

## Brief Case Conceptualization and Treatment Planning Chart

<b>Client Values and Treatment Goals:</b>		
<b>Clinical Team:</b>		
<b>Aspect of Clinical Presentation</b>	<b>Ex-CBT or Augmentation Strategy</b>	<b>Target</b>
1.		
2.		
3.		
<b>Advocacy Strategies:</b>		
<b>Engagement Strategies:</b>		

**Example Case Conceptualization and Treatment Planning Chart for Case #1:** *An 8-year-old male who recently immigrated from Mexico is experiencing anxiety around leaving his mother and going out in public, including excessive reassurance seeking from his mother about whether she will be safe. Upon further assessment, it becomes clear that he is afraid of his mother being deported. From further assessment, we learned that the client's caregiver is undocumented and that child's concerns and fears are getting in the way of him leaving the house, even to go to school. So, while exposure practice can be helpful, additional strategies to support the family with immigration related stressors are also necessary.*

### Example Case Conceptualization and Treatment Planning Chart for Case #1:

<b>Client Values and Treatment Goals:</b> Mom and client both want client to “feel less stressed” and be able to engage in school and other activities. Client’s mother is particularly concerned about her son’s avoidance of school and wants her son to trust her and leave the worrying to her.		
<b>Clinical Team:</b> Mother, Therapist, Caseworker, School Counselor		
Aspect of Clinical Presentation	Ex-CBT or Augmentation Strategy	Target
1) Maladaptive avoidance	Exposure	Learn to cope with anxiety provoking situations (decided upon with the family as safe) to reach client’s goal of attending school
2) Experiencing isolation related to maladaptive and adaptive avoidance	Connect to strengths-based activities (e.g., supporting family events, engagement in community, or other preferred activities)	Increase sense of belonging and social support
3) Chronic worries about his mother’s safety	Mindfulness strategies Worry sorting	Reduce physiological arousal and focus on chronic worries by

		engaging in present moment awareness (e.g., grounding techniques)
4) Physiological distress (stomach aches, headaches) associated with chronic worry and difficulty sleeping	Relaxation strategies	Reduce physiological arousal to cope with chronic environmental stressors (e.g., breathing and muscle relaxation skills before bed)
5) Identity and environmental stressors	Client advocacy and empowerment	Help family connect to advocacy groups for immigrant families to support systemic change
6) Identity and environmental stressors	Planning for emotional and physical safety	Find spaces that feel safe to client and his mother, where ICE or police involvement is unlikely
<b>Advocacy Strategies:</b>		
Challenges with the immigration process	Connect to a caseworker	Support the family with legal support for the immigration process
<b>Engagement Strategies:</b>		
Transportation challenges	Offer flexible scheduling (hybrid telehealth)	Reduce or eliminate transportation barriers
Mistrust of the medical system, fear of being reported	Extended concentrated rapport and trust building	Build trust and rapport to engage in treatment