Introductory & Assessment Meetings Checklist

PURPOSE: To begin building a relationship with the participant and identify the new participant’s needs and goals.

- “Getting to know you” – demonstrate a supportive, nonjudgmental approach and begin building trust
- Discuss educational and employment histories, health/mental health and needs of all family members
- Conduct baseline assessment
- Identify needs
- Identify goals
- Complete ITSP
- Complete Contract of Participation
- Make referrals