

Geriatric Biopsychosocial/Spiritual Assessment Outline

Basic Demographic: (age; gender identity, names and pronouns; ethnicity/race, language(s), marital status, educational background)

Referral Information: presenting problem & reason for referral

Social: [relationships within family, social/diversity groups, and community]

- Personal and family history (work history, background, immigration, children, family of origin, family of choice)
- Current relationships with family, friends, social/diversity groups, community, caregiver (Zarit Burden Interview)

Financial: [ability to provide basic needs & access health services]

- Ability to provide basic needs: housing, food, shelter, clothing
- Health insurance- does it provide essential benefits, is the coverage adequate (are there any gaps in coverage, are co-pays & any out of network fees manageable), medication coverage
- Income sources- Social Security, pension, SSDI, SSI, savings, investments, family support, employment, general relief, food stamps

Environmental: [Personal safety, maintenance of residence, and safety of community]

- Current social context/environmental
- Neighborhood safety
- Home safety (smoke & carbon monoxide detectors, fire extinguisher, lighting, removal of slip rugs, shower & toilet accessible; elevators, stairs, ramps to access home)
- Access to guns (are guns locked in a safe)
- Screen for Abuse or Neglect by self or perpetrated by others (APS SOC341 report if suspected) [mandated reporting]

Physical: [individual function & disease morbidity]

- Health literacy, self-rated health & advance directive (is there a document, when last updated), knowledge on diagnosis(es), medications (& adherence), functional health (ADLs, IADLs), current treatment(s) for chronic or life threatening illnesses, sexual health

Mental: [mental status, depression, anxiety, and substance abuse]

- Standardized screening instruments: mini mental status exam, SLUMS, Montreal cognitive assessment, geriatric depression scale, GAD7 (anxiety), PHQ9 (depression)
- Suicide risk assessment (does or does not endorse suicidal ideations; consider intent, plan, and means) (Columbia Suicide Severity Rating Scale)
- Homicidal ideations (rule out or initiate Tarsoff duty to warn, mandated reporting)
- Substance Use (WHO ASSIST V3 assessment) Alcohol (AUDIT assessment)

Cultural/Spiritual: [understanding of disease and illness, complimentary & alternative medicine, spiritual beliefs & values](FICA assessment)

Strengths: [identify client strengths] [internal and external]

Formulation/Evaluation: [identified biopsychosocial/spiritual needs]

Treatment Planning: [in consult with interprofessional team]

Community Resource Needs: [appropriate home and community-based services to meet identified needs]