

Personal Wellness Index (PWI) Worksheet

The Personal Wellness Index (PWI) is a tool adapted by Dr. Patrick Carnes to help people in recovery detect escalating risk for slips or relapse by monitoring early, everyday signs that they are becoming **out of balance** and by tracking a return to **wellness**. It was originally used by professionals in group home settings to establish routines and support individuals with intellectual disabilities.

The PWI is based on two assumptions:

- **Being out of balance** first appears in routine, simple behaviors that support lifestyle balance.
- Behavioral signs will occur in patterns involving different parts of our lives.

If we aren't intentionally examining our behaviors, we may not notice that our checking account is overdrawn. If our checking account is overdrawn, we may also be out of socks because we have not done our laundry. If this pattern is pervasive, there is a risk that our lives will become emotionally bankrupt.

The idea of the PWI is to consider twelve dimensions of life. Then you'll use these to figure out your top seven indicators for encroaching **out of balance**, and then take an inventory of your PWI each day, so you have an objective idea of where things are for you in terms of your inner and outer environment.

The PWI is highly personal. For some people, skipping workouts may not be a big deal. But for you, it might be an indication that you are not taking care of yourself or finding the right balance in life.

Following are twelve dimensions of your life in which you will identify danger signs that will indicate your life is getting out of balance. Write your answers in the space provided.

1. Physical Health

The ultimate mistake is to not take care of our body. When our physical health deteriorates, it affects everything. Examples of being **out of balance** in this area include being over a certain weight, missing regular exercise, feeling exhausted from lack of sleep, skipping showers or meals, or not taking medication as prescribed.

How do you know that you are not taking care of your body?

- a. _____
- b. _____
- c. _____

2. Transportation

How people get from place to place is often a statement about lifestyle. For example, a car owner who seldom comes to a full stop, routinely exceeds the speed limit, runs out of gas, forgets to check the oil, puts off needed repairs, neglects to clean out the backseat, and averages multiple tickets per year. Another example is the bus rider who routinely misses the bus, forgets to carry change or bus pass, or frequently leaves a smartphone or purse behind.

What are the transportation behaviors that indicate your life is getting out of control?

- a. _____
- b. _____
- c. _____

3. Environment

To not have time to do your personal chores is a comment on the order of your life. Consider the home in which the plants go unwatered, fish are unfed, grocery supplies are depleted, laundry is not done or put away, cleaning is neglected, and dishes go unwashed.

What are ways in which you neglect your home or living space?

- a. _____
- b. _____
- c. _____

4. Work

Chaos at work is risky for recovery. Signs of chaotic behavior include failing to return phone calls within 24 hours, showing up late for appointments, falling behind in promised work, having an unmanageable in-basket, and putting too many irons in the fire.

When your life is unmanageable at work, what are your behaviors?

- a. _____
- b. _____
- c. _____

5. Interests

What are some positive interests, besides work, that give you perspective on the world? Music, reading, photography, fishing, cooking, and gardening are examples. *Note: This is the only category in which you list positive factors. If you use one of these for your PWI calculation later, phrase it as "Lack of ____."*

What are you doing when you're not overextended?



- a. _____
- b. _____
- c. _____

6. Social Life

Think of friends in your social network (beyond a significant other or family members) who provide significant support for you.

What are signs that you've become isolated, alienated, or disconnected from this network?

- a. _____
- b. _____
- c. _____

7. Family and Significant Others

Examples of being **out of balance** in this area of life include staying silent, becoming overtly hostile, or engaging in passive-aggressive behaviors.

What behaviors indicate that you are disconnected from those closest to you?

- a. _____
- b. _____
- c. _____

8. Finances

We handle our financial resources much like our personal resources. Signs of financial overextension include an unbalanced checking account, overdue bills, a lack of ready cash, and spending more than you earn. These may have parallels in various forms of emotional overextension.

What signs indicate that you are financially overextended?

- a. _____
- b. _____
- c. _____

9. Spiritual Life and Personal Reflection

Spirituality can be diverse and include such activities as meditation, yoga, and prayer. Personal reflection includes keeping a personal journal, completing daily readings, and pursuing therapy.

What sources of routine personal reflection do you neglect when you are overextended?

- a. _____
- b. _____
- c. _____

10. Other Compulsive or Symptomatic Behaviors

Compulsive behaviors that have negative consequences indicate something about your general well-being and state of overall recovery. When you watch inordinate amounts of TV, overeat, bite your nails, or develop another compulsive



behavior that erodes your self-esteem, these behaviors—such as forgetfulness, slips of the tongue, or jealousy—are further evidence of overextension.

What negative compulsive or symptomatic behaviors are present when you feel “on the edge”?

- a. _____
- b. _____
- c. _____

11. Twelve Step Practice and Therapeutic Self-Care

Living a Twelve Step way of life involves many practices. Group attendance, Step work, sponsorship, service, and Twelve Step phone calls to support group members become the foundation of a good recovery. For some partners attending therapy, their method of self-care may be being involved in a facilitated support group.

What recovery activities do you neglect first?

- a. _____
- b. _____
- c. _____

12. Healthy Relationships

Engaging in exploitative, abusive, or otherwise unhealthy relationships is a sign that you are not well grounded in your recovery.

What are signs that a relationship of yours is unhealthy or becoming unhealthy? Are you lying to the other person in the relationship or leaving out important pieces of the truth? Are you afraid to say what is on your mind? Are your boundaries still firm, or are you doing things someone else wants you to do even when it's not right for you?

- a. _____
- b. _____
- c. _____

Record & Interpret Daily Examples of your PWI

Directions: The PWI is effective only when a careful record is maintained. Recording your daily process in conjunction with regular journal-keeping will help you stay focused on priorities that keep life manageable; work on program efforts a day at a time; expand your knowledge of your personal patterns; and provide a warning of self-destructive cycles during periods of vulnerability.

From the thirty-six(ish) signs of being **out of balance** you recorded, choose the seven that are most critical for you.

My critical incidents – seven key signs of being out of balance:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

At the end of each day, review this list and assign one point to each behavior that occurred during the day. Record your total points for each day in the space provided on the **Personal Wellness Chart** on the next page.

If you fail to record the number of points each day, that day receives an automatic score of seven. If you cannot even do a daily scoring, you are obviously **out of balance**.

At the end of the week total your seven daily scores for the week and make an X in the appropriate box in the **PWI Graph**. Chart your progress over a twelve-week period, and reflect on where you are in recovery.

Personal Wellness Chart

Day/Week	1	2	3	4	5	6	7	8	9	10	11	12
Sunday												
Monday												
Tuesday												
Wednesday												
Thursday												
Friday												
Saturday												
Weekly Total												

PWI Graph

Week	1	2	3	4	5	6	7	8	9	10	11	12
41–49 Very High Risk												
31–40 High Risk												
21–30 Medium Risk												
11–20 Stable Wellness												
1–10 Optimal Wellness												

Interpretation of the PWI

41–49 Very High Risk – Usually pursuing self-destructive behavior; overzealous about one's special interests; blames others for failures; seldom produces on time; controversial in community; success vs. achievement-oriented.

31–40 High Risk – Living in extremes (overactive or inactive); relationships abbreviated; feels irresponsible and is; constantly has reasons for not following through; lives one way, talks another; works hard to catch up.

21–30 Medium Risk – Often rushed; can't get it all in; no emotional margin for crisis; vulnerable to slip into old patterns; typically lives as if one has inordinate influence over others and/or feels inadequate.

11–20 Stable Wellness – Resilient. Recognizes human limits; does not pretend to be more than they are; maintains most boundaries; well ordered; typically feels competent; feels supported; able to weather crisis.

1–10 Optimal Wellness – Very resilient. Knows limits; has clear priorities; congruent with values; rooted in diversity; supportive; has established a personal system; balanced, orderly, resolves crises quickly; capacity to sustain spontaneity; shows creative discipline.