

Social Work Tasks Checklist

#  General Workflow Checklist for Social Work Client Interventions

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|  | Workflow Phase | Task |
| □ | (1) Interview | Intake: Gather individual's basic information, full name, address, contact details, etc. |
| □ | (1) Interview | Ask situation related questions, such as "What brought you here today?" |
| □ | (1) Interview | Ask safety related questions, such as "Are you in immediate danger of physical harm?" |
| □ | (1) Interview | Ask needs related questions for a needs assessment. Such as, "What are your biggest concerns in the coming week?" |
| □ | (1) Interview | Ask support-related questions, such as "What resources do you have that you can rely on? |
| □ | (1) Interview | Ask urgency-related questions to help you prioritize assistance, such as "What will happen tomorrow if you haven’t yet resolved this today?" |
| □ | (1) Interview | Have the individual take a self-assessment survey (such as a GAD-7, PHQ-9, Psychosocial Assessment, etc.) |
| □ | (1) Interview | Gather Information from the individual's family members (if applicable). |
| □ | (2) Research | Look for any history on the individual in your organization's database or files. |
| □ | (2) Research | Research the individual in government or other agency databases. |
| □ | (2) Research | Contact agencies that the person stated they have visited/received help from during their interview. |
| □ | (3) Assess | Conduct necessary client assessments (for example: Genogram and ecomap to identify positive and negative relationships, a culturagram, substance abuse assessment, etc.) |
| □ | (3) Assess | Review interview notes to begin drafting an assessment of the individual's current situation. |
| □ | (3) Assess | Review all assessment surveys you gave the individual to flesh out your social work assessment. |
| □ | (3) Assess | Review information you've been able to find during your research of other agencies or your own organization's database. |
| □ | (3) Assess | Write your assessment report, including your objective diagnosis of the client’s issue. |

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|  | Workflow Phase | Task |
| □ | (4) Create Plan | Prioritize the individual's needs according to urgency. |
| □ | (4) Create Plan | Match individual's needs with internal & external resources. |
| □ | (4) Create Plan | Match individual's needs with the supports/opportunities identified during the social work assessment. |
| □ | (4) Create Plan | List out resources and contacts that need to be made to fulfill needs in order of most urgent priorities first. |
| □ | (4) Create Plan | Write up your recommendations and create a care plan / intervention plan for the individual. |
| □ | (4) Create Plan | Create a list of tasks for the Social Worker to accomplish to carry out the plan. |
| □ | (4) Create Plan | Create a list of tasks, goals, milestones (if applicable) for the client to accomplish to carry out the plan. |
| □ | (4) Create Plan | Finalize your care plan and recommendations. Present to the appropriate parties for approval (if applicable). |
| □ | (5) Implement & Monitor | Present and explain the care plan to the individual. |
| □ | (5) Implement & Monitor | Implement the identified tasks that the Social Worker needs to accomplish to carry out the plan. |
| □ | (5) Implement & Monitor | Explain tasks that you've assigned to the individual to ensure they understand what they need to do. |
| □ | (5) Implement & Monitor | Follow-up with individual on their tasks to keep them on track. |
| □ | (5) Implement & Monitor | Carry out the client engagement and continue monitoring the plan implementation to help secure success |
| □ | (6) Review | Review engagement success against targets, goals, or other measures of success. |
| □ | (6) Review | Identify successes and areas with room for improvement to inform future care plans. |
| □ | (6) Review | Complete and submit a final review of the individual's care plan. |
| □ | (7) Terminate Plan | Conduct an exit interview for individual to transition them to self-sufficiency or to another care agency. |
| □ | (7) Terminate Plan | Close out care plan once engagement is complete and file appropriate paperwork. |