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# Therapist Guide: Longitudinal Formulation Worksheet

## Purpose & Rationale

The Longitudinal Formulation worksheet helps clients connect past experiences, core beliefs, and current thinking/behavioural patterns. It is a structured way of mapping how life history contributes to present difficulties, and how thoughts, feelings, and behaviours maintain cycles of distress. This tool is commonly used in **CBT case formulation** to foster shared understanding between therapist and client, guide treatment planning, and identify targets for intervention.

## When to Use

- Early in therapy to collaboratively build a case formulation.
- With clients who struggle to see how past experiences influence present problems.
- To highlight maintenance cycles (thoughts–feelings–behaviours) contributing to distress.
- When reviewing progress or setting treatment goals.
- As part of relapse prevention planning.

## How to Introduce It

1. **Explain the purpose:**
    - *"This worksheet helps us look at the bigger picture—how your past experiences and beliefs affect the way you interpret events today, how you feel, and how you respond. Understanding this can help us see patterns and find new ways of coping."*
2. **Fill in the sections together:**
    - **What happened? (Events):** Describe a recent triggering event. Keep it concrete.
    - **How I interpret the events (Thoughts):** Capture automatic thoughts or assumptions about the event.
    - **Beliefs (Core Beliefs):** Identify deeper, global beliefs about self, others, or the world that shape interpretations (e.g., *"I'm not good enough," "Others can't be trusted"*).
    - **Life Experiences:** Connect to earlier experiences that may have shaped these beliefs (e.g., *childhood criticism, trauma, bullying*).
    - **What I do (Behaviours/Responses):** Explore coping behaviours that follow (e.g., avoidance, withdrawal, reassurance seeking).
    - **How I feel (Feelings):** Record emotional reactions (e.g., *anxious, sad, ashamed*).
3. **Highlight links between sections:**
    - Show how life experiences → core beliefs → interpretations → feelings/behaviours create a cycle that maintains problems.
4. **Collaboratively discuss targets for change:**
    - Which beliefs might be tested or modified?
    - Which behaviours could be adjusted?
    - How can therapy intervene at different points in the cycle?

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**Therapeutic Goals**

- Develop a shared understanding of the client's difficulties.
- Normalize problems by showing how they make sense given past experiences.
- Identify unhelpful core beliefs and behavioural patterns.
- Build motivation for change by clarifying how patterns are maintained.
- Guide intervention planning (cognitive restructuring, behavioural experiments, schema work, skills training).

**Clinical Tip:** This worksheet can feel intense for some clients, especially when linking present problems to painful life experiences. Pace the discussion carefully, validate distress, and balance focus on past vulnerability factors with current strengths and resilience.