**Case Presentation for Engagement**

**1. Choosing a Case**

The quality of the alliancewith the patient determines the patient outcome. There are three key factors to consider: the provider-patient bond, agreed upon goals and agreed upon tasks.

**Engagement Steps**

* Elicit the story = understanding, summary of pros/cons to tx
* Elicit treatment hopes and dreams
* Feedback = psychoeducation
* Barriers: practical, psychological, cultural
* Elicit commitment

**What client should I think about to practice Engagement Skills with?**

Look at your caseload in the registry as the registry can help you identify potential candidates.

To choose a client(s) for your case consultation, think about someone on your caseload who you know has struggled with one of the following:

* Difficulty completing the intake assessment,
* Difficulty making scheduled appointments
* Difficulty goal setting
* Difficulty agreeing on tasks or follow through
* Poor bond

You can pick a successful case or one that has been challenging for you!

We want you to try Part 3 but don’t worry if you can’t fill in all the details or plan!

1. **Prepare Case Presentation**

Complete the following for the patient you’ve chosen.

Age:

Gender:

Diagnoses:

Basic demographic info (no PHI or information that could inadvertently identify a patient - please!). For example, living situation, stressors, strengths, factors affecting treatment course / outcome.

PHQ-9 at Baseline:

Most recent PHQ-9:

Length of time in treatment (# weeks or months):

Diagnoses, treatment goals:

Treatment:

Medications: If medication is part of treatment plan, what is current dose and regimen? Was dose adjusted during the course of treatment? Is medication helping?

Psychotherapy and other therapeutic interventions: What psychotherapy interventions (e.g. behavioral activation) are part of the treatment plan? Which, if any, have been helping?

1. **Apply the Engagement Strategy:**
2. Assess your alliance:
   1. Bond? (how well do they feel liked and accepted by you?)
   2. Agreed goals?
   3. Agreed tasks?
3. Assess the patient readiness to change (engage treatment)? (not ready vs. on the fence vs. ready)
4. Consider the engagement strategy:
   1. Elicit the story = understanding, summary of pros/cons to engaging treatment
   2. Elicit treatment hopes and dreams
   3. Feedback = psychoeducation
   4. Barriers: practical, psychological, cultural
   5. Elicit commitment