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| Counseling Case Conceptualization 3.0 |

**Date:**       **Clinician:**       **Client #:**

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| I. Introduction to Client |

*Identify primary client and significant others*

*Additional identifiers may include: religion, language, sexuality, immigration status, economic status, neurodiversity, chronic health conditions, mental health diagnoses, client’s position/role within their system(s), significant hobbies/interests or similar information.*

**Adult(s)**

Adult Age: Gender:       Race/Ethnicity:        Occupation:       Additional identifiers:

Adult Age: Gender:       Race/Ethnicity:       Occupation:       Additional identifiers:

**Child(ren)**

Child Age: Gender:       Race/Ethnicity:       School/Grade:       Additional identifiers:

Child Age: Gender:       Race/Ethnicity:       School/Grade:       Additional identifiers:

Child Age: Gender:       Race/Ethnicity:       School/Grade:       Additional identifiers:

Others in Household/Family/Significant Persons:

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| II. Presenting Concern(s) |

*Client Description of Problem(s):*

*Significant Other/Family Description(s) of Problems:*

*Broader System Problem Descriptions:* Description of problem from referring party, teachers, relatives, legal system, etc.:

Name:

Name:

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| III. Background Information |

*Trauma/Abuse History* (recent and past):

*Substance Use/Abuse* (current and past; self, family of origin, significant others):

*Precipitating Events* (recent life changes, first symptoms, stressors, etc.):

*Related Historical Background* (family history, related issues, previous counseling, etc.)**:**

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| IV. Client Strengths and Diversity |

**Client Strengths**

Personal:

Relational/Social:

Spiritual:

**Diversity: Resources and Limitations**

Identify potential resources and limitations available to clients based on their age, gender, sexual orientation, cultural background, socio-economic status, religion, regional community, language, family background, family configuration, abilities, etc.

Unique Resources:

Potential Limitations:

*Complete All of the Following Sections for a Complete Case Conceptualization or Specific Sections for Theory-Specific Conceptualization.*

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| V. Psychodynamic Conceptualization |

**Psychodynamic Defense Mechanisms**

*Check 2-4 most commonly used defense mechanisms*

[ ]  [ ] Acting Out: *Describe:*

[ ]  Denial: *Describe:*

[ ]  Displacement: *Describe:*

[ ]  Help-rejecting complaining: *Describe:*

[ ]  Humor: *Describe:*

*[ ]* Passive Aggression: *Describe:*

[ ]  Projection: *Describe:*

[ ]  Projective Identification: *Describe:*

[ ]  Rationalization: *Describe:*

[ ]  Reaction Formation: *Describe:*

[ ]  Repression: *Describe:*

[ ]  Splitting: *Describe:*

[ ]  Sublimation: *Describe:*

[ ]  Suppression: *Describe:*

[ ]  Other:

**Object Relational Patterns**

*Describe relationship with early caregivers in past:*

*Was the attachment with the mother (or equivalent) primarily:*

[ ]  Generally Secure [ ]  Anxious and Clingy [ ]  Avoidant and Emotionally Distant [ ]  Other:

*Was the attachment with the father (or equivalent) primarily:*

[ ]  Generally Secure [ ]  Anxious and Clingy [ ]  Avoidant and Emotionally Distant [ ]  Other:

*Describe present relationship with these caregivers:*

*Describe relational patterns with partner and other current relationships:*

**Erickson’s Psychosocial Developmental Stage**

*Describe development at each stage up to current stage*

Trust vs. Mistrust (Infant stage):

Autonomy vs. Shame and Doubt (Toddler stage):

Initiative vs. Guilt (Preschool age):

Industry vs. Inferiority (School age):

Identity vs. Role Confusion (Adolescence):

Intimacy vs. Isolation (Young adulthood):

Generativity vs. Stagnation (Adulthood):

Ego Integrity vs. Despair (Late Adulthood):

**Adlerian Style of Life Theme**

[ ]  Control:

[ ]  Superiority:

[ ]  Pleasing:

[ ]  Comfort:

*Basic Mistake Misperceptions*:

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| VI. Humanistic-Existential Conceptualization  |

**Expression of Authentic Self**

*Problems:**Are problems perceived as internal or external (caused by others, circumstance, etc.)?*

**[ ]** Predominantly internal

**[ ]** Mixed

**[ ]** Predominantlyexternal

*Agency and Responsibility: Is self or other discussed as agent of story? Does client take clear responsibility for situation?*

**[ ]** Strong sense of agency and responsibility

 **[ ]** Agency in some areas

**[ ]** Little agency; frequently blames others/situation

**[ ]** Often feels victimized

*Recognition and Expression of Feelings:**Are feelings readily recognized, owned, and experienced?*

**[ ]** Easily expresses feelings

**[ ]** Identifies feelings with prompting

**[ ]** Difficulty recognizing feelings

*Here-and-Now Experiencing:**Is the client able to experience full range of feelings as they are happening in the present moment?*

**[ ]** Easily experiences emotions in present moment

**[ ]** Experiences some present emotions with assistance

**[ ]** Difficulty with present moment experiencing

*Personal Constructs and Facades:**Is the client able to recognize and go beyond roles? Is identity rigid or tentatively held?*

**[ ]** Tentatively held; able to critique and question

**[ ]** Some awareness of facades and construction of identity

**[ ]** Identity rigidly defined; seems like “fact”

*Complexity and Contradictions:**Are internal contradictions owned and explored?**Is client able to fully engage the complexity of identity and life?*

**[ ]** Aware of and resolves contradictions

**[ ]** Some recognition of contradictions

**[ ]** Unaware of internal contradictions

*Shoulds:**Is client able to question socially imposed shoulds and oughts?**Can client balance desire to please others and desire to be authentic?*

**[ ]** Able to balance authenticity with social obligation

**[ ]** Identifies tension between social expectations and personal desires

**[ ]** Primarily focuses on external shoulds

*List shoulds:*

*Acceptance of Others:**Is client able to accept others and modify expectations of others to be more realistic?*

**[ ]** Readily accepts others as they are

**[ ]** Recognizes expectations of others are unrealistic but still strong emotional reaction to expectations not being met

**[ ]** Difficulty accepting others as is; always wanting others to change to meet expectations

*Trust of Self:**Is client able to trust self as process (rather than a stabile object)?*

**[ ]** Able to trust and express authentic self

**[ ]** Trust of self in certain contexts

**[ ]** Difficulty trusting self in most contexts

**Existential Analysis**

*Sources of Life Meaning (as described or demonstrated by client):*

*General Themes of Life Meaning:*

**[ ]** Personal achievement/work

**[ ]** Significant other

**[ ]** Children

[ ]  Family of origin

[ ]  Social cause/contributing to others

[ ]  Religion/spirituality

**[ ]** Other:

*Satisfaction with and clarity on life direction:*

**[ ]** Clear sense of meaning that creates resilience in difficult times

**[ ]** Current problems require making choices related to life direction

**[ ]** Minimally satisfied with current life direction; wants more from life

**[ ]** Has reflected little on life direction up to this point; living according to life plan defined by someone/something else

**[ ]** Other:

**Gestalt Contact Boundary Disturbances**

**[ ]** *Desensitization:* Failing to notice problems

**[ ]** *Introjection*: Take in others’ views whole and unedited

**[ ]** *Projection*: Assign undesired parts of self to others

**[ ]** *Retroflection*: Direct action to self rather than other

**[ ]** *Deflection*: Avoid direct contact with another or self

**[ ]** *Egotism:* Not allowing outside to influence self

**[ ]** *Confluence*: Agree with another to extent that boundary blurred

 *Describe:*

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| VII. Cognitive-Behavioral Conceptualization  |

**Baseline of Symptomatic Behavior**

*Symptom #1* (behavioral description):

Frequency:

Duration:

Context(s):

Events Before:

Events After:

*Symptom #2* (behavioral description):

Frequency:

Duration:

Context(s):

Events Before:

Events After:

**A-B-C Analysis of Irrational Beliefs**

*Activating Event (“Problem”):*

*Consequence (Mood, behavior, etc.):*

*Mediating Beliefs (Unhelpful beliefs about event that result in C):*

1.

2.

3.

**Beck’s Schema Analysis**

 *Identify frequently used cognitive schemas:*

*[ ]  Arbitrary inference:*

*[ ]  Selective abstraction:*

*[ ]  Overgeneralization:*

*[ ]  Magnification/Minimization:*

*[ ]  Personalization:*

*[ ]  Absolutist/dichotomous thinking:*

*[ ]  Mislabeling:*

*[ ]  Mindreading:*

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| **VIII. Family Systems Conceptualization** |

**Family Life Cycle Stage**

[ ]  Single adult

[ ]  Marriage

[ ]  Family with Young Children

[ ]  Family with Adolescent Children

[ ]  Launching Children

[ ]  Later Life

Describe struggles with mastering developmental tasks in one of these stages:

**Boundaries with**

*Parents* [ ]  Enmeshed [ ]  Clear [ ]  Disengaged [ ]  NA: *Describe:*

*Significant Other* [ ]  Enmeshed [ ]  Clear [ ]  Disengaged [ ]  NA: *Describe:*

*Children* [ ]  Enmeshed [ ]  Clear [ ]  Disengaged [ ]  NA: *Describe:*

*Extended Family* [ ]  Enmeshed [ ]  Clear [ ]  Disengaged [ ]  NA: *Describe:*

*Other:* *Name* [ ]  Enmeshed [ ]  Clear [ ]  Disengaged [ ]  NA: *Describe:*

 *Typical style for regulating closeness and distance with others:*

**Triangles/Coalitions**

[ ]  Coalition in family of origin: *Describe:*

[ ]  Coalitions related to significant other: *Describe:*

[ ]  Other coalitions:

**Hierarchy between Self and Parent/Child**[ ]  NA

With own children [ ]  Effective [ ]  Rigid [ ]  Permissive

With parents (for child/young adult) [ ]  Effective [ ]  Rigid [ ]  Permissive

**Complementary Patterns with** **Name:**

[ ]  Pursuer/distancer

[ ]  Over/under-functioner

[ ]  Emotional/logical

[ ]  Good/bad parent

[ ]  Other: *Describe*

*Example of complementary pattern*:

**Intergenerational Patterns**

Substance/Alcohol Abuse: [ ]  NA [ ]  History:

Sexual/Physical/Emotional Abuse: [ ]  NA [ ]  History:

Parent/Child Relations: [ ]  NA [ ]  History:

Physical/Mental Disorders: [ ]  NA [ ]  History:

Family strengths: Describe:

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| IX. Solution-Based and Cultural Discourse Conceptualization (Postmodern) |

**Solutions and Unique Outcomes**

*Attempted Solutions that DIDN’T or DON’T work*:

1.

2.

3.

*Exceptions and Unique Outcomes*: Times, places, relationships, contexts, etc. when problem is less of a problem; behaviors that seem to make things even slightly better:

1.

2.

3.

*Miracle Question Answer:* If the problem were to be resolved overnight, what would client be doing differently the next day? (Describe in terms of doing X rather than not doing Y).

1.

2.

3.

*Dominant Discourses* informing definition of problem:

* *Ethnic, Class and Religious Discourses: How do key cultural discourses inform what is perceived as a problem and the possible solutions?*
* *Gender and Sexuality Discourses: How do the gender/sexual discourses inform what is perceived as a problem and the possible solutions?*
* *Community, School, and Extended Family Discourses: How do other important community discourses inform what is perceived as a problem and the possible solutions?*

*Identity Narratives*: *How has the problem shaped each client’s identity?*

*Local or Preferred Discourses: What is the client’s preferred identity narrative and/or narrative about the problem? Are there local (alternative) discourses about the problem that are preferred?*