

Stages of Social Work Process

7-Step Process for Social Work
Client Engagement

Contact us any time with questions
at: socialworkportal.com/contact-us

 Social Work Portal



Social Work Process (7-Steps)

This process is designed to be flexible enough to use for many different types of social work interventions.

1. Interview

Interview the client and any other relevant parties to gather subjective information about their situation.

2. Research

Research any history of the individual in your organization's database or files or those of partner organizations.

3. Assess

Review the subjective and objective information you've gathered and write your assessment of the situation.

4. Create Plan

Based on your assessment, create a step-by-step care plan for the client, including desired outcomes.

Get an online task checklist of this process: <https://www.socialworkportal.com/free-templates/#Free-Social-Worker-Checklist>

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5. Implement & Monitor

Work with the client, referral agencies, and members of the care team to implement the plan and monitor progress.

6. Review

Once the care plan is complete, review the outcome and make recommendations for continuation or termination.

7. Terminate Plan

Conduct exit interview, transition the client to self-sufficiency or another agency, and terminate the care plan.

Additional Step, if needed

If applicable, follow up with client to keep them on a positive path to overcoming their problem.

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