
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/>
