

Case Conceptualization Outline

This is a guide for client case conceptualization presentations. The information is to be typewritten with the exception of the genogram. Headings are to be used and information is to be concise. Please be sure to refer to your Field Experience Manual regarding confidentiality requirements as you prepare this document, and make sure you exclude any potentially identifiable information.

Please include the following information:

Background Information:

- Client pseudonym or initials (do not use real names)
- Age – chronological and developmental ages
- Gender (client's identified gender)
- Sexual orientation (e.g. asexual, bisexual, heterosexual, homosexual, pansexual, etc.)
- Religious or spiritual affiliations
- Relationship/Marital status and years together
- Highest level of education completed/current grade
- Occupation(s)
- Medical condition(s)
- Mental health diagnosis(es)
- Disability(ies) and special needs
- History of chemical dependency and addiction(s) (e.g. alcohol, porn, food, etc.)
- History of abuse and trauma (e.g. physical, sexual, financial, etc)
- History of self-harming and/or high risk behaviors
- History of suicidal ideations and/or attempts
- Previous therapy, counseling, treatment, and/or hospitalizations for mental health concerns

Referral and Presenting Concern(s):

- Date of Initial Session
- Number of Sessions Attended
- Who referred the client for counseling (e.g. self, school, friend, relative, etc.)?
- What are the primary concerns for seeking services (e.g. discordant relationships, family dynamics, depression infidelity, medical stressors, etc.)?

History of the Concern(s):

- How long has the client(s) had these concerns?
- When did it begin and under what circumstances?
- Discuss previous attempts at seeking assistance for these concerns

Current Situation:

- Summarize pertinent information about how the concerns are impacting the client, relationships, and other life areas
- Describe the severity level of the concerns for the client
- Why is help being sought now?
- Describe the client in Adlerian terms (e.g. social interest, horizontal/vertical striving, etc.)

Treatment Plan:

- The plan should include client goals and strategies for achieving treatment goals

Couple/Family History:

- Identify family members, ages, and roles in the family
 - Include miscarriages, deaths, adoption, divorce, marriages, etc.
- Describe where the family is in the family life cycle
- Identify relevant circumstances that may have impact on the system
 - Cultural or ethnic belonging
 - Religious/Spiritual affiliations
 - Social Economic Status (SES)
 - Parental and sibling characteristics and interactions
 - Significant changes and stressors (positive or negative)
- Describe the child(ren)'s:
 - School adjustment
 - Special needs, disabilities, and/or giftedness
 - Whether there has been out-of-home placement, or adoption of this child or siblings
 - Identify the children's mistaken goal from the four goals of misbehavior.
- Describe parenting styles and methods of discipline
- History of substance use or mental illness in the family
- Describe whether there has been or currently is financial stress
- History of abuse and domestic violence
- Identify any military history and its impact on the family
- Identify each person's current investment in the relationship
- Identify strengths, limitations, and growth areas of the client and family members
- Identify interest, hobbies, and activities
- Any other important information

Family Boundaries and Patterns:

- Describe the following:
 - Style of relating
 - Boundaries between family members
 - Unique alignments or estrangements
 - Triangles/coalition
 - Hierarchy
 - Complementary patterns
 - Communication stances/styles
 - Divorce indicators
 - Attachment styles and patterns between family members

Genogram, Family Map or Suitable Alternative:

- Attach a genogram that includes at least three generations of the client's family

Early Recollections:

- Complete 2 or more ERs
- Identify patterns, mistaken beliefs, work view, etc.

Help Needed:

- Identify specific ways in which you would like assistance with this case (e.g. assessment, treatment planning, role playing interventions and techniques, etc.)