General Protocol

Detailed information about communicating via phone, email, and voicemail is in the following sections. Regardless fo communication method, the overall protocol can be summed up as:

Step 1: Send an initial outreach via the method of your choosing, in accordance with the clients contact preferences. **Update the case tracker.**

Step 2: If the client does not respond after several days, make a follow-up attempt to contact them. Try a different method of communication if possible. **Update the case tracker.**

Step 3: If a week has passed without no response, contact the case worker. You may do so yourself; however, you can simply let us know in the Slack channel that you've made a couple unsuccessful attempts at contacting the client from case XXX, and [redacted] or some other member of the leadership team can contact the caseworker on your behalf. Either way, **update the case tracker.**

Step 4: If no response from the case worker for another week (see below), mark the case as inactive, and send the case worker a discharge note letting them know to submit a re-referral if needed (see: Nonresponsive, inactive, and no-show clients). If the case worker responds, confirm the client's contact information and ask them for assistance in setting up the appointment. **Update the case tracker.**

Whatever method you use to contact the client, if you have confirmed an appointment time, it is usually helpful to let clients know that you will be calling from either a secure Zoom line or your RingCentral number, and that if they receive a call from an unknown number at that time, it's probably us.

Help! My Client Didn't Provide a Safe Phone Number! (script)

If the client does not have a safe phone number nor a safe email: Usually if this is the case, CETA leadership has already contacted the caseworker before sending you the case, and if you haven't received further instructions via Slack or email, we didn't read it carefully and made a

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

whoopsy. Let us know, but we'll have to just email the caseworker for assistance.

If the client does provide a safe email (but no phone number): Then you can email the client directly asking them how they would like to proceed with an appointment. The options are (1) provide a safe number (2) email a Zoom link created from the Tech Clinic Zoom, or (3) the client goes to the referring partner organizations physical office and use their equipment. Suggested script below:
Dear [client],
I'm reaching out from the Cornell Tech clinic; we received your referral from [organization]. Your contact information stated that you were not comfortable with us calling or texting you, so I wanted to reach out about how we can conduct an appointment.

1. *we can help you schedule a time to come into [organization] to make a phone call using the equipment there.*
2. *you can provide a friend or other safe contact phone number for us to call.*
3. *we can send you a Zoom link to this email address. Please note that in this case, there is no need to turn your camera on or join with video if you are not comfortable with doing so; we are happy to conduct an audio-only appointment.*

Please let me know what your preference is among these options, and feel free to reach out to this email address or your caseworker with any questions.
Kind regards,
[chosen signoff]

Help! My Client Chose a Zoom Appointment!

You can conduct the appointment as normal but keep in mind the following for **your and other consultants comfort and safety:**

- Make sure the link you created has the waiting room enabled. It should be enabled by default, but good to double check so you have time to set up the Zoom comfortably before the client joins.
- Let the other consultants join before admitting the client so they have time to change their name and turn their camera on/off.
- Make sure you pay attention to all consultants changing their Zoom display names to something they are comfortable with! The client will be able to see display names.

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

- **Camera consent:** You and other consultants are under no expectation or obligation to turn your camera on in this situation. You can let the client know that *"We're sensitive to concerns that many of our clients may have surrounding using their cameras, so we encourage everyone to only turn on the camera if it makes them feel more comfortable. I personally choose [to keep my camera on/off]."*
- **Recording:** You can proceed with consent to record as normal, but make sure that the recording is local (not to the cloud) and to delete the video and only upload the audio file (.m4a).

Scheduling Via Email (script)

If the client's primary language is not the same as yours and email is the only safe contact point, send the email to the caseworker and ask them to help translate or set up the appointment. **Only send emails to clients or case workers from your secure inbox.**

SUBJECT: Cornell Tech Clinic Referral
Hi <client's first name>,
I'm reaching out from CETA, the Cornell University tech clinic. You were recently referred to our services by <referring organization>. Thank you for taking the time to reach out to us.

I'd like to set up an appointment for you to discuss the issues you described. We would call you from a secure conference line and talk for approximately one hour. Are you available at any of the following times?

- *Time A*
- *Time B*
- *Time C*

If none of those times work, let me know what does and we can try to accommodate you. You can also contact me via call/text at <RingCentral number>. Please let us know if you have any questions.
Kindly,
<Your name> (and/or) the CETA Team

Scheduling Via Phone (script)

If the client's primary language is not the same as yours, follow the instructions in the interpreter guidance above. **Always confirm that it is the client on the line before providing details.**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

If you do not have a name for the client, then you can say *"I'm calling about a referral I received from <caseworker name>."* If they are still confused, you can say, *"Sorry, I don't have a name listed for the referral. <Caseworker name> said you might be interested in talking with us."* If they are still confused, then to be on the safe side, you can say, "OK sorry, I'll reach out to <caseworker>" and contact the caseworker.

Once you have confirmation, then you can proceed with something along the lines of:
I'm calling from CETA, the Cornell University tech clinic. You recently filled out our form on referral from the <borough> FJC. I'm calling to schedule an appointment. We would call you from a secure conference line, and talk for about an hour. Are you available…<offer times>

Make sure to give the client your RingCentral phone number so they can get in touch with you if needed.

Sending A Text/Leaving A Voicemail (script)

It is standard practice in settings such as CETA to leave a vague voicemail unless the client specifically tells you it is okay to leave messages. A 'vague voicemail' here means leaving a voicemail on the client's device that lets a client know that we have been in touch but does not disclose confidential information.

HIPPA provides guidance in these contexts stating that to "*reasonably safeguard the individual's privacy … [providers] should take care to limit the amount of information disclosed*". In our case, the client's abuser may hear their message. We should limit the amount of information we leave so there is minimal risk to survivor safety if it is intercepted.

Because the same is true for text messages, we suggest a similar approach for an initial text message until you've confirmed that you've reached the client. A suggested voicemail/text script you could use is:

Hi <client name, if provided>. This is <name>. I am trying to reach you to schedule an appointment that you recently requested. You can call, text, or leave a voicemail at [RingCentral#] to reach me with any questions. Thank you.

Do not:

- Use your personal phone number, only RingCentral
- Mention your name, if you do not feel comfortable
- Mention the FJC, Cornell University, Cornell or Cornell Tech Mention the 'clinic', the Clinic to End Tech Abuse or CETA

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

If The Client Doesn't Respond (script)

If you've tried to contact the client several times through available methods to no avail, notify the caseworker and ask for assistance. If you the client isn't responding, they may be avoiding strange calls/emails; in this case, its helpful for the caseworker to let them know your email address or RingCentral so they know its a trusted number. However, often if you cannot get in touch with the client, the caseworker can't either. To cover this range of possibilities, we suggest the following script:

Dear [caseworker name],
I hope this email finds you well. We reached out to your client <name> a couple times but haven't heard back; are you able to confirm if this client is still interested in our services? If you are unable to get in touch with them or we don't hear back within the next week or so, we'll mark this client inactive and they can submit a new referral if they change their mind. If you are able to get in touch with them, feel free to share this contact email and phone number (<RC #>) with them. Please let me know if you have any questions. Thank you!

Kind regards,
[name]/[the CETA team].

When The Client and Case Worker Don't Respond (script)

If the caseworker has not responded in addition to the client, you have a couple options:

Option 1: Notify c/w of inactivity and instruct them to re-refer
You can send a variation of the following email to the caseworker:

Dear [caseworker name],
I hope this email finds you well. I'm following up regarding the client you referred to us [name]/whom we don't have a name for but whose contact information is [contact]. As we still haven't heard back from you or the client, we're going to assume this client is no longer interested in our services. However, if we are mistaken or the client changes their mind, we encourage you to contact [redacted] or submit a new referral to make sure they are connected to an active consultant. Please let me know if you have any questions. Thank you!

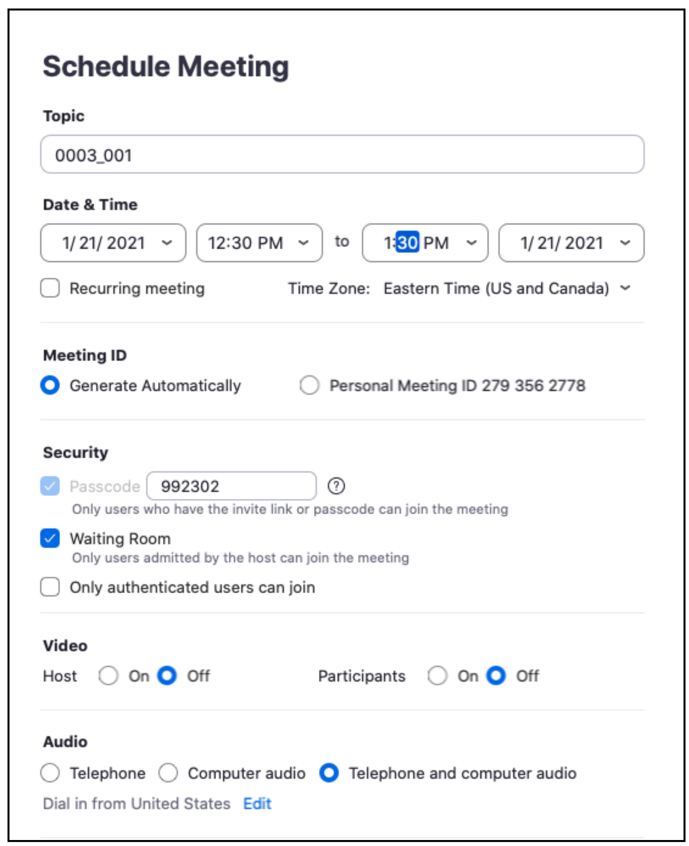
This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

Kind regards,
[name]/[the CETA team].

Option 2: Ask Leadership to Contact the FJC Directors
We can fall back to reaching out to the appropriate FJC directors. You may want to do this if you have heard from the client once or twice but since had trouble getting in contact, or if the intake form information suggested the client was high risk. If you want to reach out to the FJC directors, ask CETA leadership to help.

Setting up the appointment

After an appointment has been scheduled, you need to document the appointment in the appointment tracker and set up an appointment on Zoom. If the client is contactable by email, it may improve client no-show rates to schedule a reminder email to be sent the day of or night before the appointment. Zoom instructions are below.



Log into Zoom using the *redacted* address; instructions are above. Click on the "+" symbol next to "Upcoming" and "Recorded" to create a new appointment. Name your appointment, **"<case ID>_<appointment ID>", e.g. "0003_001" for the first appointment for case 0003.**

Other important settings:

i. Generate meeting ID automatically. **This is the default option.** Do NOT use personal meeting ID.
ii. Enable waiting room**. This is the default option.**
iii. Set yourself, and optionally your second, as alternative hosts via your regular Cornell NetID accounts. If you receive an error, you may need to activate your NetID-linked Zoom account by logging into Zoom via SSO with your NetID.

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

iv. We encourage building 10-15 minutes of slack time for pre-meet and debrief before and around the appointment. E.g. for an appointment from 1:30-2:30, schedule it from 1:15 to 2:45.

Once you've set up an appointment, enter the appointment in the appointment tracker. and notify #clinic-practice of the upcoming appointment. You may also want to create a corresponding calendar event in whatever personal calendar you use, so you can share it with any seconds or shadowers who join the call.

[top]

Conducting an Appointment

You may conduct an appointment either via Zoom or via RingCentral, depending on what you are comfortable with. If other people are on the call, it is usually easier to use Zoom. **If using Zoom, make sure all names are set to whatever each person is comfortable with.** To call the client from Zoom.

1) Go to Participants → Invite → Call Out.
2) In the **Invitee Name** field, enter *Client* and in the **Phone Number** field enter the client's safe phone number.

If the client does not pick up, our general policy is to leave a vague voicemail saying that you are calling about a scheduled appointment, wait five minutes and then try calling again. If they do not pick up, wait another five minutes and then try again. At that point, if you still haven't received an answer, you are free to consider it a no-show or keep calling at your discretion. Keep in mind that once 15 minutes have passed, the remaining allotted time might be too short to get any meaningful work done. For our full guidance here, see non-responsive, no-show, and inactive clients.

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

During The Appointment

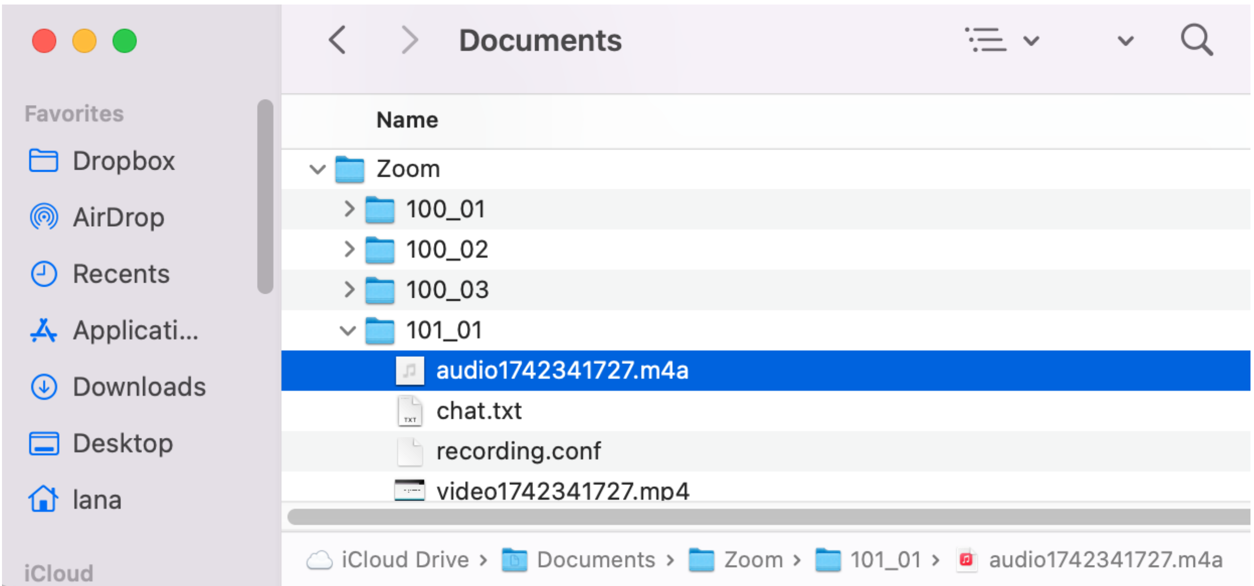
- **Always disclose how many CETA staffers are on the call.**
- Before beginning the appointment, remember to ask the client to confirm whether they are in a safe and private place to take an hour long appointment with the tech clinic.
- Use the v4 oral consent.
- If the client consents to recording for research, you may record the call directly in RingCentral or Zoom. **Always notify the client when you are turning on recording.**
- Communicate with your second and other team members on Slack
- Keep notes on the Live-Notes.docx file on Box within your case folder.

Wrapping Up An Appointment

- **Update the appointment tracker and the case tracker.**
- **Upload any recordings to the Research-Data folder in the case folder Box renamed to the appointment ID (e.g. 003 --> Research-Data --> 003_001.m4a).**
    - On RingCentral, the recording can be found under **Phone >> Call Recordings.**
    - On Zoom, a pop-up will appear that says "Converting meeting recording." **See below screenshot for the output.**
        - On MacOS, a Finder window will pop up showing the three created files. Otherwise, you can search for the **Zoom** folder.
        - On PC, it may be a bit tricky if you don't know the location the files were created in, but it's usually in a folder named Zoom, e.g. ".../Documents/Zoom/".
        - **Zoom automatically generates 3 files; we only need the audio file ending in .m4a.**
    - **Delete the recordings from your local machine or RingCentral after uploading.**

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

- If you've determined that you need a follow-up appointment, see the notes of follow up



appointments below. Otherwise, see "closing a case" below.
- (Optional but encouraged) Drop a note in #clinic-practice to share how it went!

Follow Up Appointments

If you deem a follow up appointment necessary, the process for setting up an appointment is essentially the same as scheduling an initial appointment. However, we strongly encourage trying to keep the same team (e.g. the same seconds and shadowers on the original call) by considering their schedules and giving them first options at scheduled follow ups. **On follow up appointments, remind clients about the consent form and ask if they'd like to review it. At a minimum, ask if they are still comfortable with notes and recording if they agreed last time, and always notify everyone on a call when you have begun a recording.**
[top]

Closing A Case

Set your case to 'inactive' in the case tracker! This is how we know you're available to take a new case. If you are not planning on scheduling another appointment, you can mark the case as "inactive" in the tracker. It is at your personal discretion whether you choose to do this before or after sending the PCC. If you are not planning on scheduling another appointment but are following up via email with the client, then feel free to mark the case as "semi-active" (which also shows you as available to take a new case). *To change these settings (i.e. to not receive a new case), DM/email/contact leadership and otherwise see "Communicating Your Availability"*

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

Post Consult Communication (PCC)

A PCC is not always needed, and whether it is needed is at your discretion. If, at the end of an appointment, there is no need to follow up with the client (by e.g. sending them additional guides or looking into outstanding problems), then a PCC may not be necessary. If you think it would be useful, you may ask the client if they'd like a summary of the appointment with a reference link to the guides for issues covered in the appointment. This is particularly useful if they have other similar devices or accounts that they'd like to secure, but often not necessary. This PCC FAQ document has some boilerplate follow-up information that consultants have written for past PCCs.

If they say no (and there are no outstanding issues to follow up on), then there's probably no need for a PCC. **I**f they do say yes or they do have outstanding issues, then **make sure you have permission to either email** them or, as an alternative, permission to email their case worker the PCC.

If you do deem a PCC necessary, please write the body of the PCC in the Box file as a record of your communication with the client. Do not include the client's PII, such as their first name or e-mail.

Send A Discharge Email To The Caseworker (script)

You should **always** email the client's case worker to let them know you've met with the client. If you don't have permission to communicate with the case worker about the client's situation, then don't send any other information. However, if you have permission, then you can let them know about any important findings.

Example:

Dear <case worker name>,

I'm reaching out from Cornell CETA to let you know we recently saw your client <client's name or otherwise some identifying PII> in our tech clinic. During the appointment, we went over the client's concerns about <X>. We (did/didn't) find evidence of compromise, and we took steps Y and Z to secure their accounts. We're marking this case as inactive [because they haven't reached out for a follow up appointment], but if you have any questions or if the client has new concerns, please feel free to contact the admin team at [redacted].

Best,

<name + the CETA Team>

This will of course depend on what actually happened with the client, such as letting them know if you are 'discharging' the client because you cannot get in contact with them.

[top]

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

Norton Referrals

If you've offered the client a Norton license and they've accepted, then let [redacted] know the case ID on Slack and he will allocate a subscription. We recommend Norton licenses if the client has one or more non-Apple devices and the client would benefit from spyware protection, either for personal comfort or because of high risk. However, this always at your discretion.

The licenses offered through the FJCs are for Norton 360 Deluxe. The Norton subscription is for **1 year of free protection services for up to 5 devices**. Protection services include: anti-spyware, antivirus and malware; webcam security; dark web monitoring; password management and more. **Note that this product does not scan Apple devices for malware/spyware**. No antivirus has that capability (due to restrictions by the Apple operating system software. Most clients who accept a license will want a follow-up appointment for installation, but you can try sending them the subscription code and a guide and suggest they request an appointment if they run into issues.

An example for email text introducing a Norton subscription is below, most likely included with any other follow-up information:
The discussed Norton subscription is for 1 year of free protection services for up to 5 devices. Protection services include: anti-spyware, antivirus and malware; webcam security; dark web monitoring; password management and more. The exact services vary based on type of device.

Your personal product key for your Norton 360 Deluxe subscription is: [License Key]. Please keep this information in a safe place once you have used it to start your subscription.

Follow the steps below to set up your subscription and install on a laptop:

1. *Go to Norton.com/setup*
2. *Click on the Enter Product Key button*
3. *Setup an account. Use any safe email address for your account setup.*
4. *In the MyNorton Portal, click download*
5. *Enter your product key (provided 25 digit code)*
6. *Select device(s) to install on.*

Follow the steps below to set up your subscription and install on Android:

1. *Use a browser to go to https://norton.com/setup*
2. *Click on the Enter Product Key button*
3. *Setup an account. Use any safe email address for your account setup.*
4. *Enter the product key written above (the 25 digit code)*
5. *On your Android phone, go to the play store, search for "Norton 360", and install it.*
6. *Open the newly installed Norton 360 app, login and follow instructions to activate.*

This is a redacted version of CETA's technology consultant guidance document. We do not expect our consultants to have memorized all of this information; it is for them to refer to back to; often when consultants have questions, we can simply direct them to the appropriate section in the guidance first to see if that answers their questions.

If you need assistance or have questions about your subscription, please ask us or reach out to NortonLifeLock's customer support center by phone or online chat at https://support.norton.com/sp/en/us/home/current/contact

The following resources can be helpful when helping clients to activate their Norton 360 license:

- Lifewire's guide on installing Norton (it has images that show the process to follow): https://www.lifewire.com/install-norton-antivirus-4589383
- NortonLifeLock Partner's Norton 360 installation videos: https://www.nortonlifelockpartner.com/security-center/norton-360-installation.html

[top]