Meeting with a Client

First Visit with a New Client:

1. ❏ Introduce yourself and the agency you work with.
2. ❏ Explain peer education and who you are.
3. ❏ xplain confidentiality.
4. ❏ Get verbal/written consent from client to begin helping her as a peer.
5. ❏ Ask open-ended questions about the client's needs and listen.
   - ❏ Seek information from client regarding her situation.
   - ❏ Seek information on client's health behaviors (ex. Is she taking mediations, has a doctor, safer sex, drug use, etc)
   - ❏ What are barriers present in client's life?
   - ❏ What are resources available in client's life?
   - ❏ What are client's immediate needs? What can peer do for the client?
6. ❏ Provide emotional support and find a way to connect.
7. ❏ Fill out necessary paperwork.
8. ❏ Set priorities or goals for next meeting.
9. ❏ Set up next meeting time (crucial!).

Tasks for Peer Before Next Visit with Your Client:

1. ❏ Search for appropriate referrals for client's needs.
2. ❏ Communicate with referral source and coordinate services if necessary.
3. ❏ Follow-up with the client regarding referral.

At the Next Meeting with Your Client:

1. ❏ Check-in with client regarding referrals and last meeting.
2. ❏ Follow through with support and addressing needs.

Things to Remember:

Recognize own need for support from supervisors, co-workers and others.

Recognize your need for self-care and personal reflection.

You may not follow these steps in this order but make sure to cover ALL the steps.