CORE OF DISCIPLINE #2: DEVELOP A COMPREHENSIVE BIOPSYCHOSOCIAL FORMULATION DURING AN ASSESSMENT

Short Description:
Learner will demonstrate mastery on the biopsychosocial formulation of presenting difficulties. The learner will conduct a comprehensive assessment based on this formulation for a variety of patients across the lifespan and in varying degrees of complexity.

Assessment Options:
- Direct observation
- Psychodynamic case report
- Mock STACER
- STACER

Scope:
- Any patient in a clinical or educational setting
- Must include one geriatric assessment and one child assessment

Possible Clinical Settings:
- Any clinical rotation

Milestones:

COD2M1: Demonstrates mastery of the generic structure of the biopsychosocial formulation and demonstrates excellence in developing a patient-specific formulation
- May demonstrate knowledge of generic structure of the formulation by teaching it to a junior learner or interdisciplinary learner (e.g. Social work student)
- Is able to discuss the role of a formulation, either with the patient or with staff
- Makes reference to predisposing, precipitating, perpetuating and protective factors, without necessarily having to rely on a table or a grid
- Draws on multiple sources and methods for obtaining information for the assessment
- Demonstrates flexibility in adapting and revising a formulation as further information emerges, and upon feedback from both patient and/or supervisor

COD2M2: Thoroughly assesses biological factors contributing to presenting difficulty
- Able to draw on varying biological hypotheses and known mechanism of action of presenting illness
- Is able to cite epidemiological and demographic data of the presenting difficulty, as well as the usual course of the condition
- Able to identify a wide biological differential and medical conditions mimicking this presenting difficulty, as it pertains to the patient
- Is able to comment on the complex interplay between ongoing comorbidities and presenting illness as it pertains to the patient (e.g. substance use contributing to ongoing symptoms)
- Is able to draw on standardized tools and measurement based care (e.g. PHQ9) to assess a degree of difficulty when appropriate

**COD2M3: Thoroughly assess psychological factors contributing to presenting difficulty**
- Able to draw on background knowledge including theory from different schools of thought
- Caters the formulation to a patient-appropriate psychological model (e.g. cognitive behavioural model)
- Is able to test these psychological theories out during the assessment of the patient
- Considers patient’s views, attitudes, and personal circumstances in ability to appreciate presenting difficulty (e.g. readiness to accept the information, level of insight)
- Explores patient’s identity and takes into account whole person experience
- Identifies patient’s coping style
- Explores meanings of symptoms/illness/suffering and experience of pathways to care
- Demonstrates the intricate relationship of socio-cultural factors of the individual with the presenting difficulty, and its psychological manifestation (e.g. social stigma leading to low self-worth)

**COD2M4: Thoroughly assesses social factors contributing to presenting difficulty**
- Appreciates the multiple contexts which the patient is part of in their everyday life, and how this has changed with their presenting difficulty (e.g. family system, school, employment, community setting, professional network, culture, religion)
- Identifies significant relationships and their dynamic influence on the presenting difficulty
- Identifies history of trauma
- Identifies developmental factors
- Awareness of how a patient’s environment or cultural setting may inform their attitude towards their healthcare provider

**COD2M5: Clearly identifies social determinants of health as it relates to this patient**
• Identifies gaps in available care as it relates to the patient  
• Identifies ways in which a clinician can advocate for the patient

**COD2M6: Communicates the formulation in an effective manner**

• Presents management plan to colleagues in written or oral form  
• Communicates formulation to patient in language that is appropriate and validating.