

# Outreach and Engagement Checklist

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**Client:**

**ES:**

**Supervisor:**

a. Called and left a voicemail for client.

Date:

Result:

Date:

Result:

b. Mailed a letter to client.

Date:

Result:

Date:

Result:

c. Called a family member or friend (w/ROI)

Date:

Result:

d. Visited the person's home (along with another treatment team member.)

Date:

Result:

e. Visited areas of the community where the person tends to go (coffee shop, park, etc.) Be careful about approaching if the person is with other people, due to confidentiality.

Date:

Result:

f. Visited or called the person's employer, if employed and there is an ROI.

Date:

Result:

g. Attempted to join meeting with the client's therapist or case manager, or meet with client immediately after a group or meeting. Date: Result:

h. Spoke with treatment team, therapist, case manager, or peer specialist and gathered information regarding reasons behind lack of engagement and recommendations for following up with the client.

Date:

Result:

Date:

Result:

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*Staffed above engagement and outreach attempts with supervisor on approved to be sent.      **OR***

*and final letter was*

*Staffed above engagement and outreach attempts with supervisor on recommendation is: .*

*and supervisor*

Employment Specialist Signature

Date

Supervisor Signature

Date