

# Intake and Engagement



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During the early phases of the helping process, the social worker seeks to build a connection with the client. Through the intake and engagement process, the social worker strives to develop a rapport with that client that will help to facilitate the client's commitment to work together on problem resolution. This chapter explores the many dimensions, dynamics, and necessary skills for successfully completing the intake and engagement processes.

## THE INTAKE PROCESS

The **intake process** is the initial step in developing a relationship with a client. First impressions are made as you venture forward. During those awkward first few minutes, both the client and social worker are taking stock. Introduce yourself, share information about your experiences, and provide a short description of your role and function within the agency setting. Of importance is sharing with the client information about confidentiality, the helping process, the type of treatment or services offered, and what he or she can expect as a result of entering services. If there is a need to get a release of information signed or a referral (see example in the Appendix C) to be made, you can do so during the intake portion of the interview.

## LEARNING OUTCOMES

- Identify essential information to be included as part of the intake process.
- Illustrate ways to manage all aspects of the first client contact, from intake through signs of successful engagement with the client.

## CHAPTER OUTLINE

### The Intake Process

Engagement and the Professional Relationship

Understanding Empathy and Rapport Building

Countertransference

Distinguishing between a Friendship and a Professional Relationship

Self-Awareness

Developing Your Personal Style

### Meeting the Client

Preparing for the First Meeting

The First Face-to-Face Office Meeting with the Client

The First Home Visit and Beyond

Signs of Successful Client Engagement

Summary