

# REVIEWING BOB'S PERSONAL HEALTH INVENTORY BOOKLET

The Personal Health Inventory (PHI) is more commonly used, but the longer PHI Booklet can provide additional useful information. Use it if the following are true:

- You have enough time to go into more detail during a Whole Health visit.
- Your patient is willing to take the extra time (15-20 minutes, possibly more) to complete it.
- It would be helpful for a patient to take more time to reflect on answers to the questions about “Where You Are and Where You Want to Be.” In the PHI Booklet, unlike the PHI, there is space to write about the reasons you chose your answers to the questions in this section.
- Your patient has a sufficient literacy level to complete the form. This not only includes reading skills, but also health literacy.
- You want the patient to have more opportunity to read up on Whole Health (a good portion of the PHI Booklet focuses on defining Whole Health and describing the parts of the Circle of Health).

For more information, refer to [Bob's Personal Health Inventory Booklet](#).

## REVIEWING BOB'S ANSWERS

### PHI BOOKLET SECTION ONE: THREE IMPORTANT QUESTIONS

1. **Question #1** cuts right to the chase. It helps the clinician gain a sense of what Bob's mission might be. Remember that defining the mission and focusing the care plan on completing the mission are essential elements of patient-driven care.

1. What REALLY matters to you in your life?

*My family, I am close to my daughter's kids. They live nearby. My daughter is a widow, and I want to be able to give my granddaughter away at her wedding next year and stand in for the father-daughter dance. I want to be independent for as long as I can be. I want to be useful. I like to help other people. My faith is also very important to me.*

Bob's mission—to participate in his granddaughter's wedding—stands out immediately. Discussions related to independence, being useful, and his faith could also prove fruitful in guiding the creation of Bob's Personal Health Plan (PHP).

2. **Question #2** focuses on the positives, which sets a tone of appreciative inquiry that carries through much of the form. The focus becomes what one *aspires to*, rather than what is wrong.

2. What brings you a sense of joy and happiness?

I am happy when I am outdoors, taking photographs. I love to tinker with my old 35 mm camera and work in flower beds. I love to spend time with my teenage grandsons. They still let me take them fishing sometimes. I like to be out on my boat, wondering if it will sink this time or wait until next time.

A gratifying part of reviewing PHIs is learning about people's talents and hobbies. Some practitioners make it a point to learn something from every patient they see. One might ask Bob about the best times of day to do nature photography or what kind of boat he has and why—anything of that nature. We all love to discuss our passions, and taking the conversation somewhere familiar might help Bob relax and open up.

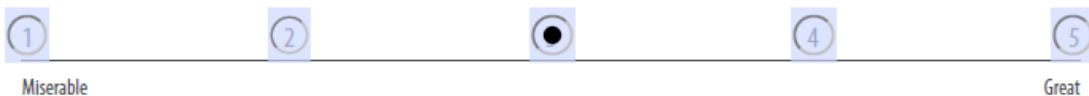
3. **Question #3** is then built around 3 rating scales that capture Bob's current state of well-being and function. The answers to these questions are called, "The Vitality Signs" and can give an indication about how a person is doing in general. If someone is suicidal, these questions may be an important indicator of that fact. For Bob, there is some definite room for improvement on all 3, but the difference between the physical and mental/emotional well-being numbers might lead the clinician to focus on the physical side first. Asking about the reasons for circling "2" for the last question on living Bob's day-to-day life might also be revealing.

3. On the following scales from 1-5, with 1 being miserable and 5 being great, circle where you feel you are on the scale.

**Physical Well-Being:**



**Mental/Emotional Well-Being:**



**Life: How is it to live your day-to-day life?**



## **PHI BOOKLET SECTION TWO: WHERE YOU ARE AND WHERE YOU WOULD LIKE TO BE**

This section focuses on the eight components of self-care, key aspects of our health that are influenced by both our circumstances and the choices we make in everyday life. A unique aspect of the PHI is that it not only asks patients where they are with each component, but also *where they want to be*. As with the questions in the first section, this line of questioning gets them thinking about their goals.

If time is limited, this section allows the clinician to make a quick sweep through the circled numbers to assess the following: 1) which areas the person feels are the most problematic, and 2) which areas the person most wants to change. While the numbers are of secondary importance relative to the subjective data the patient provides, they can nonetheless guide the conversation.

The instructions to this section read as follows:

### **WHERE YOU ARE AND WHERE YOU'D LIKE TO BE**

For each of the following areas, consider where you are now and where you would like to be. All the areas are important. In the "Where you are" box, briefly write the reasons you chose your number. In the "Where you want to be" box, write down some changes that might make this area better for you. Some areas are strongly connected to other areas, so you may notice some of your answers seem the same. Try to fill out as many areas as you can. You do not have to write in every area or in all the areas at one time. You might want to start with the easier ones and come back to the harder ones. It is OK just to circle the numbers.

The form conveys a strong sense of where Bob feels he currently is in each area, as well as his priorities. Presumably, the areas where we see the biggest jump in numbers from "Where you are" to "Where would you like to be" would be important areas to discuss with him. Note, however, that this process is not all about the numbers; the numbers can serve as a "way in" to a conversation. Clinicians working with the Whole Health approach note that some people do not choose to work on the area where they gave themselves the lowest score, or where there was the biggest gap between where they are and where they want to be.

For Bob, the differences in numbers for “Moving the Body” and “Food and Drink” are most striking.

<p><b>Moving the Body:</b> Our physical, mental, and emotional health are impacted by the amount and kind of movement we do. Moving the body can take many forms such as dancing, walking, gardening, yoga, and exercise.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p><input checked="" type="radio"/> 1   <input type="radio"/> 2   <input type="radio"/> 3   <input type="radio"/> 4   <input type="radio"/> 5</p>	<p>Where would you like to be?</p> <p><input type="radio"/> 1   <input type="radio"/> 2   <input type="radio"/> 3   <input checked="" type="radio"/> 4   <input type="radio"/> 5</p>
<p>What are the reasons you choose this number?</p> <p>I am out of shape. My knees hurt, so I don't get around too well. I get out of breath easy.</p>	<p>What changes could you make to help you get there?</p> <p>Exercise more. Maybe with a specific program, so I won't keep making false starts. I like walking outside.</p>

<p><b>Food and Drink:</b> What we eat and drink can have a huge effect on how we experience life, both physically and mentally. Energy, mood, weight, how long we live, and overall health are all impacted by what and how we choose to eat and drink.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p><input checked="" type="radio"/> 1   <input type="radio"/> 2   <input type="radio"/> 3   <input type="radio"/> 4   <input type="radio"/> 5</p>	<p>Where would you like to be?</p> <p><input type="radio"/> 1   <input type="radio"/> 2   <input type="radio"/> 3   <input checked="" type="radio"/> 4   <input type="radio"/> 5</p>
<p>What are the reasons you choose this number?</p> <p>When I am stressed, I eat. And I get stressed a lot with my PTSD. I eat a lot of carbs late at night.</p>	<p>What changes could you make to help you get there?</p> <p>I need to do all the stuff I already know about. Veggies, whole grains. Low fat. It's like exercise. I am really good at starting over, but not so great at sticking with it.</p>

Knowing Bob's health history, you might feel relieved to see that Bob realizes that diet and exercise are of vital importance.

In contrast, some areas might be considered “second tier” based on the numbers. For instance, look at Bob's responses to “Recharge” and “Family, Friends, and Co-Workers.”

<p><b>Recharge:</b> Our bodies and minds must rest and recharge in order to optimize our health. Getting a good night's rest, as well as recharging our mental and physical energy throughout the day, are vital to well-being. Taking short breaks or doing something you enjoy or feels good for moments throughout the day are examples of ways to refresh.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p><input type="radio"/> 1   <input checked="" type="radio"/> 2   <input type="radio"/> 3   <input type="radio"/> 4   <input type="radio"/> 5</p>	<p>Where would you like to be?</p> <p><input type="radio"/> 1   <input type="radio"/> 2   <input type="radio"/> 3   <input checked="" type="radio"/> 4   <input type="radio"/> 5</p>
<p>What are the reasons you choose this number?</p> <p>I miss my wife. Haven't slept too well since she died a few years ago.</p>	<p>What changes could you make to help you get there?</p> <p>I don't know. I have tried different medications and supplements to sleep. I think I snore and wake myself up.</p>

<p><b>Family, Friends, and Co-workers:</b> Our relationships, including those with pets, are as important to our health and well-being as any other factor. Spending more time in relationships that 'fuel' us and less in relationships that 'drain' us is one potential option. Improving our relationship skills or creating new relationships through community activities are other options to consider.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p> <input type="radio"/> 1                    <input type="radio"/> 2                    <input checked="" type="radio"/> 3                    <input type="radio"/> 4                    <input type="radio"/> 5             </p>	<p>Where would you like to be?</p> <p> <input type="radio"/> 1                    <input type="radio"/> 2                    <input type="radio"/> 3                    <input type="radio"/> 4                    <input checked="" type="radio"/> 5             </p>
<p>What are the reasons you choose this number?</p> <p>I am a quiet guy, but I hate it when I am too tired or too nervous to leave the house. I hide out when I am stressed.</p>	<p>What changes could you make to help you get there?</p> <p>Could get back in touch with my sister and brother. We only talk on holidays. Maybe find a new lady friend. Yeah, right!</p>

Bob's commentary in the "Recharge" section suggests that it would be useful to talk to Bob about sleep at some point. If sleep apnea turns out to be an issue, it should, of course, be given high priority. Bob mentions wanting to have a romantic partner a few times in the form. That also may be worth exploring as time allows in this or a future visit.

Finally, there are four areas where Bob has few concerns or is doing relatively well. To start your discussion of self-care with Bob, it may be worth highlighting some of these strengths before you begin discussing where he wants to improve. How will these areas help him to reach his goals in the areas where he gave himself lower ratings?

<p><b>Personal Development:</b> Our health is impacted by how we choose to spend our time. Aligning our work and personal activities with what really matters to us, or what brings us joy, can have a big effect on our health and outlook on life.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p> <input type="radio"/> 1                    <input type="radio"/> 2                    <input type="radio"/> 3                    <input checked="" type="radio"/> 4                    <input type="radio"/> 5             </p>	<p>Where would you like to be?</p> <p> <input type="radio"/> 1                    <input type="radio"/> 2                    <input type="radio"/> 3                    <input checked="" type="radio"/> 4                    <input type="radio"/> 5             </p>
<p>What are the reasons you choose this number?</p> <p>I feel pretty good with this. I have my photography. Feel like I am there for my daughter and her kids. I miss my wife.</p>	<p>What changes could you make to help you get there?</p> <p>Maybe I'll volunteer sometime.</p>

<p><b>Surroundings:</b> Our surroundings, both at work and where we live, indoors and out, can affect our health and outlook on life. Changes within our control such as organizing, decluttering, or adding a plant or artwork can improve mood and health.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p>1   2   3   4   <input checked="" type="radio"/></p>	<p>Where would you like to be?</p> <p>1   2   3   4   <input checked="" type="radio"/></p>
<p>What are the reasons you choose this number?</p> <p>I still live in our family home. It is out of town a bit and has a very pretty yard. No noise, just the way I like it.</p>	<p>What changes could you make to help you get there?</p> <p>I can't take care of my wife's flower beds like I want. It is harder to get up and down.</p>

<p><b>Spirit and Soul:</b> Connecting with something greater than ourselves may provide a sense of meaning and purpose, peace, or comfort. Connecting and aligning spiritually is very individual and may take the form of religious affiliation, connection to nature, or engaging in things like music or art.</p>	
<p>Where you are: Rate yourself on a scale of 1 (low) to 5 (high)</p> <p>1   2   3   <input checked="" type="radio"/>   5</p>	<p>Where would you like to be?</p> <p>1   2   3   4   <input checked="" type="radio"/></p>
<p>What are the reasons you choose this number?</p> <p>I have always prayed. I have never been in a particular church, but I believe in God and in something after this life.</p>	<p>What changes could you make to help you get there?</p> <p>Always room to be a better person.</p>

### PHI BOOKLET SECTION THREE: PROFESSIONAL CARE

The PHI is designed to ensure that routine preventive care and clinical care have been accessible and of full potential benefit to the patient. The clinical care question, in asking about Bob's understanding of his health problems and his role in addressing them, can help the clinician get a sense of his health literacy.

**PROFESSIONAL CARE**

**Prevention:** On a scale of 1-5, circle the number that best describes how up to date you are on your preventive care such as a flu shot, cholesterol check, cancer screening, and dental care.

1       2       3       4       5

Not at all      A little bit      Somewhat      Quite a bit      Very much

**Clinical Care:** If you are working with a health care professional, on a scale of 1-5, circle the number that best describes how well you understand your health problems, the treatment plan, and your role in your health.

1       2       3       4       5

Not at all      A little bit      Somewhat      Quite a bit      Very much

I am not working with a health care professional.

Bob is doing pretty well in this arena. It may be worth it to ask him what aspects of preventive care he feels he is missing. Motivational Interviewing, which many VA personnel have learned, can be useful throughout the conversation, and it is particularly helpful here.[1]

The clinical care question serves as a good reminder to check in with every person about the care they receive “outside the clinic” as well, from complementary medicine providers, for example. As will be noted in the [“Implementing Whole Health in Your Practice, Part III: Complementary and Integrative Health for Veterans”](#) overview and related Whole Health tools, patients will not always disclose their use of complementary approaches unless specifically asked.

#### **PHI BOOKLET SECTION FOUR: REFLECTIONS**

In this section, we return to Bob’s aspirations. For what reasons does Bob want his health? The first question in this section again encourages people to think in terms of wellness rather than illness. The second question provides additional direction for next steps.

Since patient-driven care involves patients as the leaders of their own care teams, it makes sense that the people, like Bob, be encouraged to offer their own initial thoughts regarding what should be given priority in their PHPs. By teasing out his thoughts, the PHI encourages Bob to make a great start on creating his PHP.

## REFLECTIONS

1. Now that you have thought about all of these areas, what is your vision of your best possible health? What would your life look like? What kind of activities would you be doing?

I'd give my granddaughter away and dance at her wedding - all night long. With the woman of my dreams! Seriously, I love being active. I don't want to just fade away. I would be around to see my great grandchildren. I would go up to Alaska to do some photography. Always wanted to take a picture of a bear catching a salmon right out of a waterfall. I am well enough that I can be there to help others. Not tired. Not stressed about leaving the house. And my wife could look down on her flower beds from Heaven and not shake her head sadly, but rather smile and nod.

2. Are there any areas you would like to work on? Where might you start?

I can see there is a lot, but I need to work on diet and exercise first, or the rest of it won't matter too much.

By answering these questions on the PHI, Bob helps to set the priorities for his care before he even starts speaking to you. And you have the pleasure of learning some things about Bob you might not have picked up previously.

With a little practice, a clinician can acquire a lot of valuable information after just a few minutes of having looked over the PHI. Because the form can be filled out and reviewed in advance of the visit, using it can potentially save the clinician time. Additionally, given that you can use the same PHI to guide multiple visits in the future, there is the potential for even greater time savings in the long run.

## CONCLUSION

When appropriate, the PHI Booklet can be a nice addition to your Whole Health practice. Remember, in a Whole Health System, every member of the team will be doing their part with reviewing a Veteran's PHP and supporting the Veteran with next steps. The PHI Booklet, as we have seen here in Bob's case, can be one of many powerful tools you can use to move the planning process forward.

## RESOURCE LINKS

- [Healthy Journeys website](http://www.healthjourneys.com/): <http://www.healthjourneys.com/>
- [Bob's Personal Health Inventory Booklet](https://www.va.gov/WHOLEHEALTHLIBRARY/tools/reviewing-bobs-personal-health-inventory-booklet.asp):  
<https://www.va.gov/WHOLEHEALTHLIBRARY/tools/reviewing-bobs-personal-health-inventory-booklet.asp>
- [Implementing Whole Health in Your Practice, Part III: Complementary and Integrative Health for Veterans](https://wholehealth.wisc.edu/overviews/part-iii-complementary-integrative-health/):  
<https://wholehealth.wisc.edu/overviews/part-iii-complementary-integrative-health/>



## AUTHOR

"Reviewing Bob's Personal Health Inventory Booklet" was written by [J. Adam Rindfleisch](#), MPhil, MD (2014, updated 2017).

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## REFERENCES

1. Lundahl B, Moleni T, Burke BL, et al. Motivational interviewing in medical care settings: a systematic review and meta-analysis of randomized controlled trials. *Patient Educ Couns.* 2013;93(2):157-168.