

## Evaluating your Spiritual Assessment Process

**Q** Our organization is examining its spiritual assessment process. What does the Joint Commission require?

**A** Per standards and elements of performance (EPs) found in the “Provision of Care, Treatment, and Services” (PC) chapter in the accreditation manuals,\* the Joint Commission requires organizations to include a spiritual assessment as part of the overall assessment of a patient to determine how the patient’s spiritual outlook can affect his or her care, treatment, and services. This assessment should also determine whether more in-depth assessments are necessary.

While the Joint Commission leaves the specifics to each organization, spiritual assessment should, at a minimum, determine the patient’s religious affiliation (if any), as well as any beliefs or spiritual practices that are important to the patient. While the content and format of the spiritual assessment will vary depending on the organization and type of patients served, organizations should develop a basic policy regarding the content and scope of spiritual assessments and outline who is qualified and competent to perform such assessments within the organization.

### Barriers to Addressing Spirituality

Poor timing, lack of training, and discomfort with the subject matter are just a few of the barriers that can stand in the way of a staff member’s conducting spiritual assessments effectively.

\* Spiritual assessment-related standards and EPs can be found in PC.2.20, EP 4, for hospitals and ambulatory care; PC.2.20, EP 20 for long term care; PC.2.60, EPs 1 and 3 for behavioral health care; and PC.2.20, EP 8 for home care.

Organizations that encourage staff to take time for the spiritual assessment and provide staff with a clear framework of that assessment can help to address some of these challenges.

Assessing a patient’s spirituality and the need for support can be a delicate subject with some patients, and staff members need to extract helpful information without causing offense. The main goal of the spiritual assessment should be to identify the patient’s needs, hopes, resources, and possible outcomes regarding spirituality and determine appropriate actions necessary to address those issues. Individuals assessing a patient’s spirituality must be careful not to impose their belief system or definition of spirituality on the patient. According to Sue Wintz, chair of the Commission on Quality in Pastoral Services, “It is essential to listen to the

### Why Assess Spirituality?

Spirituality is an often overlooked, yet still important element of patient assessment and care. Addressing and supporting patients’ spirituality can not only make their health care experiences more positive, but in many cases can promote health, decrease depression, help patients cope with a difficult illness, and even improve outcomes for some patients. In addition to the potential medical benefits, patients want their health care providers to discuss spirituality with them. In one study, a majority of patients indicated that they would like their physicians to ask whether patients have spiritual or religious beliefs that would influence their medical decisions if they became gravely ill.<sup>4</sup> Another study found that 40% of patients felt that physicians should discuss pertinent religious issues with their patients, however only 11% of physicians frequently or always did.<sup>5</sup>

patient’s needs with an open mind in order to gain understanding of the patient’s beliefs. The patient’s needs and beliefs can guide the assessor in terms of how the patient wants to utilize spiritual or religious beliefs in their care or treatment.”

A staff member’s comfort in assessing spirituality may be linked to his or her own experiences with spirituality. For this reason, if your organization or community has pastoral care resources, it may also be helpful to access information from pastoral care professionals. Clinically trained, professional pastoral care providers can offer insight and assistance in developing spiritual assessments for your organization.

### Who Should Conduct a Spiritual Assessment?

Depending on the type and size of your organization, different staff members can and should conduct spiritual assessments. As with other types of assessments, the spiritual assessment should be multidisciplinary. Physicians, therapists, nurses, and clinical pastoral staff should receive training on the value of spiritual assessment and the tools that should be used to assess a patient’s spirituality.

### Approaches to Determining Spiritual Assessment Content

In designing a spiritual assessment, your organization will need to determine the mechanism(s) you will use to collect information and when an in-depth spiritual assessment will be necessary. Your organization may want to consider the following questions:

- Will staff ask direct questions of the patient regarding his or her spirituality? If so, some appropriate questions may address support systems, prayer, spiritual goals, religious or spiritual resources used to cope with challenges, and beliefs about life and illness.

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- Will staff be encouraged to use a mnemonic device such as HOPE? (This device helps organize questions around the topics of **H**ope, **O**rganized religion, **P**ersonal spirituality and practices, and **E**ffects on medical care and end-of-life issues.)
- Will staff be trained to observe certain indicators that might signal a need for a further assessment? Such indicators may include crying, anger, resentment, depression, or “God talk,” among others. Statements such as “I pray nothing goes wrong,” or

### **Spirituality vs. Religion— More than Just Semantics**

While many people use the words *spirituality* and *religion* interchangeably, they are in fact very different. Spirituality can be defined as a complex and multidimensional part of the human experience—our inner belief system. It helps individuals to search for the meaning and purpose of life, and it helps them experience hope, love, inner peace, comfort, and support.<sup>6</sup>

Religion refers to a belief system to which an individual adheres.<sup>1</sup> Religion involves particular rituals and practices—the externals of our belief system. Many people find spirituality through religion; however, some people find spirituality through communing with nature, music, the arts, quest for scientific truth, or a set of values and principles.<sup>6</sup> Not everyone is religious, nor is religion a requirement for spirituality.

Within a spiritual assessment, it is important to determine if a patient has a religious affiliation; however, that is not the sole purpose of the assessment. A person may not practice religion, but may still have spiritual needs that should be met. Any assessment process should identify these spiritual needs, in whatever form they take.

“It’s in God’s hands now,” provide an opportunity to investigate spirituality.<sup>1</sup>

- When will staff conduct the spiritual assessment? What type of patient should receive an in-depth spiritual assessment?

### **Involve Staff**

Because different staff members throughout the organization may be responsible for conducting a spiritual assessment at some level, it is important to involve multiple disciplines in understanding how the assessment is to be designed and what it includes in order for it to be utilized effectively.

Organizations should be sure to respect the spiritual views of both religious and nonreligious staff and patients in their assessment tools.<sup>2</sup>

Providing education to staff regarding spiritual assessment is critical. Training staff on the appropriate content of the spiritual assessment, as well as on the different ways an assessment can be documented, is very important. Once training has occurred, assessment of staff competence regarding spiritual assessment should also take place to make sure that any training provided is appropriate.

### **Assuring Assessor Competence**

As with any other kind of assessment, staff members conducting a spiritual assessment should be competent to do so. Cultural competence is particularly important in this arena as different cultures have different views on spirituality and religion. For example, a devout Catholic patient from the Philippines will have a strikingly different view of

religion and spirituality than a Native American patient who may take his or her spiritual strength from nature in addition to or separate from a formal religious tradition.

Staff members capable of conducting a spiritual assessment may come from varied backgrounds. The qualities that make a good spiritual assessor do not necessarily limit themselves to one particular job classification. Individuals who will competently assess a patient’s spirituality tend to have the following characteristics:

- A willingness and a desire to learn about how to conduct a spiritual assessment
- An understanding that there are many different spiritual and religious perspectives
- An ability to focus on spiritual issues with a patient without forcing one’s own beliefs on him or her
- A comfort level with discussing spiritual issues
- A knowledge of appropriate responses to spiritual disclosures, including prayer, meditation, walks in quiet nature areas, and so forth<sup>3</sup> *TheSource*

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### **References**

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