

Strategic-Systemic Case Conceptualization 4.0

For use with individual, couple, or family clients

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

Introduction to Client & Significant Others

List all significant others who will be included in the case conceptualization.

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

Adult(s)

Adult Age: _____ Gender: _____ Ethnoracial Identity: _____ Select Status Occupation: _____ Additional identifiers: _____

Adult Age: _____ Gender: _____ Ethnoracial Identity: _____ Select Status Occupation: _____ Additional identifiers: _____

Child(ren)

Child Age: _____ Gender: _____ Ethnoracial Identity: _____ School/Grade: _____ Additional identifiers: _____

Child Age: _____ Gender: _____ Ethnoracial Identity: _____ School/Grade: _____ Additional identifiers: _____

Child Age: _____ Gender: _____ Ethnoracial Identity: _____ School/Grade: _____ Additional identifiers: _____

Others in Household/Family/Significant Persons: _____

Presenting Concerns

Client's Description(s) of Problem(s) (focus on OBSERVABLE behaviors):

Adult Age: _____

Adult Age: _____

Child Age: _____

Child Age: _____

Child Age: _____

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 (earlier incidents, family history, related issues, prior treatment, etc.): _____

Interactional Patterns

What is the problem interaction pattern related to the problem scenario? Behaviorally describe each party's role in the sequence: rise of tension, escalation, symptom, return to normal. If presenting issue is intrapsychic, describe the client's behavioral sequence related to the symptoms.

Provide a description of a single incident that is characteristic of the primary problem.

- Describe "Normal"/Baseline behaviors related to symptom: _____
- Describe start of Tension/Symptom: _____
- Describe height of Tension/Symptom: _____
- Describe return to "Normal"/Baseline: _____

Complementary Roles

Complementary Patterns between _____ and _____:

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

Example of pattern(s): _____

Hypothesis: Role of Symptom in System

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

Family Life Cycle

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: _____

Attempted Solutions

Attempted Solutions that DIDN'T work:

1. _____
2. _____
3. _____

Social Location

Describe how the client's social location and related issues of power and marginalization inform the problem interaction cycle (e.g., cultural, gender, immigration status, economic class, sexual/gender orientation, religion, ability):
