

Clinical Treatment Plans

Clinical treatment plans provide a straightforward, comprehensive overview of treatment. They include the following parts:

- **Introduction:** Defines who is being treated, if medications are being used, and what contextual factors were considered in creating a plan that is sensitive to client needs.
- **Therapeutic Tasks:** Describes treatment tasks that the therapist should perform at the initial, working, and closing phases of therapy. These tasks are informed by theory as well as ethical and legal requirements.
- **Client Goals:** Determines what goals are unique to each client and what behaviors, thoughts, feelings, or interactions will be either increased or decreased as a result of treatment. Client goals are derived from the assessment of the presenting problem and are stated in theory-specific language.
- **Interventions:** Describes, for each goal, two to three interventions for achieving this goal using the therapist's chosen theory.
- **Client Perspective:** Describes areas of client agreement and concern with the outlined plan.

Here is the general treatment plan format. In this form, *TT* refers to "therapeutic task," and *I* refers to "intervention."

TREATMENT PLAN	
Therapist: _____	Client ID #: _____
Theory: _____	
Primary Configuration: <input type="checkbox"/> Individual <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Group _____	
Additional: <input type="checkbox"/> Individual <input type="checkbox"/> Couple <input type="checkbox"/> Family <input type="checkbox"/> Group: _____	
Medication(s): <input type="checkbox"/> NA <input type="checkbox"/> _____	
Contextual Factors considered in making plan: <input type="checkbox"/> Age <input type="checkbox"/> Gender <input type="checkbox"/> Family dynamics	
<input type="checkbox"/> Culture <input type="checkbox"/> Language <input type="checkbox"/> Religion <input type="checkbox"/> Economic <input type="checkbox"/> Immigration <input type="checkbox"/> Sexual orientation	
<input type="checkbox"/> Trauma <input type="checkbox"/> Dual dx/comorbid <input type="checkbox"/> Addiction <input type="checkbox"/> Cognitive ability	
<input type="checkbox"/> Other: _____	
Describe how plan is adapted to contextual factors: _____	

I. Initial Phase of Treatment (First 1–3 Sessions) I.A. Initial Therapeutic Tasks Therapeutic Relationship TT1: Develop therapeutic relationship with all members. Note: _____ I1: Intervention: _____	

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I. Initial Phase of Treatment (First 1–3 Sessions)**I.A. Initial Therapeutic Tasks****Assessment**

TT2: Assess individual, system, and broader cultural dynamics. Note: _____

I1: Intervention: _____

I2: Intervention: _____

Goals

TT3: Define and obtain client agreement on treatment goals. Note: _____

I1: Intervention: _____

Referrals and Crisis

TT4: Identify needed referrals, crisis issues, and other client needs. Note: _____

I1: Intervention: _____

I.B. Initial Client Goals (1–2 Goals): Manage crisis issues and/or reduce most distressing symptoms.**Goal #1:** ☐ Increase ☐ Decrease _____ (personal/relational dynamic) to reduce _____ (symptom).*Measure:* Able to sustain _____ for period of _____ ☐ wks ☐ mos with no more than _____ mild episodes of _____.

I1: Intervention: _____

I2: Intervention: _____

II. Working Phase of Treatment (Sessions 2+)**II.A. Working Therapeutic Tasks****Monitor Progress**

TT1: Monitor progress toward goals. Note: _____

I1: Intervention: _____

Monitor Relationship

TT2: Monitor quality of therapeutic alliance as therapy proceeds. Note: _____

I1: Intervention: _____

II.B. Working Client Goals (2–3 Goals): Target individual and relational dynamics in case conceptualization using theoretical language (e.g., reduce enmeshment, increase differentiation, increase agency in relational narrative, etc.).

Goal #1: ☐ Increase ☐ Decrease _____ (personal/relational dynamic) to reduce _____ (symptom).

Measure: Able to sustain _____ for period of _____ ☐ wks ☐ mos with no more than _____ mild episodes of _____.

I1: Intervention: _____

I2: Intervention: _____

Goal #2: ☐ Increase ☐ Decrease _____ (personal/relational dynamic) to reduce _____ (symptom).

Measure: Able to sustain _____ for period of _____ ☐ wks ☐ mos with no more than _____ mild episodes of _____.

I1: Intervention: _____

I2: Intervention: _____

Goal #3: ☐ Increase ☐ Decrease _____ (personal/relational dynamic) to reduce _____ (symptom).

Measure: Able to sustain _____ for period of _____ ☐ wks ☐ mos with no more than _____ mild episodes of _____.

I1: Intervention: _____

I2: Intervention: _____

III. Closing Phase of Treatment (Last 2+ Weeks)

III.A. Closing Therapeutic Tasks

Termination Plan

TT1: Develop aftercare plan and maintain gains. Note: _____

I1: Intervention: _____

III.B. Closing Client Goals: Determined by theory's definition of health.

Goal #1: ☐ Increase ☐ Decrease _____ (personal/relational dynamic) to reduce _____ (symptom).

Measure: Able to sustain _____ for period of _____ ☐ wks ☐ mos with no more than _____ mild episodes of _____.

I1: Intervention: _____

I2: Intervention: _____

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IV. Client Perspective

Has treatment plan been reviewed with client? ☐ Yes ☐ No; If no, explain: _____

Describe areas of client agreement and concern: _____