

Extended Case Formulation Worksheet

The *Extended Case Formulation* is a CBT case conceptualisation worksheet. In psychological treatment, a case formulation allows therapist and client to come to a shared understanding of the client's presenting problem.

The four "P's" of case formulation (**predisposing, precipitating, perpetuating, and protective factors**) provide a useful framework for organising the factors that may be contributing to the development and maintenance of the problem.

This worksheet is an extended version of the *Case Formulation* worksheet. as well as identifying the four "P's" of the presenting problem, an analysis of the client's thoughts, feelings, behaviors, and physical sensations associated with a specific here-and-now situation is included.

This allows for a more comprehensive case formulation that helps the therapist connect the dots between the clients' childhood experiences, the development of core beliefs, and the ways in which clients cope with their negative beliefs.

This worksheet is designed to be completed by the therapist only, based on information provided by the client in session.

This two-part worksheet includes 9 steps. Part A is designed to gather data on problematic situations that are quite typical for the client, and Part B is designed to explore the mechanisms underlying these problematic situations.

Part A should be repeated at least three times using different problematic situations so that the therapist can begin to understand the client's dysfunctional patterns of thinking and behaving.

Part A (X3)

1. **Identify a problematic situation**
2. **Identify automatic thoughts.** Note that according to CBT, it is the interpretation of a situation (rather than the situation itself), often expressed in automatic thoughts, influences one's subsequent emotion, behavior, and physiological response.
3. **Identify the meaning of those automatic thoughts**
4. **Identify what emotion(s) was associated with the automatic thought**
5. **Identify accompanying physical sensations**
6. **Explore how the client behaved as a result**

Part B

7. **Clarify the presenting problem**
8. **Identify which early experiences** may have contributed to the development and maintenance of the presenting problem
9. **Identify the client's most central dysfunctional beliefs** about him/herself related to the presenting problem
10. **Identify which assumptions, rules, and attitudes help him/her cope with these core belief(s).** These implicit or explicit beliefs can perpetuate the behavior, even if it is not helpful or adaptive. Rules are if-then statements that provide a judgment based on a set of circumstances. For instance, you may have the rule "If I do not do something perfectly, I'm a complete failure."
11. **Identify the client's maladaptive coping strategies**, and determine if they helping him/her to effectively pursue personal goals.
12. **List the factors that can help** the client deal with the problematic behavior, and perhaps help him/her break the perpetuating cycle. This can be things that help you cope once the thought or behavior arises or things that can disrupt the pattern once it is in motion.

Extended Case Formulation

Worksheet

PART A

“The Problem”

Early Experiences

Core Belief(s)

Conditional assumptions/rules/attitudes

Maladaptive coping strategies

Positives

PART B

