

Homeless Assistance Intake & Case Note Template

Social work case note templates like this one can be difficult to fill out without context. Below you'll find a set of prompts to guide you in using this template.

Chief Complaint / Presenting Problems: Do they need temporary shelter, permanent housing, or transitional housing services? Are they experiencing financial or food insecurity? Do they have any physical or mental health concerns? Are they currently safe?

Clinical Observations: Is the client well-groomed? Are they behaving as though they are afraid? Remain entirely objective when summarizing the client's appearance and behavior.

Referral Information: Which organization referred them to your office, and have any other referrals been made?

Demographics: What is their age, sex, and race? Are they married or single?

Living Situation: Are they currently staying at a shelter? How long have they been experiencing housing insecurity? Have they ever been evicted?

Household Members: Does anyone else currently live with them?

Education / Employment / Income: What is their highest level of education? Past and current employment? How much do they make per week?

Finances: What are their expenses? Are they receiving any government assistance?

Support System: Do any family members or friends help them financially? Does the client have a person or people to turn to for guidance or emotional support?

Mental Health: Have they received a mental health diagnosis in the past? Have they ever experienced suicidal or homicidal ideations? Have they ever been hospitalized or received mental health treatment? If so, when? Some social workers may conduct additional assessments to evaluate a client's mental health, such as the Patient Health Questionnaire (PHQ).

Physical Well-Being: Does the client have a primary care provider? Are they insured? What medical conditions are they receiving treatment for currently?

Substance Use: Do they smoke, use drugs, or alcohol? Have they ever received inpatient treatment for substance abuse?

Criminal History: Have they ever been charged with a felony or misdemeanor? Do any legal encounters appear on their record?

Strengths: Based on this information, what positive criteria can the social worker leverage?

Needs: Do they need immediate housing assistance, employment services, case management, food stamps, childcare, or other services that the case worker can connect them with?

Client Goals: Social workers order these in order of importance to the client. These are often listed as direct quotes summarizing the subjective needs of the client.

Staff-Identified Goals: A social worker may aim to obtain housing and employment within a specific timeframe.

Notes about Session Discussion: Was anything critical discussed that did not fall into the above criteria?

Case Management Services Provided: What actions were taken to assist the client, and when were they executed? When are services expected to be provided if they are still pending?

Follow-Ups: When is the social worker's next meeting with the client, and what needs to occur before then?

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Living Situation: _____

Household Members: _____

Education / Employment / Income: _____

Finances: _____

Support System: _____

Mental Health: _____

Physical Well-Being: _____

Substance Use: _____

Criminal History: _____

Strengths: _____

Needs: _____

Client Goals: _____

Staff-Identified Goals: _____

Notes about Session Discussion: _____

Case Management Services Provided: _____

Follow-Ups: _____