Client Intake & Housing Needs Assessment Toolkit

The Housing Specialist™ — Housing Made Possible

Educational worksheet. Actual confidential client records must remain in approved case-management systems.

1. Preparing for Client Intake

Before the meeting:

■ Review available information without assuming facts
■ Confirm privacy and confidentiality boundaries
■ Prepare to explain my role clearly
■ Consider accessibility or language needs

How I will explain my role to the client:

_____

2. Housing Needs Assessment

Area	Client Information / Preferences	Notes
Household composition		
Current housing situation		
Preferred locations		
Affordability considerations		
Urgency level		
Accessibility needs		

3. Barriers and Support Needs

Identified barriers:

_____

_____

Client strengths or supports:

_____

Possible referrals needed:

_____

4. Documentation and Program Verification

Documents discussed or requested:

_____

Program requirements to verify with official sources:

_____

Notes on next verification steps:

_____

5. Collaborative Housing Action Plan

Next Step	Responsible Party	Target Date

Follow-up date agreed: _____

6. Quality Review

What went well in this intake conversation?

_____

What could be improved next time?

_____

Any information that needs supervisor review?

_____