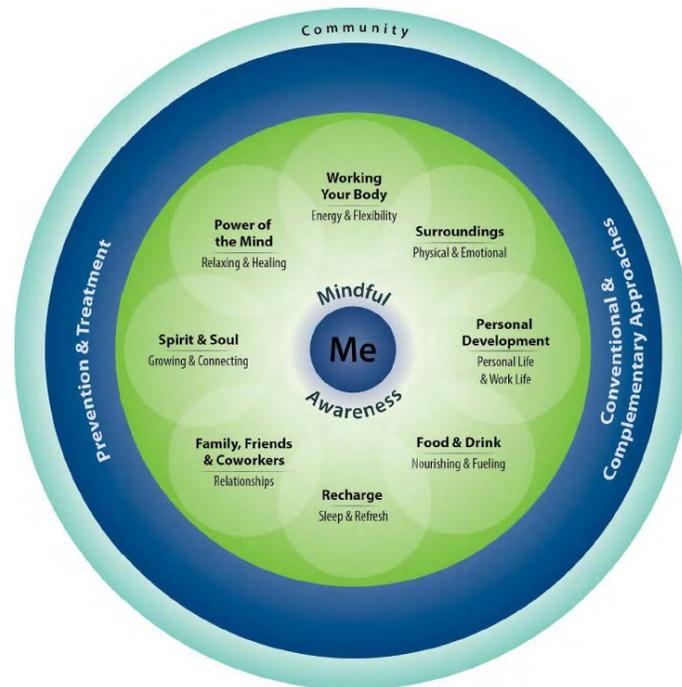


# WHOLE HEALTH: CHANGE THE CONVERSATION

Advancing Skills in the Delivery of  
Personalized, Proactive, Patient-Driven Care

## Spiritual Assessment Tools Clinical Tool



This document has been written for clinicians. The content was developed by the Integrative Medicine Program, Department of Family Medicine, University of Wisconsin-Madison School of Medicine and Public Health in cooperation with Pacific Institute for Research and Evaluation, under contract to the Office of Patient Centered Care and Cultural Transformation, Veterans Health Administration.

Information is organized according to the diagram above, the *Components of Proactive Health and Well-Being*. While conventional treatments may be covered to some degree, the focus is on other areas of Whole Health that are less likely to be covered elsewhere and may be less familiar to most readers. There is no intention to dismiss what conventional care has to offer. Rather, you are encouraged to learn more about other approaches and how they may be used to complement conventional care. The ultimate decision to use a given approach should be based on many factors, including patient preferences, clinician comfort level, efficacy data, safety, and accessibility. No one approach is right for everyone; personalizing care is of fundamental importance.

# WHOLE HEALTH: CHANGE THE CONVERSATION

## Spiritual Assessment Tools

### Clinical Tool

This clinical tool focuses in more depth on the variety of tools you can use to do a spiritual assessment. Of all the components of proactive self-care in the green portion of the Circle of Health, Spirit and Soul is perhaps the area where gathering information can be the most daunting for many clinicians. Having a template or mnemonic to follow, or something to remind you of key aspects of a person's spirituality, can make this easier.

As noted in the **Spirit and Soul** educational overview, the goals of taking a spiritual history should include:<sup>1</sup>

- Learn (and share as appropriate) about spiritual and religious beliefs
- Assess level of spiritual distress or help them draw upon their strengths
- Provide compassionate care
- Assist with finding inner resources for healing and acceptance
- Determine spiritual/religious beliefs that could affect the treatment choices
- Identify whether or not someone needs a referral to a chaplain, clergy, or other spiritual care provider

### Popular Mnemonics

To guide clinicians with lines of inquiry regarding spirituality, a number of assessment tools have been created. These include an array of mnemonics, including FICA,<sup>2</sup> HOPE,<sup>3</sup> and SPIRIT,<sup>4</sup> which were ranked among the best of 25 different assessment scales assessed in a 2013 systematic review.<sup>5</sup> FICA was used in the Spirit and Soul educational overview, but there are many others.

#### **FICA reminds clinicians to ask about:** <sup>2,6,7</sup>

- **F**aith and Belief – the things that help a person cope with stress and bring meaning to life
- **I**mportance – how belief affects self-care
- **C**ommunity – role of a spiritual community in a person's life
- **A**ddress in Care – how the care team should address concerns

*Note that the creator of this mnemonic, Dr Christina Pulchaski, strongly recommends that people receive training prior to using these questions.*

#### **HOPE focuses on:**<sup>3</sup>

- **H**ope – what provides hope
- **O**rganized religion – is one in a community and is that helpful
- **P**ersonal spirituality/practices
- **E**ffects on health care needs and end of life choices

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**SPIRIT** emphasizes:<sup>4</sup>

- **S**piritual belief system
- **P**ersonal spirituality
- **I**ntegration with a spiritual community
- **R**ituals and restrictions spirituality requires for health care
- **I**mplications of spirituality and religion for medical care
- **T**erminal events planning (end-of-life issues)

**A Mnemonic for Veterans: I AM SECURE**

The “I AM SECURE” mnemonic was developed specifically for the Whole Health course, drawing subject matter for many of its questions from multiple different spiritual assessment tools, including the three listed above. The first item is directly related to a person’s having been in the military. (For example, see the **Posttraumatic Stress Disorder (PTSD)** educational overview for information about the ways combat can cause wounds.)

<b>Table 1. The I AM SECURE mnemonic</b>	
<b>Item</b>	<b>Sample Questions and Comments</b>
<b>I</b> mpact of military service	Did your experiences in the military affect your spiritual or religious beliefs? If so, how? This may bring up issues related to moral injury, an important topic in the treatment of PTSD.
<b>A</b> pproach to your spirituality in a medical setting	How do you want members of your care team to approach this topic? Do you prefer that they bring up spirituality and religion, or would you rather they did not?
<b>M</b> eaning in life	What gives you your sense of meaning and purpose? What really matters to you? What are your guiding principles? Of course, this ties into the fundamental questions related to the Whole Health approach. What do you want your health for?
<b>S</b> pirituality – definitions and practices	What does spirituality mean to you? What are your most important beliefs and values? If spiritual practices are a part of your life, describe what those practices are and how they are linked to your health. This can often be a useful topic when a person does not have a specific religious affiliation.
<b>E</b> ase – sources of peace	What gives you ease? What helps you through when times are hard? What gives you hope or peace of mind? This question draws on the potential connection between mindful awareness, contemplation, and prayer, to spirituality.
<b>C</b> ommunity	Do you belong to a specific faith community or religious group? Not everyone will, but the answer to this question can have a significant effect on health

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	care beliefs and wishes.
<b>U</b> nderstanding of why this is happening	What do you believe is the cause of your health problems? Why do you think this is happening? Answers to such “why” questions can often give you a clue into potentially helpful health planning steps
<b>R</b> ituals, practices, and ceremonies	Are there specific activities or ceremonies you would like to have arranged during hospital stays, or any beliefs that will affect how we take care of you? (Examples might include refusing blood transfusions, eating kosher, or wanting to fast for Ramadan.)
<b>E</b> nd of life	What are your perspectives on death? How do your beliefs affect your decisions about end-of-life issues? A discussion of code status might also be relevant here.

### Tips for Using Spiritual Assessment Tools

You are encouraged to choose a framework and come to know it well. Create your own, if you prefer. Practice using the framework, as appropriate, whenever you are exploring spirituality with your patients.

Some other tips for using spiritual assessment tools:

- Experiment with a few and then choose one that you most prefer to bring into your practice.
- You can have another member of a team do the assessment in advance of your seeing the patient
- Consider asking a chaplain for guidance and support. See the **Collaborating with Chaplains: Frequently Asked Questions** clinical tool.
- When you are discussing the Spirit and Soul component of the Circle of Health, assessment tools can provide information to guide both the direction you take the conversation and what you choose to incorporate (or not) into the Personal Health Plan (PHP).

If your time is limited and you only have time to ask one specific question about spirituality, consider one of the following:

- **Are you at peace?**<sup>8</sup> This question has been found in the research to be a useful means for determining if someone is in spiritual distress.

Another widely used, though perhaps not so thoroughly researched, question to consider asking is:

- **What gives you your sense of meaning and purpose?** Or put another way as it is in the first question in the Personal Health Inventory, **What really matters to you in your life?**

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Often, these questions not only take you to the heart of the core beliefs that define who they are, but it also gives you a strong sense of their “Whole Health Mission,” the goal or aspiration that explains their reasons for wanting to be healthy in the first place.

#### Whole Health: Change the Conversation Website

Interested in learning more about Whole Health?  
Browse our website for information on personal and professional care.

<http://projects.hsl.wisc.edu/SERVICE/index.php>

*This clinical tool was written by J. Adam Rindfleisch, MPhil, MD, Associate Professor and Director of the Academic Integrative Medicine Fellowship Program, Department of Family Medicine, University of Wisconsin-Madison School of Medicine and Public Health, and Assistant Director and faculty for the VHA Whole Health: Change the Conversation clinical program.*

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