

Cross-Theoretical Systemic Case Conceptualization 3.0

For use with individual, couple, or family clients

Date: _____ Clinician: _____ Client/Case #: _____

Introduction to Client & Significant Others

Identify significant persons in client's relational/family life who will be mentioned in case conceptualization:

Adults/Parents: Select identifier/abbreviation for use in rest of case conceptualization

Identifier: Select Gender Age: _____ Select Ethnicity Relational Status Occupation: _____ Other: _____

Identifier: Select Gender Age: _____ Select Ethnicity Relational Status Occupation: _____ Other: _____

Children/Adult Children: Select identifier/abbreviation for use in rest of case conceptualization

Identifier: Select Gender Age: _____ Select Ethnicity Grade: Select Grade Other: _____

Identifier: Select Gender Age: _____ Select Ethnicity Grade: Select Grade Other: _____

Identifier: Select Gender Age: _____ Select Ethnicity Grade: Select Grade Other: _____

Identifier: Select Gender Age: _____ Select Ethnicity Grade: Select Grade Other: _____

Others: Identify all: _____

Presenting Concerns

Describe each significant person's description of the problem:

Identifier: _____

Identifier: _____

Identifier: _____

Identifier: _____

Additional: _____

Broader System: Description of problem from extended family, referring party, school, legal system, etc.:

Extended Family: _____

Name: _____

Name: _____

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, medical/mental health history, etc.): _____

Client/Family Strengths and Social Location

Strengths and Resources:

Personal: _____

Relational/Social: _____

Spiritual: _____

Based on the client's social location—age, gender race, ethnicity, sexual orientation, gender identity, social class, religion, geographic region, language, family configuration, abilities, etc.--identify potential resources and challenges:

Unique Resources: _____

Potential Challenges: _____

Family Structure

Family Life Cycle Stage (Check all that apply):

- Single Adult
- Committed Couple
- Family with Young Children
- Family with Adolescent Children
- Divorce
- Blended Family
- Launching Children
- Later Life

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

Boundaries with/between:

- | | | | | | | | | |
|----------------------|--------------------------|----------|--------------------------|-------|--------------------------|------------|--------------------------|-------------------|
| Primary couple | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |
| Select & Children | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |
| Select & Children | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |
| Siblings | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |
| Extended Family | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |
| Friends/Peers/Others | <input type="checkbox"/> | Enmeshed | <input type="checkbox"/> | Clear | <input type="checkbox"/> | Disengaged | <input type="checkbox"/> | NA Example: _____ |

Triangles/Coalitions:

- Cross-generational coalitions: Describe: _____
- Other coalitions: _____

Hierarchy between Parents and Children: NA

Select: Effective Insufficient (permissive) Excessive (authoritarian) Inconsistent

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Description/Example to illustrate hierarchy: _____

Complementary Patterns between _____ and _____:

- Pursuer/distancer
- Over/under-functioner
- Emotional/logical
- Good/bad parent
- Other: _____

Example of pattern: _____

Interactional Patterns

Primary Pathologizing Interpersonal Pattern (PIPs; A □ B): Describe dynamic of primary PIP:

- Pursuing/Distancing Criticizing/Defending Controlling/Resisting Other: _____

Describe Start of Tension: _____

Describe Conflict/Symptom Escalation: _____
Describe Return to "Normal"/Homeostasis: _____

Hypothesized homeostatic function of presenting problem: How might the symptom serve to maintain connection, create independence/distance, establish influence, reestablish connection, or otherwise help organize the family?

Intergenerational & Attachment Patterns

Construct a family genogram and include all relevant information including:

- Names, ages and birth/death dates
- Relational patterns
- Occupations
- Psychiatric disorders and alcohol/substance abuse
- Abuse history
- Personality adjectives

Genogram should be attached to report. Summarize key findings below:

Substance/Alcohol Abuse: NA History: _____

Sexual/Physical/Emotional Abuse: NA History: _____

Parent/Child Relations: NA History: _____

Physical/Mental Disorders: NA History: _____

History Related to Presenting Problem: NA History: _____

Describe family strengths, such as the capacity to self-regulate and to effectively manage stress: _____

Describe typical attachment behavior when person does not feel secure in relationships; include Satir survival stances (placating, blaming, superreasonable, and irrelevant) used in description.

Identifier:: Anxious Avoidant Anxious/Avoidant. Frequency: Select Describe: _____

Additional: _____

Solution-Based Assessment

Attempted Solutions that DIDN'T work:

1. _____
2. _____
3. _____

Exceptions and Unique Outcomes (Solutions that DID work): 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. _____

Postmodern: Social Location and Dominant Discourses

Describe the client(s) overall social location (the groups a person belongs to based on diversity factors) and influential dominant discourses related to presenting concerns:

- **Ethnic, Race, Class, Immigration Status, and Religious Discourses:** How do key cultural discourses inform client identity(ies), what is perceived as the problem, and possible solutions (specify ethnicity, e.g. Italian American rather than White or Caucasian)? _____
- **Gender and Sexuality Discourses:** How do gender and sexuality discourses inform identity(ies), what is perceived as a problem and the possible solutions? Do these intersect with ethnicity and/or religion? _____
- **Community, School, Work and/or Extended Family Discourses:** How do other important community discourses inform identity(ies), what is perceived as a problem and the possible solutions? _____
- **Identity Narratives:** How has the problem shaped each significant person's identity? _____

Client Perspectives (Optional)

Areas of Agreement: Based on what the client(s) has(ve) said, what parts of the above assessment do they agree with or are likely to agree with? _____

Areas of Disagreement: What parts do they disagree with or are likely to disagree with? Why? _____

How do you plan to respectfully work with areas of potential disagreement? _____