

Sample Case Consultation/Conceptualization Format

Name of Presenter: _____

Date: _____

Client demographics: (preferred gender, age, Race/ Ethnicity, relationship status, number and ages of children, occupation, employment status etc) _____

Presenting problem: _____

Short summary of the session: _____

Important history or environmental factors : _____

Tentative assessment or problem conceptualization (diagnosis): _____

Plan of action and goals for treatment (treatment plan): _____

Intervention strategies:

Concerns or problems surrounding this case (e.g., ethical concerns, relationship issues): _____