Clinical Formulation Cheat Sheet

Past and Current Mental Health Issues:
- DSM-5 dx
- Past trauma
- Self-esteem, self-worth, and self-acceptance issues
- Current support system

Socioeconomic Status:
- Income level
- Education
- Occupations
- Place of residence

Cultural Background:
- Religiosity
- Race
- Ethnicity
- Cultural identity
- Family of origin culture:
  - Relationship models associated with primary care giver
  - Exposure to infidelity within the family system
  - Impact of family of origin on relationship worldview and adult attachments

Sexual Health and Identity:
- Sexual Orientation
- Any performance, desire, pain conditions
- Menopause/Andropause
- Hormone Therapy

Major Life Events (Positive or Negative):
- Diagnosis of a major medical issue
- Newborn
- Promotion
- Death of a family member or a major loss
Clinical Formulation Cheat Sheet

Past Relationships History:

- How many long-term past relationships have you had?
- How long did each relationship last?
- How and why did these relationships end?
- Were there any incidents of infidelity in these relationships?
- If yes, how was the infidelity discovered, how was it handled, and how did it impact both parties?
- Did any of these past relationships have any impact on the dyad’s current relationship struggle? Please describe the impact?

Current Relationship History:

- What were their circumstances that led to starting the current relationship?
- How and why did the relationship progress to the point of exclusivity?
- What are some of the significant events and milestone in the current relationship and how did these events impact the relationship?
- Were there any significant events that impacted the clients level of satisfaction in the relationship?
- How did the clients handle these issues? Did any of these issues contribute to the current infidelity behavior?

Relationship Dynamics:

How does the couple fare in the following areas:

- Compatibility
- Communication
- Conflict resolution
- Managing life stressors and adapting to change
- Level of investment
- Equality