A black background with white letters

AI-generated content may be incorrect.

**[Get Your Free Case Management Software](https://www.socialworkportal.com/all-in-one-case-management-tool/)***(Free Trial. No Credit Card Needed)*

**Social Services Needs Assessment Checklist**

Use this checklist during client intake, case reviews, or community outreach to identify and document a person’s or family’s social service needs. Each section represents a common focus area in social services. Check all that apply and document follow-up actions as needed.

## 1. Basic Needs

* [ ] Food insecurity / needs food bank referral
* [ ] Inadequate clothing or seasonal wear
* [ ] Access to hygiene supplies (soap, toothbrush, diapers, etc.)
* [ ] Access to clean drinking water

## 2. Housing & Shelter

* [ ] Homeless or at risk of eviction
* [ ] Living in unsafe or overcrowded conditions
* [ ] Needs emergency shelter referral
* [ ] Needs transitional or long-term housing support

## 3. Financial Support

* [ ] Unemployment or underemployment
* [ ] Needs income assistance / cash benefits
* [ ] Needs utility or rent assistance
* [ ] Needs help applying for SNAP/WIC

## 4. Family & Child Welfare

* [ ] Child protection concern or history of involvement
* [ ] Needs parenting classes or support
* [ ] Needs childcare referral or subsidy assistance
* [ ] Domestic violence concern or safety planning required

## 5. Health & Mental Health

* [ ] Lacks access to healthcare / uninsured
* [ ] Chronic physical health issues
* [ ] Mental health concerns (anxiety, depression, etc.)
* [ ] Needs therapy or behavioral health services

## 6. Education & Employment

* [ ] Needs adult education / GED support
* [ ] Needs job training or employment placement
* [ ] Needs school supplies or uniforms for children
* [ ] Needs transportation for school/work

## 7. Disability & Aging Services

* [ ] Client has disability and needs support services
* [ ] Needs home care, in-home support or assistive devices
* [ ] Senior services needed (e.g. Meals on Wheels, case aid)
* [ ] Caregiver support or respite care required

## 8. Legal & Documentation

* [ ] Needs help with legal services (immigration, custody, etc.)
* [ ] Lacks key documents (ID, birth certificate, etc.)
* [ ] Needs help navigating court or probation services

## Next Steps / Referrals

Document all referrals made, follow-up dates, and any additional notes here: <https://www.socialworkportal.com/social-work-case-management-software/>

View our website for more helpful guides: <https://www.socialworkportal.com/>