Social Worker Tasks Checklist

General Workflow Checklist for Social Work Client Interventions

Interview → Research → Assess → Create Plan → Implement & Monitor → Review → Terminate Plan

	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.

	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.