



# Presenting documents to clients in Social Work encounters

## *Apresentando documentos a utentes em atendimentos de Serviço Social*

### RESUMO / ABSTRACT

In Social Work, documents provide important information concerning clients' situations and how institutions operate. Because these objects may contain technical information not easily understood by clients, it is crucial that professionals present them in a clear manner by showing them, explaining their function and allowing clients to read them on their own. Based on a video corpus of Social Work encounters in Portugal, and grounded on the framework of

Ethnomethodology and Conversation Analysis, the present study examines how social workers describe and show documents to clients, highlighting some of the practical challenges and opportunities that emerge within the course of this activity. By doing so, this study aims at contributing to a multimodal, socio-interactional approach to Social Work practice, as well as to the study of document-centered practices in institutional settings.

**Keywords:**  
Documents;  
Ethnomethodology  
and Conversation  
Analysis; Social Work


Em Serviço Social, documentos fornecem informações importantes sobre as situações dos utentes e o funcionamento das instituições. Porque estes objetos contêm informação técnica que pode não ser facilmente compreendida pelos utentes, é crucial que os profissionais os apresentem de forma clara, mostrando-os, explicando a sua função e permitindo aos utentes que os leiam autonomamente. Tendo como base um corpus vídeo de atendimentos de Serviço Social realizados em Portugal,

e estando ancorado no quadro da Etnometodologia e Análise da Conversa, o presente estudo examina como assistentes sociais descrevem e mostram documentos a utentes, identificando alguns dos problemas práticos e oportunidades que emergem no decurso desta atividade. Deste modo, este estudo visa contribuir para uma abordagem interacional e multimodal da prática do Serviço Social, bem como para o estudo de práticas centradas em documentos realizadas em contexto institucional.

**Palavras-chave:**  
Documentos;  
Etnometodologia e  
Análise da Conversa;  
Serviço Social

### AUTOR

**David Monteiro**

 davidtomasmonteiro@gmail.com



Instituto Politécnico de Portalegre

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## 1. Introduction

Written documents constitute a central feature of the workplace activity of *street-level bureaucrats* (Lipsky, 1980), i.e. professionals who intervene directly with citizens and manage their specific situations through the local application of rules and bureaucratic procedures. Such is the case in Social Work, a domain of social intervention where professionals assist clients in ensuring access to social support, providing advice on the basis of documents and texts at hand. These documents contain detailed information on clients' rights and obligations as users of specific institutional services, as well as on bureaucratic procedures, i.e. "course[s] of action prescribed by a set of rules designed to achieve a given objective uniformly" (Blau, 1963, p. 23). Yet, some of this information may not be easily understood by clients, due to documents' complex textual organization and the technical nature of the information they contain. For this reason, it is crucial that social workers present documents to clients in a clear manner, in order to "help to alleviate the anxieties related to the welfare system" (Greenberg and Lackey, 2006, p. 178) and promote clients' bureaucratic literacy.

The present study proceeds within the framework of Ethnomethodology and Conversation Analysis (EMCA), a qualitative approach to the study of social interaction. A detailed analysis of how social workers present documents to clients, based on video recordings of Social Work encounters, will show how this activity is accomplished by participants through their moment-by-moment, coordinated mobilization of linguistic, bodily and material resources, with a specific focus on practices of describing, manipulating and inspecting written documents. Moreover, it will show how participants treat documents and the information these contain as relevant for managing clients' concerns and consequent for the exercise of social intervention.

### Document use in institutional interaction: an EMCA approach

Documents are omnipresent in the everyday lives of citizens, professionals and institutions, participating in the production of social reality through the use of documental information in many different fields of activity (see Asdal, 2015; Pleshkevish, 2010). Addressing the functional dimension of documents, Gitelman (2014, p. 2) points out that:

The word "document" descends from the Latin root *docer*, to teach or show, which suggests that the document exists in order to document. Sidestepping this circularity of terms, one might say instead that documents help define and are mutually defined by the know-show function, since documenting is an epistemic practice: the kind of knowing that is all wrapped up with showing, and showing wrapped with knowing.

In the social sciences, the use of *documentary* evidence is likewise fundamental for investigating how action and knowledge are produced *in situ*, e.g. through practices of showing and inspecting, and for examining how these are interactionally managed in specific praxeological environments through the coordinated and concerted mobilization of talk, bodily conduct and objects. This approach is at the core of EMCA, a qualitative framework for sociological research in which the ordinary, common-sense methods whereby social order is accomplished are examined through the *documentary method of interpretation*, i.e. by looking at particular, specific occurrences of the phenomena under study (Garfinkel, 1967).

Based on the study of audio recordings of naturally-occurring conversations and the subsequent development of a set of conventions for transcribing talk-in-interaction (Sacks, 1984; Jefferson, 2004; see also Sidnell and Stivers, 2013), EMCA research began to investigate language as a lived phenomenon at the center of the situated production of social activity, offering a radical alternative to traditional studies of language, based on written text and detached from actual circumstances of use. Following earlier attempts at investigating embodiment in social interaction (see Erickson, 2011; Mondada, in press), the introduction of affordable video-recording equipment in the consumer market led to an *embodied turn* in EMCA (see Nevile, 2015), i.e. a growing interest in video-based investigations of multimodality (see Goodwin, 1981, 2000a, 2010; Heath, 1986; Heath et al., 2010; Mondada, 2013; see also Cruz et al., 2019; Mondada, 2019), examining how social interaction is organized around a complex interplay of talk and bodily conduct.

Studies on multimodal interaction provide crucial contributions to the study of workplace settings, investigating important aspects of its organization, namely participants' visual practices (Goodwin, 1981, 2000b; Mondada, 2018b), reading and writing (Mondada and Svinhufvud, 2016) and object use (Day and Wagner, 2019; Nevile et al., 2014). Addressing these topics, studies on interactions between professionals and citizens show that: a) documents and other inscribed objects are recurrent features of the praxeological and material ecologies of social interactions in a wide range of settings, being treated as locally relevant in participants' talk and/or bodily conduct through practices of referring, describing, pointing, handing, inspecting, reading aloud, writing, etc.; b) participants orient to an asymmetric distribution of access to material objects and/or knowledge of the information contained therein, e.g. when providing personal identification documents for filling out an application form (Klein et al., 2014), recording patients' information on medical consultations cards (Heath, 1986), using naming cards in speech therapy exercises with aphasic patients (Merlino, 2018), or paying for goods (Mondada et al., 2020); c) objects' visible and material features are treated as locally relevant for accomplishing specific institutional tasks, e.g. when describing and searching for paper documents for collecting clients' documentation (Monteiro,

2019); d) reading and writing practices are embedded within larger courses of action, and its progressivity may be halted in order to attend to other concerns, e.g. when revising public inscriptions of citizens' proposals in participatory democracy meetings (Svensson, 2017).

Multimodal EMCA provides important methodological and analytical contributions to research on document use (see Day and Mortensen, 2020), shedding light on the interactional organization of *situated literacies* (see Barton et al., 2000; Street, 1997) and revealing how, in institutional settings, its accomplishment is fundamentally oriented towards managing clients' concerns (see Ostermann et al., 2020). The present study aims to contribute to these lines of research by examining the multimodal organization of the document-presenting activity as it is carried out in Social Work encounters, showing its situated accomplishment as organized through a complex interplay between orality and literacy, i.e. by talking and reading in interaction.

## EMCA studies on social intervention and Social Work

An important interest within EMCA research resides in investigating the workplace as a perspicuous setting for understanding *the practicalities of rule use* (Zimmerman, 1970) which, in professional routines involving direct assistance to citizens, occasions the production of categories (see Sacks, 1966) and the routine application of rules and bureaucratic procedures, often on the basis of documents (see Zimmerman, 1969). The acknowledgement of talk-in-interaction as fundamental for the production of work and the enactment of institutionality led to studies on the differences between institutional talk and ordinary conversation concerning the organization of turn-taking (Sacks et al., 1974), as well as to detailed studies on specific settings, showing how their constitutive activities are organized by participants' orientation to asymmetrical distributions of knowledge and tasks (Drew and Heritage, 1992).

Further developments in research on institutional interaction took place upon the dissemination of EMCA across the Atlantic, namely an increased expression of studies on social intervention, e.g. child protection (Iversen, 2013), welfare encounters (Flinkfeldt, 2020) and adoption-assessment interviews (Wirzén and Čekaitė, 2021) in Sweden, parenting services (Symonds, 2018) and dispute mediation (Alexander and Stokoe, 2019) in the United Kingdom, aid to homeless persons in France (Mondemé, 2010), or bureaucratic support to migrants in Italy (Klein et al., 2014). Research on institutional talk-in-interaction has also been vital to the development of EMCA in Portuguese-speaking countries (see Garcez, 2002; Loder and Jung, 2009), with an important focus on social intervention settings, e.g. feminist intervention (Ostermann, 2008), police emergency helplines (Del Corona, 2001), in-shelter volunteering (Lisboa, 2019), and social work encounters (Binet, 2013a; Binet et al., 2014).

Within this line of research emerged an applied approach to EMCA (see Antaki, 2011; Ostermann, 2008; Richards and Seedhouse, 2005; Stokoe et al., 2012), centrally concerned with the practical challenges and opportunities that emerge throughout the course of the situated production of social activities, and their implications for the accomplishment of institutional tasks (especially those involving the provision of assistance to persons in a frail situation). This approach places central attention in pointing out how communicative practices at work may be improved, often calling for the involvement of practitioners in the reflexive appreciation of its fine-grained interactional details, greatly contributing to the recognition of EMCA as a powerful framework for examining workplace interactions, namely in social intervention settings.

Qualitative research on Social Work shows that language and talk are central to the exercise of professional activity in this domain: besides discursive and narrative approaches to Social Work practice (see Hall et al., 2014), this domain is seeing a growing interest from EMCA scholars (see Binet, 2013b; De Montigny, 2007; Kirkwood et al., 2016; Monteiro, 2019; for an overview, see Flinkfeldt et al., 2020). Yet, the majority of these socio-interactional studies remains overwhelmingly limited to the analysis of audio data, an approach which drastically obscures the complexity of Social Work, i.e. the *visual witnessable features* (Rawls et al., 1997) of its embodied and material dimension (see Birk, 2017; Scholar, 2016). Addressing this issue, recent studies have begun to examine the multimodal organization of social workers' and clients' visual, mobile and/or object-centered practices, e.g. writing down clients' address on a form (Monteiro, 2016) or guiding a prospective resident on a visit to a home for elderly persons (Monteiro, 2017), revealing how these play an important part in the everyday, situated accomplishment of Social Work. Aiming to further carry out this line of research, the present study highlights how the document-presenting is routinely managed by the participants, as well as some of the practical challenges and opportunities that may emerge within its course.

## Setting and Data

In Social Work, the provision of assistance to citizens in need takes place in service encounters organized within institutions specialized in social intervention, e.g. in public and private welfare or healthcare settings. While specific aims of each encounter vary among institutions and concern clients' specific situations, these encounters typically revolve around clients' requests for institutional support for themselves or for someone under their care (typically an elderly relative) and social workers' subsequent presentation (or revision) of formal procedures for applying for institutional services. In these encounters, clients bring documental evidence of their situation and institutional involvements (e.g. personal identification, invoices, bills, contracts); likewise, social workers routinely use specific paper documents (e.g. forms,

lists, rulebooks, contracts) for collecting and/or retrieving clients' information, explain how the institution functions and provide instructions on how to proceed.

Fieldwork for this study took place between 2013 and 2016 in four institutions in Portugal: one assisted living facility for elderly persons, one community association, one neighborhood-based welfare agency, and one public hospital. Upon ensuring the formal authorization of the national authority for data protection and the institutions under study, recordings took place after obtaining oral and written informed consent from the participants, resulting in a corpus of audiovisual recordings comprising forty-nine encounters (22 hours approximately) between social workers and clients (see Monteiro, 2019). The data was transcribed according to the conventions developed by Jefferson (2004) and Mondada (2018a), in order to preserve the sequential and multimodal organization of participants' audible and visible conduct and "all possibly relevant embodied actions, such as gesture, gaze, body posture, movements, object manipulations, etc. that happen simultaneously to talk or during moments of absence of talk" (Mondada, 2019, p. 3). In compliance with ethical procedures for data protection, participants' names and other confidential information were replaced in the transcripts, and images were edited so that participants' faces become unrecognizable, ensuring their anonymity.

## 2. Analysis

On the basis of five extracts, the analysis will examine the interactional organization of the document-presenting activity as it is carried out in Social Work encounters, showing that the presentation of a document at hand may be initiated by the professional for introducing a specific bureaucratic procedure (**Extracts 1-2**) or by clients when addressing some specific matter of concern (**Extracts 3-5**). Moreover, it shows that the activity proceeds around partic-

ipants' orientation to managing some aspect of the clients' situation, e.g. calculating costs or eligibility for institutional services (**Extracts 1-2**), making sense of a deadline (Extract 3) or understanding the origins of delays in receiving invoices (**Extracts 4-5**). The first two extracts will provide for an initial description of how the document-presenting activity unfolds in a stepwise manner around professionals' reference to documents and written texts and prompts to clients' visual inspection and reading of documental sources of information at hand. Moving on to examine some of the practical problems that may emerge within its unfolding, **Extracts 3-4** will show how the emergence of a halt to the progressivity of the activity is managed by suspending or sustaining visual access to a document. Finally, **Extract 5** will show how participants' conflicting orientation to the relevance of a document is solved by looking at another documental source of information.

## 3. Presenting documents, texts and bureaucratic procedures

In presenting documents to clients, social workers orient to an asymmetrical distribution of access to the document at hand and of knowledge of the information it contains (often written in technical terms). The document-presenting activity hence proceeds as professionals ensure clients' ability to: a) see the document and know what information it contains; b) read the text written on its surface(s); c) understand documented bureaucratic procedures. A first extract illustrates how, through talk and bodily conduct, a professional presents a paper document in a stepwise manner, projecting and adjusting to clients' progressive orientation to visually inspecting the object and the textual information it contains. We join the action as social worker Isa prepares to show the institution's rulebook to Maria and Rui, the two clients sitting in front of her:

### Extract 1 (SWPT\_B6, 14.27)

```

1 ISA      portanto vocês têm aqui o regulame:nto:#s, (0.6)
           so you.PL have here the rulebook, (0.6)
isa        >>looks at document-->>
isa        sflips page-----s
Im          #Image 1
2          .th e::sh:: (0.7) se::h (.) e têm aqui e:h depois
           .th eh (0.7) eh (.) and (you.PL) have here then
isa        s.....sgrasps-->
3          a fórmula de cá:lsculo:. (.)
           the calculation formula. (.)
isa        -->slifts-->
4          ques~ depo:iss# (.) snóss te~mos saquis as percenta:gens.~ (.)
           which then (.) we have here the percentages. (.)
isa        s.....spoints-->>
isa        -->srotates---splaces on table-->
mar        slooks at paper-->>
rui        ~adjusts glasses-----~,,>

```



```

rui                                     >>looks at RIT@looks at paper-->>
rui                                     ≈bends tw paper-----≈
Im                                     #Image 2
5      vamos ver.
      let (us) see.
rui    ,,>.....≈rests hand on paper-->>
Im     #Image 3

```



Figure 1

In line 1, Isa announces the document that she previously placed on the center of the table (Image 1, Fig. 1) and, flipping to the next page, she treats it as immediately available to both clients (through proximal deictic *aqui* / “here” and second person plural *têm* / “(you.PL)<sup>[1]</sup> have”; line 1). While visually inspecting the page, the professional refers to a specific element of information (“the calculation formula”; line 3), treating it as likewise accessible. She then picks up the document and rotates it in the direction of the clients (Image 2, Fig. 1). After placing the open document on the table, Isa identifies another textual item in the document (line 4), pointing to it. Both clients align with Isa’s prompt to a joint visual inspection: Maria shifts her gaze towards the paper on the table, and Rui adjusts his eyeglasses. The professional sustains her pointing gesture onto a portion of the document and topicalizes the joint inspection of the document by all the participants, referred to through first-person plural inflection *vamos ver* / “let (us) see” (line 5). The clients align with the collective reading activity, as Maria rests her chin on her hand and Rui rests his hand on the lower edge of the paper sheet (Image 3, Fig. 1).

In presenting documents to clients, professionals display a constant orientation to the specific situation of the participants to whom their actions are addressed, targeting their a)

knowledgeability about the document and the information it contains and b) ability to visually inspect the document in an adequate manner. Professionals accomplish this by placing the document at the center of the *interactional space* (Mondada, 2013), prompting participants’ joint attention to it. The oral presentation of the object proceeds through a series of descriptions, whereby it is treated both as a single object and as containing several relevant textual elements, which the professional highlights through pointing gestures (see Goodwin, 2003; Mondada, 2014). Concomitantly, the professional repositions the document towards the clients, granting them the ability to read it by themselves.

Given participants’ orientation to showing and reading, presenting documents to clients is constrained by the material features of the document at hand and how it is positioned vis-à-vis the participants. This can be further observed in a next extract, where a professional presents a document written on both sides of a leaflet – first presenting information written on each side, and then leaving it on the table so that the clients may grasp and inspect it themselves. We join the action as social worker Eva advises Gil and Ana, son and daughter-in-law of a hospitalized man, to prepare for the patient’s discharge from the hospital by registering him in two institutions listed on the leaflet:

[1] In the extracts, grammatical information on number in person pronouns and verb inflections is glossed in the translation as ‘.PL’ for plural, e.g. ‘you.PL’ / “vocês” (see Extract 1, line 1) and ‘sg’ for singular, e.g. ‘(you.sg) will’ / “(você) vai” (see Extract 5, line 2).

## Extract 2 (SWPT\_D1, 34.56)

1 **EVA** eu acho que deveria:m (.) eh fazer inscriçã:o (0.4)~  
i think that (you.PL) should (.) eh make a registration (0.4)  
eva  
ana  
~bends fwd-->

2 **aqui nes#tas duas instituições#es#f#**, (0.4)  
here at these two institutions, (0.4)  
eva  
..>#puts paper on table-#  
eva  
#.....#points-->  
ana  
-->f  
Im  
#Image 4

3 **que cobrem a área de residência de#le,**  
that cover his area of residence,  
eva  
-->#.....#  
eva  
>>looks at paper#looks at GIL-->

4 (1.5)  
5 **e::h pa#ra internamento em la::r, (.) 'tá be:m?#**  
eh for internment at a nursery home, (.) alright?  
eva  
#.....#holds paper-->

6 (0.4)  
7 **EVA** **a#qui têm a# documentação# que vocês precisam de reuni::r,#** (0.6)  
here (you.PL) have the documentation that you.PL need to gather, (0.6)  
eva  
-->#grabs paper, turns-----#  
gil  
~bends fwd-----~  
Im  
#Image 5

8 **#para:: (.) e:h m# (0.9) efetiva:#r (.) a::#**  
for (.) eh m (0.9) finishing (0.3)  
eva  
#turns paper-----#puts paper on table#slides#,,>  
ana  
>>looks at EVA\$looks at paper-->>

9 (0.1)#(0.2)  
gil  
#looks at paper-->>

10 **a i#nscri#ção# lá:#**  
the registration there,  
eva  
,,>#  
gil  
\$...\$grabs,slides paper-->  
Im  
#Image 6

11 (0.2)\$ (0.7)  
-->\$

12 **e dei#xa#rem-na concluí:#da**  
and for (you.PL) to leave it concluded  
ana  
\$nods--->  
gil  
\$picks, turns paper\$

13 **p'ra ele poder entrar em# lista de espe:ra:\$,**  
so that he may enter a waiting list,  
eva  
-->#looks at ANA-->>  
ana  
-->\$

14 **ANA** m hm,  
15 **EVA** e ficar a aguardar: (.) vaga.  
and remain waiting for a (.) vacancy.

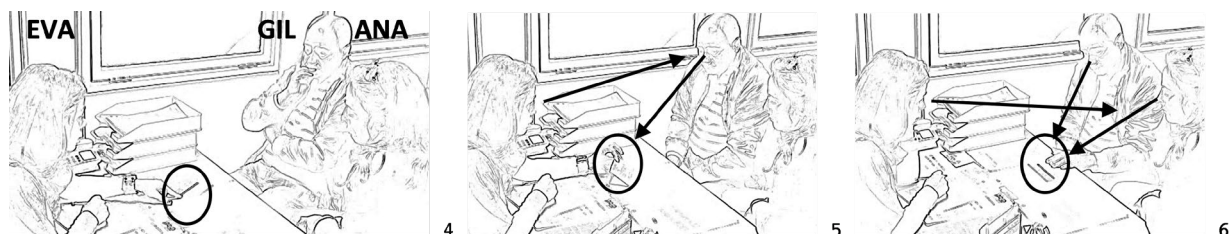


Figure 2

In line 1, Eva advises the clients to apply for institutional support for their relative outside of the hospital. Placing a small leaflet on the table, she points to a small portion of text (via proximal deictic *aqui* / 'here') and refers to two written elements as "two institutions" (line 2 and Image 4, Fig. 2), explaining their specific geographical scope and institutional function (lines 3-5). After flipping the paper, Eva then points to a list printed on the back (Image 5, Fig. 2) which she describes as "the documentation that you.PL need to gather" (line 7), subsequently explaining what to do in the future (lines 8-13). The professional then shows the text on the other side of the paper and, after placing the leaflet on the table, slides it towards client Gil. As he grasps the leaflet and inspects each side of the object, Ana looks at the paper in his hands and, nodding, acknowledges the information provided by the social worker (line 14), while Eva visually monitors her orientation to the document (Image 6, Fig. 2).

The document-presenting activity proceeds through a constant orientation to the document as a visible, tangible, readable and shareable object and, moreover, as an authoritative source of information – all along with a display of the professional's knowledge of and access to it. Throughout the activity, professionals treat a document at hand as containing specific textual elements whose relevance is addressed through multimodal practices of describing and highlighting and, subsequently, by ensuring that clients read it on their own. In doing so, they constantly orient to the interactional affordances of the document's material and textual features (e.g. text size, how the page is oriented vis-à-vis participants, the existence of text on both sides of a paper sheet) and how these allow or hinder clients' ability to individually inspect it and, consequently, confirm information previously provided on an oral basis.

## 4. Managing the interplay between orality and literacy: on the momentary suspension of the document-presenting activity

The everyday exercise of Social Work practice is carried out along an interplay between orality and literacy – the former being traditionally associated to direct intervention with clients in need of assistance and the latter related to an increasing influence of bureaucratic and managerial modes of organization in this domain (see Tsang, 2007). The situated management of this interplay can be appreciated throughout the course of the document-presenting activity, especially so when professionals' inspection or description of written information occasions its momentary suspension. This section will examine some of the practical problems that may emerge from professionals' orientation to finding information (**Extract 3**) or providing non-technical explanations (**Extracts 4.1-4.2**), and how these are managed by the participants.

### Presenting and searching for written information

When a client's question on how the institution works prompts the professional to answer by showing official information written on a document at hand, troubles in finding relevant text leads to a halt in the presentation of the documental source. This can be observed in the next extract, where we join the action as client Joel asks social worker Clara about the procedure for paying monthly fees to the residential institution where his mother-in-law lives and, in response, Clara grasps an official document containing that information:

#### Extract 3 (SWPT\_A6, 47.26)

```

1 JOE      e o valo:r (.) que eu tenho que transferi:r,
           and the amount (.) that i have to transfer,
joe        >>looks at CLA-->
2          (0.3)
3 CLA      até ao dia vi:nte.¢
           until day twenty.
cla        >>looks at doc¢looks at JOE-->
4 JOE      até ao dia vi¢nte.=
           until day twenty.=
cla        -->¢looks at doc-->
5 CLA      =tal como es[tá aqui no&
           =just as [is here in the&
6 JOE      [exa:cto.
           [exactly.
7 CLA      &no refigulamento=
           &in the rulebook=
joe        -->£looks at doc-->
8 JOE      =no re[gulamento.
           =in the ru[lebook.
9 CLA      [no: ¢no contra::to¢#. (1.0)
           [in the in the contract. (1.0)
cla        ¢rotates doc tw JOE¢flips doc open-->
Im         #Image 7

```

#Image 8



11

information (line 10) and suspends the trajectory of sliding the document towards Joel, sliding it back towards herself (Image 8, Fig. 3). Whereas Joel minimally acknowledges the information provided by Clara (line 12), she engages in a silent inspection of the document, accounting for her ongoing visual search by topicalizing the availability of this information in the document (line 13). The professional engages in silent reading and, by topicalizing a problem in retrieving information (line 15), she accounts for the delay in showing it to the client. Then, pointing to a portion of text on the open page and saying *aquí* (line 16 and Image 9, Fig. 3), she treats the search as completed and rotates the



document towards Joel (Image 10, Fig. 3) for showing him what she found. She then reads the text aloud (lines 16-17), requesting and obtaining his confirmation (lines 18-19) as she monitors his reading (Image 11, Fig. 3).

Routinely, professionals treat documents as authoritative sources of information and as relevant for managing clients' concerns, whether general (e.g. explaining how a service functions) or specific (e.g. answering a question on a particular aspect of a procedure). Such can be further appreciated in the fragment above by looking at how the professional treats the oral provision of information as needing to be supported by documental evidence. This orientation becomes especially salient when the professional: 1) explicitly refers to the document as a source of information for supporting her answer, then obtaining the client's collaboration (lines 5-9); 2) withholds the document and topicalizes her search for specific text, accounting for trouble in finding it on her own (lines 13-15); 3) presents the retrieved text to the client by both reading it aloud and showing it, so that he may see for himself (lines 16-17). These practices for producing linguistic and embodied reference (see Hindmarsh and Heath, 2000) and establishing joint attention (see Mondada, 2014) convey a constant orientation to support information provided through talk with textual sources in which

this information is visibly, publicly attested.

### Highlighting a specific item while providing technical and lay descriptions

Technical descriptions often feature in the documents presented in Social Work encounters and, in some cases, may be treated as challenging clients' ability to understand and comply with documented procedures. The next extract shows how the presentation of a document may be formatted in order to provide a lay description of a term treated as relevant so that it is explained in a simple manner. While this may halt the progressivity of the document presentation, participants' orientation to the relevance of written elements within the document may be sustained through embodied highlighting, e.g. continuing to produce a pointing gesture onto the documental source throughout the explanation of the technical term. Clients Rute and Tim ask social worker Lia for help in making sense of a document they received from the social security concerning a refund of money paid in excess to Rute according to the composition of her household. We join the action as, having quickly glanced over the papers that Rute handed to her, Lia asks the clients to present the issue at stake:

#### Extract 4.1 (SWPT\_C13, 00.20)

1 LIA      *entãoÇ pedem pa' devolve:r (.) relativamente ao quê.*  
             *so they ask to return (.) relatively to what.*  
       lrh      >>grasps paper-->  
       lia      Çlooks at paper rh--->  
 2      (1.0)  
 3 TIM      *a geÑnte pensa que sejaÐ dos abonos,*  
             *we think that it may be of the benefits,*  
       lrh      -->Ðflips paper-----Ð  
 4 RUT      *é:: dos abonos.*  
             *it is of the benefits.*  
 5 JOR      *só que os abonos sempre foi escaÇlão a,*  
             *but the benefits was always in rank a,*  
       lia      -->Çlooks at paper lh-->  
 6      *e isso nunca teve problema.*  
             *and that never had a problem.*  
 7 RUT      *e isso continua a ser no escalão a.*  
             *and that continues to be in rank a.*  
 8      (2.6)Ç(0.3)  
       llh      -->Çflips paper lh-->  
 9 RUT      *só queÇ eu pus o tim no meu agregado familiar háÇ pouco teÇmpo.*  
             *but i have put tim on my household a little time ago.*  
       lia      -->Çlooks at paper on rh-->  
       llh      Çdrops paperÇ  
 10 TIM      *háÐ três:s [me:ses.*  
             *three [months ago.*  
       lrh      Ðflips paper rh tw clients-->  
 11 LIA      *[mas issoÐ é ÇsóÐ a partir daÐqui#.*  
             *[but that is just from here on.*  
       lrh      -->Ð      Ð.....Ðpoints pen tip at doc-->  
       llh      Çpoints index at doc -->  
       Im      #Image 12

12 TIM     *exactamente, portanto era# o que eu*  
              *exactly, so it was what i*  
              lrh                                *slides tip downwardpoints---*  
              Im                                        *#Image 13*

13     *'tava-te aÇ querer explicar,#*  
              *was wanting to explain to you,*  
              lia                                *-->Çlooks at RUT-->*  
              lrh                                        *-->Ç,,>*  
              Im                                        *#Image 14*

14     *não é por mim [que eles tiravam.*  
              *it is not because of me [that they would take away.*

15 LIA     *[aÇquiÇ quando dizÇ (.)*  
              *[here when it says (.)*  
              lia                                *-->Çlooks at doc-->>*  
              lrh                                        *,,>Ç...Çpoints pen tip at doc-->>*  
              tim                                        *Ç.....Çlooks at doc-->>*

16     *majoração (.) de agregado familiar monoparenta:l,*  
              *increase (.) of single parent family household,*

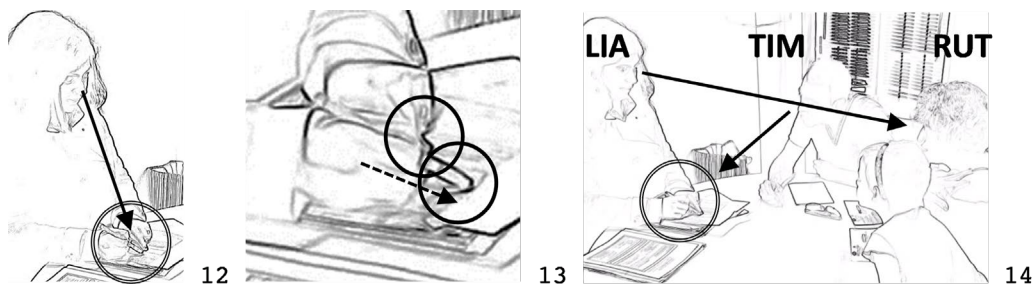


Figure 4.1

Lia asks the clients what the document is about (line 1), obtaining a candidate answer and a subsequent confirmation of this information from the two clients (lines 3-4). While Rute and Tim further present the issue (lines 5-7), Lia inspects the two pages of the document, holding one in each hand. Then, as Rute announces that she recently formalized Tim as part of her household, treating it as a possible origin of the current problematic situation (line 9), Lia places one of the sheets of paper on the table, turning it around in order to show it to the clients. As Tim collaboratively completes Rute's prior turn, locating the formal change in household composition three months before (line 10), Lia points to text in the lower part of the page, informing the clients

from where the changes apply (line 11) and, highlighting a specific part of the text (Image 12, Fig. 4.1), slides the tip of her pen downward, pointing a trace along the temporal progression of due payments as represented in the text (Image 13, Fig. 4.1). While Tim confirms, subsequently topicalizing his previous difficulty in explaining it to his partner (lines 12-14), Lia sustains the pointing gesture on the document and looks at Rute (Image 14, Fig. 4.1). The professional then refers to that specific part of the text using proximal deictic *aqui* and, highlighting the corresponding part of the text by pointing with the tip of the pen, she begins to read (lines 15-16), coming across a technical term for which she then projects and provides an explanation:

### Extract 4.2 (cont.)

17 LIA     *é que (.) Çquando o agregado é monoparenta:l, (.)*  
              *it is that (.) when the household is single parental, (.)*  
              llh                                *>>points index at doc-->*  
              lrh                                *>>points pen tip at doc-->*  
              tim                                *>>looks docÇlooks LIA-->*

18     *ou seja (.) sóÇ [aÇÇ*  
              *this is (.) just [theÇ*  
              llh                                        *>>Ç...Çgesticulates-->*

19 TIM     *[só a mãe.*  
              *[just the mother.*

20 LIA     *Çmãe e os fi:lhos,# ou só o pai e os fi:lhos, (.)*  
              *Çmother and the children, or just the father and the children, (.)*  
              Im                                        *#Image 15*

```

21      tem uma ma#joração, (.) recebe mais uma percentagemzinha.
        you get an increase, (.) you receive a little percentage more.
lia                                          -->G,,>
lia                                          -->Clooks doc-->
Im          #Image 16                                #Image 17

22      que# é# i[fsto#.
        which is th[is.
lia      ,,> G..#points to doc w lh index doc-->>
rut      >>looks lia#looks doc-->>
Im          #Image 18

23      RUT          [que# é os sete euros e quatro, certo?
                    [which is the seven euros and four, right?
tim          -->#looks RUT-->>

24      LIA      exa#tamente. pronto.
                    exactly. there.
lia          -->Clooks RUT-->>

```

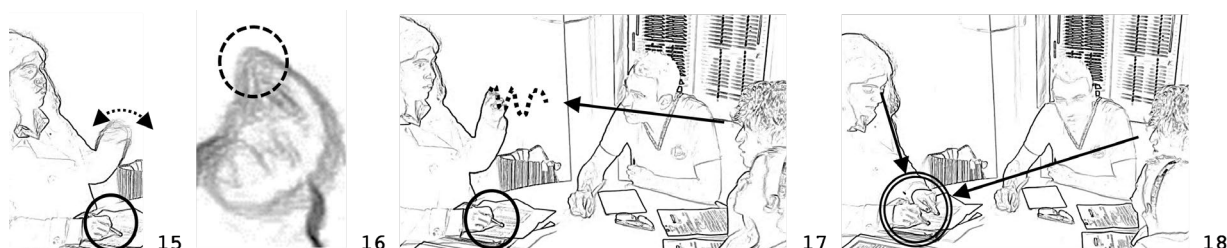


Figure 4.2

Projecting an explanation (line 17), Lia prepares to operate a specification (line 18) when, in slight overlap, Tim produces a collaborative completion (line 19). Lia continues to describe the term *monoparental* and elaborates upon the description provided by the client, adding the two closest alternative declinations of the 'family' collection contrasting with *the mother* (see Sacks, 1992, I, p.135), i.e. *the children* and *the father* (line 20): here, the professional raises her left hand, gesticulating while referring to the two possible parent-child dyads (Image 15, Fig. 4.2). Lia continues to gesticulate, pressing her index and thumb together (Image 16, Fig. 4.2) when referring to the first element of the term she had read aloud ('increase', line 21). She then explains what the term means concerning its practical consequences to the client (line 21), produces a writing gesture with the tip of her fingers (Image 17, Fig. 4.2). Still pointing to the same place with the tip of the pen she holds in her right hand, Lia lowers her left arm and points to the specific part of the text with both hands, further highlighting it by describing it as the text she is showing ('which is this', line 22 and Image 18, Fig. 4.2). Rute provides an aligned response, demonstrating her understanding by recycling, in partial overlap, the expression 'which is' (line 23), then reads aloud the number on the document (line 23). The two then bring the sequence to a close, as Rute requests confirmation of her candidate understanding, then provided by Lia (lines 23-24).

Participants proceed through the document-presenting activity by treating a document at hand as a resource for obtaining relevant information on a specific bureaucratic

procedure. Yet, documents may in some cases be treated as problematic due to the technical ways in which information is contained. While a solution to this problem may reside in establishing a correspondence between what the document *reads* and what it *means* (e.g. by providing an oral explanation), professionals' concern with treating a documental source as central for obtaining relevant information may be pursued by coordinating oral descriptions and embodied practices for highlighting and sustaining visual focus on specific parts of the text.

## 5. Handling competing sources of documental information

Using documents for making sense of clients' situations becomes especially complex when many sources of information are available within the material environment so that participants have to inspect several options and find the most adequate. This can be observed in a next, final extract, where a client presents a document as containing incorrect information on her situation and contests the understanding proposed by the professional, who then solves the problem by showing evidence from another source, comparing and contrasting two written addresses. We join the action as, looking at a two-page electricity bill (whose payment was delayed by the reception of the document at a wrong location), social worker Lia advises client Rita to make a change in the information provided for receiving mail:

## Extract 5 (SWPT\_C14, 20.34)

1 LIA 'tão e porque é que não altera isto p'rá sua mora:da?  
so and why is it that (you) do not change this to your address?  
lia >>holds p1 on right hand-->  
lia >>holds p2 on left hand-->

2 porque senão assim vai andar sempre::=  
because otherwise like this (you.sg) will be always=

3 RIT =não mas (.) é engraçado€ (.) se reparar em cima  
=no but (.) (it) is funny (.) if (you) notice on the top  
rit €points to p1 w/ open hand-->

4 vem aí a minha morada. só que vai p'ra casa dela.  
there is my address. but it goes to her house.

5 ela deve ir é ao correio p'ra deixar=  
she must go to the post office for stopping=

6 LIA =rua da tapada número dezasseis€ é a sua mora:da?=  
=tapada street number sixteen is your address?=  
lia >>looks at p1€looks at RIT-->

7 RIT =nã:€o€. # é a outra€ que 'tá em ci:€ma.  
=no. (it) is the other that is on top.  
rit €, ,>  
rit -->€. ....€points w/ index-->  
lia -->€looks at p1-->  
lia €slides p1-->

8 (0.2)

9 RIT afqui\$:..  
here.  
rit ,,>€looks at p1-->  
rit -->€grabs p1-->

10 (0.9)∞(0.2)  
rit --->∞drags p1 onto table-->

11 LIA nãf:o. isto vai p'ra e\$sta mo\$rada aqui:.# (.)  
no. this goes to this address here. (.)  
rit -->€  
lia €, .....€points, holds p1 w pen tip-->  
im #Image 19

12 rua da tapa[:da:€  
tapada str[et€

13 RIT [a:h.  
[a:h] (it) is here.

14 LIA &número de€zasse\$:is.#  
&number sixteen.  
lia -->€looks at p2-->  
rit \$pulls p1 tw herself-->

15 RIT os advogados \$têm a minha, acho eu,# não tê:m?  
the lawyers have mine, i think, do (they) not?  
rit -->€holds p1-->

16 (0.5)

17 LIA €nã::o.€ aqui diz€ assi[:m,  
no. here (it) says li[ke,  
lia €turns doc2 sideways€  
lia €.....€points at p2-->

18 RIT [a:h] \$'tá €aqui.€\$#  
[ah] (it) is here.  
rit -->€places p1 on table\$  
rit €. ....€points at p1-->  
im #Image 20

19 lugar de consu€:mo.  
place of consumption.  
lia -->€. .>  
lia -->€looks at p2-->

20 (0.3)

21 LIA pro:€nto.# porque isto é a morada€ de consu:€mo.  
there. because this is the address of consumption.  
lia ...>€points at p1-----€,,>  
rit -->€  
im #Image 21



- 21 LIA pro:Ento.# porque isto é a morada de consu:mo.  
there. because this is the address of consumption.  
lia ...>points at p1----->,,>  
rit ----->  
im #Image 21
- 22 só que efla pediu p'ra que estas faturas  
but she asked for the invoices  
lia ..>points to p2-->  
rit -->looks at p2-->
- 23 fossem sempre pa' esta mora:da.#  
to arrive always to this address.  
lia -->looks at RIT-->  
lia -->,,>  
im #Image 22
- 24 RIT pois.  
right.
- 25 (0.2)>(0.2)  
lia -->looks at p2-->
- 26 LIA 'tá aqui, rua das pereirinhas.  
(it) is here, pereirinhas street.  
lia ,,>.....>points p2-->
- 27 só que vai tudo p'à rua da [ta#pa:da.  
but all goes to tapada str[et.  
lia ---->  
lia -->looks at RIT-->>
- 28 RIT [pois, (.)  
[right, (.)
- 29 como está em nome dela va:i (0.3) vai p'ra lá:.  
since (it) is on her name (it) goes (0.3) (it) goes there.
- 30 LIA pois, assim é um bocadinho confuso vocês conseguem controla:r.  
right, like that (it) is a bit confusing for you.PL to control.

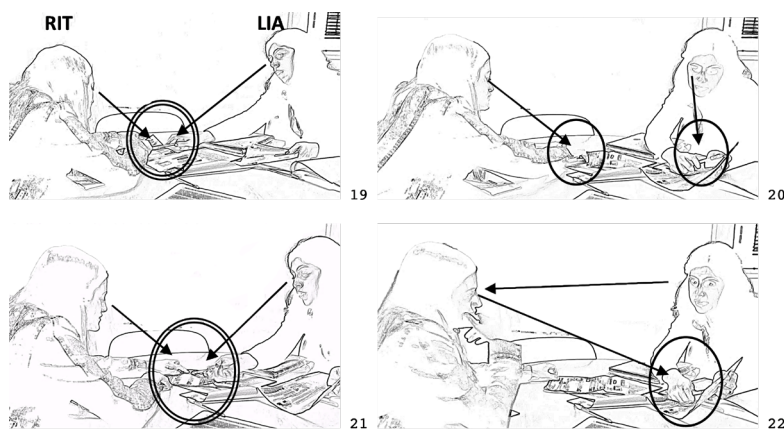


Figure 5

Holding the two-page document in her right hand, Lia topicalizes the fact that Rita's electricity bills are being received at the house of her landlord instead of hers (line 1). The client explains the situation and refers to another part of the sheet (lines 3-4), pointing to text in the page held by the professional, prompting its visual inspection. The social worker then reads aloud an address written on page one, requesting its confirmation by the client (line 6). The client disconfirms, and points to another part of the document containing another address – her own (line 7). Rita then grasps page one, places it on the table and points to the top of the paper for showing her address to the professional, referring to the relevant element and treating

it as visually accessible through the use of proximal deictic *aqui* (line 9). Lia disconfirms, pointing to another address elsewhere on the document (lines 11-13 and Image 19, Fig. 5). The client then grasps and reads the document, acknowledging a discrepancy between the two addresses (lines 13 and 15). After inspecting page two, still on her hand, the professional reads it aloud, pointing to it in order to show evidence to the client (line 17) who, pointing to page one, prepares to do the same (lines 18-19 and Image 20, Fig. 5). Lia then shows the existence of two different items (the *billing address* and the *consumption address*) and, pointing to the document held by Rita (Image 21, Fig. 5) and then to the one on her hand (lines 21-23 and Image

22, Fig. 5), explains the difference between the two items and the actual addresses assigned to each. The client acknowledges this information (lines 24 and 28) and Lia sums up the issue at stake, explaining its consequences (lines 26-30).

While the status of official documents as authoritative sources of information is largely undisputed in the encounters under study, the use of documented information for making sense of clients' situations depends upon participants' knowledge of documents at hand and, moreover, their ability to identify relevant elements in the text. When practical problems emerge in linking documented information to clients' circumstances, a key for managing this task can be found in social workers' ability to coordinate between inspecting and showing different documents and texts and explaining their differentiated functions and practical consequences.

## 6. Concluding remarks

This paper has investigated how presenting documents to clients takes place in Social Work encounters, as professionals inform clients about bureaucratic procedures on the basis of documental evidence and, moreover, ensure that they are able to read it themselves. A detailed analysis of selected extracts has shown how, by presenting documental sources as authoritative evidence for bureaucratic procedures and making them available for clients to read, professionals legitimate and enact the transparency of institutional rules.

Social workers treat documents as central to the management of clients' concerns: in order to ensure clients' access to and understanding of documented information, they place documents at the center of the *interactional space* (Mondada, 2013) and, through multimodal practices organized around the concomitant interplay of talk and bodily conduct, describe the information contained therein, prompting its joint inspection. Diverse linguistic practices are mobilized by professionals for referring to documents and specific information, e.g. glossing written text or providing lay descriptions in order to explain the functions and consequences of prescribed procedures, referring to the immediate availability of relevant visible elements (e.g. by reading aloud or through proximal deictic *aquí* / 'here'). Bodily practices for granting clients' access to objects and texts include the (re)positioning papers so that clients may visually inspect and/or grasp them, as well as *environmentally-coupled gestures* (Goodwin, 2007) whereby specific visible elements are highlighted within a document at hand, displaying orientation to its relevance and prompting clients' inspection.

Professionals' practices for referring to and prompting clients' attention onto visible and tangible documents is grounded on participants' shared, mundane knowledge on how to handle and inspect paper objects and read textual inscriptions and, therefore, is not specific to the professional exercise of Social Work. Yet, such practices are not casual ones, because the information contained in those documents is of fundamental importance to guarantee that those citizens successfully accomplish the very first step towards attaining the service sought. Such concern is orchestrated through social work-

ers' skillful orientation to ensuring clients' access to official information on the basis of documental sources and, moreover, by making specific inscriptions interactionally-salient (e.g. by reading aloud, glossing, explaining, highlighting). By handling documents and written texts in those particular ways, social workers are able to differentiate, within several bureaucratic documents, which ones and which specific information in them cannot be left unattended.

Whereas the document-presenting activity may unfold seamlessly (**Extracts 1-2**), with clients' aligning with professionals' prompts through silent inspection of papers or minimal acknowledgements, some practical problems may occur due to contingent troubles in professionals' visual inspection of papers and texts (**Extract 3**), orientation to other tasks (**Extracts 4.1-4.2**), or due to the existence of other, concurrent sources of information (**Extract 5**). Further practices may then be mobilized for managing practical problems in presenting documents, such as suspending the progressivity of the presenting activity in order to carry out an individual inspection of a document at hand (**Extracts 3 and 5**) or describe some element in other words so that it is understood by recipients (**Extracts 4.1-4.2**). Such cases may occasion explicit orientations from both parties to issues of knowledge, access and ownership: in this respect, **Extracts 4 and 5** shed some light on how participants treat documents provided by professionals and/or belonging to the institution vis-à-vis those pertaining to clients and/or brought by them to the encounter.

Focusing on participants' mobilization of talk, bodily conduct and object use, the multimodal EMCA analysis offered in this study reveals the situated accomplishment of social workers' concern with ensuring clients' informed participation and socialization into bureaucratic procedures and institutional routines. Such approach promotes an appreciation of the document-presenting activity as a perspicuous setting for investigating the socio-interactional and eminently embodied organization of *situated literacies* (see Barton et al., 2000) and how documents are treated by participants as *artifacts of knowledge* (Riles, 2006). The detailed examination of how social workers present documents to clients provides vivid evidence of the interplay between orality and literacy within Social Work (see Tsang, 2007) and how they are locally managed in and through social interaction, hence providing for an embodied *respecification* (see Garfinkel, 1991) of literacy in Social Work.

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## **APPENDIX**

### **Transcription conventions**

Talk was transcribed using Jefferson's (2004) conventions; original talk (in Portuguese) appears in bolded face and is preceded to the left by line number, and its translation in English appears immediately below, in italic face. Multimodal annotations follow Mondada's (2018a) conventions (<https://www.lorenzamondada.net/multimodal-transcription/>).

[	Overlap onset
]	End of overlap
=	Connects two latching lines of speech
&	Connects two otherwise contiguous lines of talk from a same participant which are separated by a line of overlapping talk from another participant
.	'Final', falling phrasal intonation
,	'Continuing' or very slightly rising phrasal intonation
?	Rising phrasal intonation
°text°	Decrease in volume in relation to surrounding talk
:	Lengthening of a sound (longer lengthenings are annotated :: or :::)
wor-	Word is cut-off
wor'	Word is elided
(1.0)	Stretch of time without speech (measured in tenths of second)
(.)	Micropause (less than 0.2 seconds)
\$action\$	Delimits a description of a participant's embodied action
\$action-->	Action continues across subsequent lines until same symbol is reached
>>action	Action begins before transcript begins
action-->>	Action continues after transcript ends
...	Action's preparation or initiation
---	Action's full extension and maintenance
,,,	Action's retraction or return
NAM	Identifies current speaker
nam	Identifies participant whose visible conduct is transcribed
!m	Identifies screenshot image
#	Locates place in speech where screenshot image was taken