

Introduction to Spiritual Assessment and Documentation of Spiritual & Religious Care



Knowing how to conduct a Spiritual Assessment and document spiritual care interactions with clients is an important part of ministry and a standard expectation within Salvation Army social service ministry units.¹ As you implement spiritual assessments you will find that they are:

- A point of connection for holistic care.
- Ensure spiritual care planning for client wellness that leads to transformation.
- A part of interdisciplinary team work within the Ministry Unit.

When an assessment of the client's spiritual need is completed you are giving yourself, as the spiritual care provider, opportunity to assess how you can support spiritual development in your client. In Salvation Army terms you are reviewing how you can accomplish mission.

Spiritual Assessment is a look into the individual's spiritual history to evaluate how their spirituality and/or faith can impact the care being given within the ministry unit. A spiritual assessment is not to be done in a formal question and answer or interview style, but show flow as a conversation or directed dialogue.

Some basic formulas for spiritual assessment as directed dialogue have been adapted for use in Salvation Army Ministry Units are noted on the next pages. Please find the method that is most appropriate for use in your ministry.

¹ The following are part of the Social Services Accreditation – Chapter 4: Spiritual & Religious Care which highlights assessment expectations.

4.5.1 – The spiritual & religious care program will have a process that provides opportunity to review with each client their spiritual & religious care needs and strengths. There shall be evidence that individual needs are being assessed, including: spiritual history, faith/spirituality, community of support, spiritual practices to be maintained.

4.6.1 – The ministry unit shall maintain a client/record/file on all persons. Documentation of spiritual & religious care provided shall exist and be included in the client record/file. Where spiritual & religious care is delivered in a short term or occasional opportunity basis, interactions and outcomes should be documented in a log format.

Spiritual History Formulas for Directed Dialogue

1. F – I – C – A , Dr. Christine Pulchulski, www.gwish.org
2. 4 C's , Dr. David Morrison – PEI Cancer Centre
3. F.I.N.D., M. Bernadine Parks, Director, Pathways of Hope
4. A.C.S.I. , Dr. Gloria Woodland, ACTS Seminary

F – faith/spirituality <i>Do you have a faith, spiritual belief that is important to you? Now or in the past? e.g. if not now, they may have been involved in Sunday School as a child – or known of the faith of their Grandmother.</i>
I – importance <i>Is faith/spirituality important to them now? How might it influence their recovery or care while in The Salvation Army Ministry Unit? e.g. – if not now important and they once felt it important or saw how faith was important to Grandmother can faith's importance be drawn on again?</i>
C – community of support <i>Do you have people who support you? (who is on the client's side as they journey through life?) For some clients the only support they may have is the AA or NA group, the Social Worker or YOU.</i>
A – assist you <i>How can we assist you with meeting your spiritual/faith needs while you are with us? -this is where you could begin with expressing availability of chaplain, or offer of prayer...</i>

C – coming <i>How do you feel about coming – or having to come to a Salvation Army Centre? – adjust question to fit your ministry environment.</i>
C – coping <i>How are you coping – with coming or with the issues of life that brought them to you?</i>
C – comfort (sources of) <i>What are your sources of comfort at this time? – in the past? - could they help in this situation or can you as Chaplain offer a new source of comfort?</i>
C – community of support <i>Do you have people who support you? (who is on the client's side as they journey through life?) For some clients the only support they may have is the AA or NA group, the Social Worker or YOU. – Referrals to others...</i>

F – Faith – client's self-definition.
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<p><i>Is the client spiritual, religious, curious or questioning their faith? What is meaningful for them? What is the client's belief system? Do they have any religious or spiritual affiliations – historically or presently?</i></p>
<p>I – Importance of Beliefs <i>What impact does the client's belief have on their present situation/ circumstances? = comfort/distress hope/guilt, anxiety? Do they have a personal spiritual/religious practice that needs to be maintained while in care? How will belief impact decision making?</i></p>
<p>N – Networks <i>Who is the person closest to them that will provide emotional and social support? Who provides spiritual support? What are challenges to, or discord /discomfort with networks of support? What are strengths of a client's network</i></p>
<p>D – Define <i>What is really going on – the problem? Interventions to be taken or recommended? beginning of spiritual care plan ...</i></p>

<p>A – Affiliation <i>Has the client any affiliation with a faith/spirituality/ religion? Now or in the past? Can this be used in any way to support them in their current situation?</i></p>
<p>C – Coping <i>How is the client coping with the life situation they are currently in or facing?</i></p>
<p>S – Social Supports <i>Who or what provides them with support at this time? In the past? Can this be depended on ... Is this support effective? Should there be new supports put in place?</i></p>
<p>I – Inner life with God <i>How is their inner life with God? Do they have a concept of God or the divine? Can you introduce them to a concept of God?</i></p>

There are many models for Spiritual Assessment or Spiritual History that you could research. Those presented here are recommended for use in Salvation Army Social Services. Please find a model that works for your ministry setting and implement the use of it to meet the accreditation standards and to strengthen your ministry.

Documentation of Spiritual and Religious Care

Following client intake and spiritual assessment a system needs to be in place for the documentation of spiritual and religious care interactions. This documentation will give strength and direction to the overall plan of care for the client and will provide all members of the care team insight into how the spiritual element of the client's life can affect his/her progress in care.

The on-going documentation goes by various names in the varied types of Ministry Units in Salvation Army Social Services; some of those names are:

Progress Chart
Client Follow-up
Care Plan
Progress Notes

For the purpose of this explanation they will be called Spiritual Care Progress Notes. These notes are to be part of the client care record and shared with the care team. Chaplaincy Notes may have their own section "Spiritual Care Progress Notes" or may be included in the notations by date that provide a daily log of care team interactions with a specific client. As noted before you will need to develop a method that is suitable to the team and ministry you are involved with.

All notations should have the date entered and be concise. It is not necessary to share the depth of a confidential conversation yet you need to record the intervention. An example of this is that if you are working with a client and they share their intimate detailed story of childhood abuse all that you need to record is that – client is working through the current impact of childhood trauma. You do not need to share details or break confidentiality.

You will find it most helpful to use the D-A-R method to summarize and record your interventions. A few sentences in each section are sufficient.

Data: why seeing client... what you found ...

Action: what you did with client

Response: Therefore → what the client did Or will do

→ and what you did ... and will do... next steps.

Thank you.

Samples of spiritual assessments and progress notes are found in the resources that follow.