

NAME of Client: _____ DATE of Assessment: _____
Person Completing Assessment: _____

BIO-PSYCHO-SOCIAL-SPIRITUAL ASSESSMENT & TREATMENT PLAN

I. Identifying Information

A. Demographic information: age, sex, ethnic group, current employment, marital status, physical environment/housing: nature of living circumstances (apartment, group home or other shared living arrangement, homeless); neighborhood.

B. Referral information: referral source (self or other), reason for referral. Other professionals or indigenous helpers currently involved.

C. Data sources used in writing this assessment: interviews with others involved (list dates and persons), tests performed, other data used.

II. Presenting Problem

A. Description of the problem, and situation for which help is sought as presented by the client. Use the client's words. What precipitated the current difficulty? What feelings and thoughts have been aroused? How has the client coped so far?

B. Who else is involved in the problem? How are they involved? How do they view the problem? How have they reacted? How have they contributed to the problem or solution?

C. Past experiences related to current difficulty. Has something like this ever happened before? If so, how was it handled then? What were the consequences?

III. Background History

A. Developmental history: from early life to present (if obtainable)

B. Family background: description of family of origin and current family. Extent of support. Family perspective on client and client's perspective on family. Family communication patterns. Family's influence on client and intergenerational factors.

C. Intimate relationship history

D. Educational and/or vocational training

E. Employment history

F. Military history (if applicable)

G. Use and abuse of alcohol or drugs, self and family

H. Medical history: birth information, illnesses, accidents, surgery, allergies, disabilities, health problems in family, nutrition, exercise, sleep

I. Mental Health history: previous mental health problems and treatment, hospitalizations, outcome of treatment, family mental health issues.

J. Nodal events: deaths of significant others, serious losses or traumas, significant life achievements

K. Cultural background: race/ethnicity, primary language/other languages spoken, significance of cultural identity, cultural strengths, experiences of discrimination or oppression, migration experience and impact of migration on individual and family life cycle.

L. Religion: denomination, church membership, extent of involvement, spiritual perspective, special observances

IV. Assessment

A. What is the key issue or problem from the client's perspective? From the worker's perspective?

B. How effectively is the client functioning?

C. What factors, including thoughts, behaviors, personality issues, environmental circumstances, stressors, vulnerabilities, and needs seem to be contributing to the problem(s)? Please use systems theory with the ecological perspective as a framework when identifying these factors.

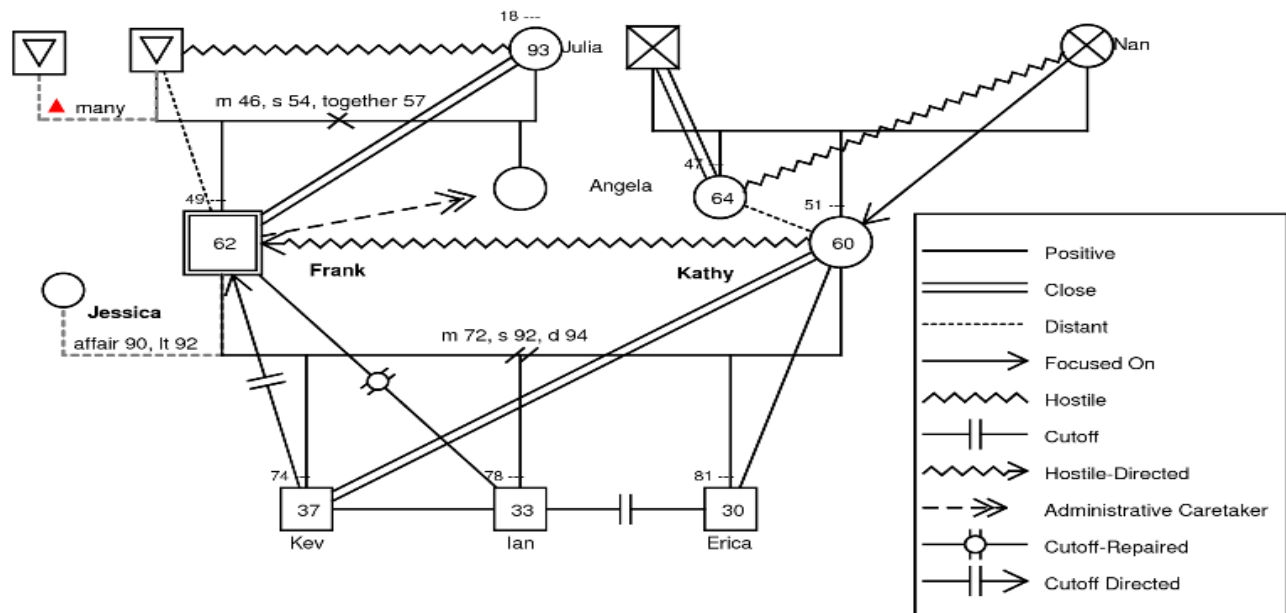
D. Identify the strengths, sources of meaning, coping ability, and resources that can be mobilized to help the client.

E. Assess client's motivation and potential to benefit from intervention

V. Recommendations/Proposed Intervention
A. Tentative Goals (with measurable objectives and tasks)
1. One Short-term Goal
Measurable objective: Task:
2. One Long-term Goal
Measurable objective: Task:
B. Units of Attention
C. Possible obstacles and tentative approach to obstacles
D. Other important information

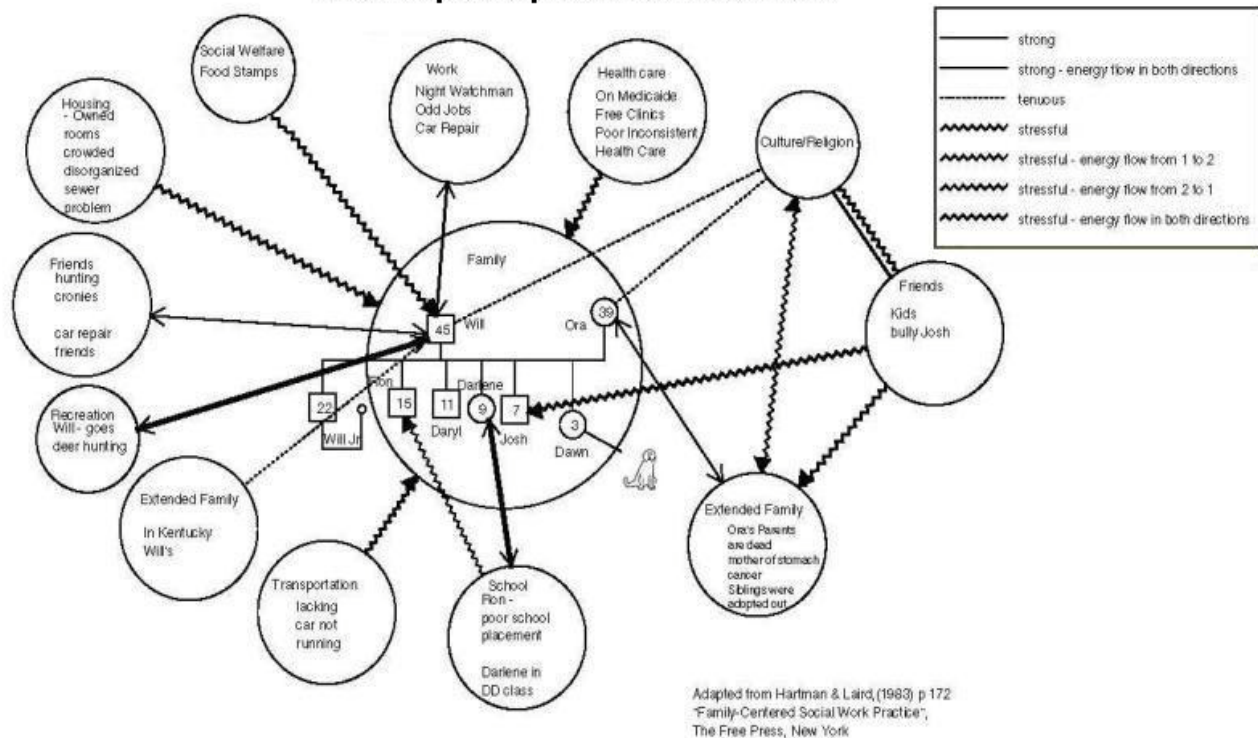
Sample Genogram

Frank - Interpersonal Relationships



Sample Ecomap

Eco-map Adapted from Hartman



Assessment provided by the Council on Social Work Education's Gero-Ed Center (2015)

Genogram and Ecomap examples provided by <http://www.genogramanalytics.com/>