**CHAMP BA *Formal* Case Formulation Guide**

Patient Initials: \_\_\_\_\_\_\_ / CM Initials: \_\_\_\_\_\_\_\_ / Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1. Patient characteristics and stressors**

Age: \_\_\_\_\_\_\_ Gender: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Race/Ethnicity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sexual orientation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Relationship status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Living situation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employment status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Educational attainment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do they have children? If so, describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any other noteworthy characteristic(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Prominent Stressors: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Mental Health, Substance Use, and Pain Information**

Mental Health and SUD Diagnoses and severity at entry to Collaborative Care:

|  |  |  |
| --- | --- | --- |
| Diagnosis | Measure | Score |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Chronic pain at entry to Collaborative Care:

Nature of their substance use at entry to Collaborative Care (comments could include types of substances used, routes of administration, level of harm or severity of consequences associated with use):

Primary motives for substance use:

Primary concerns regarding mental health issues and/or substance use:

Mental Health Diagnoses once OUD is stable:

Chronic pain once OUD is stable:

**3. Mastery and Pleasure**

*Mastery Considerations*

Current (and/or past) Strengths and Abilities:

*Pleasure/Enjoyment Considerations*

What does (or did) your patient find Enjoyable or Pleasurable?

**4. Social Support**

What is the nature of your patient’s social support? (e.g., Who in their life can they turn to? Do they have people they can do things with? Are there relationships that are strained?, etc.)

**5. BA Goals**

What is your patient’s answer(s) to the question: “What would you like to see happen for yourself during this treatment?”

What are their goals for their substance use?

What goals are they working on to bring more mastery and pleasure into their lives?

**6. Barriers and Facilitators of Goal Attainment**

What are likely mental health, substance use, and contextual circumstances that could pose challenges for you patient in addressing or meeting their goals?

What strengths and supports does your patient have that could facilitate them addressing or meeting their goals?