



The Complex Case Formulation Worksheet

Part 1: The Patient Basics

1. Provide a brief biopsychosocial synopsis of the patient.

Include demographics, diagnostic history, symptoms bringing them into treatment, synopsis of lived experience, past treatment engagement, and current living and interpersonal context.

2. What brought the patient to YOU? What was their stated goal at the beginning of treatment?

3. What are the most prominent patterns in each domain:

- How do they experience (or shut down) emotions?

- Interpersonal relationships

- Are there patterns of how they make meaning of adverse events, traumatic experience, ongoing stressors?

- Do they have a sense of clear identity? What do they think of themselves?

- Any trauma-specific symptoms (focus here on panic attacks, flashbacks, dissociation)

4. What appears to trigger problematic behaviors or patterns?

5. What function might the behavior serve? What maintains the current pattern?

Part II: The Transference Dyad

6. What happens in the therapeutic relationship?

- What does the patient evoke in you emotionally? What urges do you feel in the session?

- Are there visible ways (verbals, nonverbals) that the patient elicits these feelings?

- How do they respond to you when you ask questions, when you challenge, when you provide validation?

- Are any of the above attributable to YOUR own characteristics, lived experience, personal patterns, or vulnerability factors (ie tired, hungry, ongoing stress, interpersonal stressors)?

- Internal experiences above minus any therapist-only contributions, what interpersonal pattern might be emerging between you and the patient?

Part III: The Working Formulation

7. What does the patient *need* from treatment?

(Include your perception of their need is in addition to their perception of what they need)

8. What is your working formulation so far?

(Include which theoretical orientation you see the patient through)

9. What interventions have been attempted?

- What helped?
 - What didn't?
 - What may have unintentionally reinforced the problem? This may include something that settles intensity in the short-term but does not lead to behavior change
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10. What are you still unsure about?

Still stuck?

Consultation focuses on in-depth case formulation, short-term and long-term treatment planning, and milieu management. Reach out to Dr. Cimino at Cimino@ClinicalClarityConsult.com!