



CNL-605: Biopsychosocial Assessment Template

Client's Name: Josh

Date: 8/16/2025

DOB: Select or enter the client's DOB here.

Age: 24

Start Time: 1pm

End Time: 1:45pm

Identifying Information:

Patient is a 24-year-old Caucasian male. He is a college student on track to graduate in the next six months, majoring in accounting. Patient is dressed business casual with a polo and dress pants. Patient appears to be healthy and mentioned that he's started a diet and has been working out at the gym. Patient states he has low motivation and energy and talks in a low, calm voice. He said that he has a girlfriend and works at a family business part-time while attending school. He stated that his Grandma owns the company and that she is like a mentor to him. His parents are currently going through a divorce. He lives in an apartment after moving out of the dorms. No religious or spiritual discussions, but the client mentioned that he played guitar for a Christian band for years and enjoyed

Presenting Problem/Chief Complaint:

Patient states that he is not motivated, has low energy, and no clear focus. He states that he often loses attention to details, thinks about worst-case scenarios, and has a hard time doing things such as schoolwork, going to classes, or staying in class. He said he often freezes up or avoids stuff he has to work on. He tends to get things done at the last minute when deadlines approach. He has become less social and has quit a business fraternity at school. He also states that he worries a lot, and his most significant stressors are finances and a move he plans to make to be near his girlfriend in Chicago. He also stated that at the age of 18, he had a more positive outlook on education and life,

Substance Use History:

Patient has no current or past substance or alcohol use.

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Addictions (i.e., gambling, pornography, video gaming):

Patient has no prior or current addictions.

Medical History/Mental Health History/Hospitalizations:

Patient has no medical issues. States that he gets plenty of sleep and wakes up well. He has also started a diet and exercises at the gym. He previously attended counseling and was diagnosed with mild depression and anxiety.

Abuse/Trauma History:

Patient has no past or current abuse events. He has stated that life triggers have been a break-up with a high school sweetheart, moving away from home, moving from a dorm at school to his apartment, and his parents' divorce.

Social History and Resources:

Josh stated that at the age of 18, he felt like he was going to take over the world. Early in college, he was social and was a part of a business fraternity that he helped start on his college campus. He went from being the social chair to not showing up. He took a semester off and never returned to the fraternity. He also played guitar in a Christian band for four to five years, but stopped that as well. His social outlets are his girlfriend and his grandmother. He states that his grandmother is like a

Legal History:

Patient has not had any past or current legal issues.



Educational History:

The patient has always been a good student. At the age of 18, he felt that he was going to take over the world. He attended ISU for a few years and later transferred to a smaller school to feel like the bigger fish in a small pond. Despite his reported low energy, lack of motivation, and focus issues, he continues to do his homework and calculate what he needs to earn an A in classes. He stated that at a younger age, he had a more positive mindset toward education, but now he has a different view of school. He sometimes struggles to attend class and then worries about what fellow students would think of him if he misses a class. He has been in college for six years and has changed majors three times. He is set to graduate with a degree in Accounting in the next six months. He reports no IEP or 504 plans needed for his education.

Family History:

Patient reports that Mom had postpartum depression and some anxiety. He also states that parents do not get along and are going through a divorce, so his parents could be experiencing other mental health challenges at this time.

Cultural Factors:

No cultural factors seem to play a part in the patient's current presenting problems. Patient is a Caucasian 24-year-old male.

Resources, Strengths, and Weaknesses:

Patient shows resilience in understanding cognitive behaviors and automatic thoughts and wants to work on his thoughts and behaviors. He has already created habits to help him attend classes and started a diet and exercise routine to help his energy. He also has a good relationship with his girlfriend and states that she's been a motivating factor to get things done. His grandmother is also a mentor to him. Patient showed motivation to work on his avoidance and was open to tracking his

Case Conceptualization (Conceptualize the case using your preferred theoretical orientation):

Josh is a 24-year-old Caucasian male in college, majoring in accounting. He has been in college for the past six years, switching majors three times and recently changing colleges. He presents today with no motivation, low energy, and a lack of focus that is affecting his school and social life. He worries and often thinks about worst-case scenarios, such as not graduating from college, failing, or his girlfriend breaking up with him. He previously attended counseling and was diagnosed with mild depression and anxiety. He also reports that his mom had postpartum depression and anxiety. He reports that his sleep and health are good. He has even started a new diet and works out at the gym. His presenting issues began two years ago when things started to become harder for him to do, such as attend class, stay in class, complete quizzes, and be social. He reports that triggers at that time were a break-up with a high school sweetheart, moving away from home, moving from a dorm to an apartment, and his parents' divorce. He is currently on track to graduate this year but still finds it hard to get things done. He continues to worry and focuses on worst-case scenarios. His current social community consists of his girlfriends, who he states motivates him to get things done, and his Grandmother, whom he describes as a mentor to him.

The patient's symptoms most likely align with major depressive disorder (MDD) and general

Clinical Justification:

The patient's lack of motivation, low energy, and focus issues align with MDD. The patient has diminished interest or pleasure in activities such as being social, playing his guitar, attending class, and staying at work. He also feels fatigued and has low energy almost every day and reports a lack of clear focus. These symptoms started two years ago and have continued to the present.

Patient also shares that he worries and thinks about worst-case scenarios all the time. This is congruent with Generalized Anxiety Disorder (GAD). He states that he freezes and sometimes overthinks his attendance in class. He feels that if he misses one class, then the professor and all the students will notice and think less of him. He also worries that he will fail, and then his girlfriend will break up with him. He often wants to leave work early because he's afraid that he won't get to school on time to relax and prepare for class. The excessive worrying about several events that have lasted for the past two years and difficulty controlling worry are congruent with GAD. His fatigue, freeze and difficulty concentrating are also criteria for GAD.

Initial Diagnosis (DSM-5):

Principal Diagnosis:	ICD-10 Code:	DSM-5 Disorder:	Subtypes:	Specifiers:
	F41.1	Generalized Anxiety Disorder	Without panic attacks	Mild to moderate
Provisional Diagnosis:	ICD-10 Code:	DSM-5 Disorder:	Subtypes:	Specifiers:
	F33.0	Major Depressive Disorder	Anxious distress	Mild

Initial Treatment Goals Informed by Theoretical Orientation (SMART Goal Format):

Goal # 1: Overcome avoidance		
Objectives:	Interventions:	Target Date:
1. Graduate by attending and staying in class	CBT will be used to help Josh identify his automatic thoughts and negative thinking. He will track his mood and behavior and try to implement some changes in his cognition and behaviors.	Two- weeks from his initial appointment.
2. Completing tasks such as picking up prescriptions, writing resume and completing graduation forms.	CBT will be used to help Josh track his thoughts around completing tasks. This will help identify negative automatic thoughts or cognitive distortions.	Two- weeks from his initial appointment.
Goal # 2: Gain more energy and be more productive		
Objectives:	Interventions:	Target Date:

1. Identify and participate in activities he enjoys.	CBT will be used to track mood and behavior.	Two- weeks from his initial appointment.
2. Continue to exercise and eat healthy	CBT will be used to track mood, energy and behavior.	Two- weeks from his initial appointment.

Student Clinician's Name: Lori Santa Maria

Date: 8/16/2025

Dr. Amy Wenzel utilized several counseling skills to help Josh open up and share his experiences and presenting issues. Dr. Wenzel did a great job building rapport with the client early on by sharing the process and modality of cognitive behavioral therapy (CBT). She also showed that she was actively listening by facing Josh, leaning toward him and giving him full eye contact. Her open-ended questions helped them both explore Josh's past and present to see the time and triggers of the presenting problems. Her use of paraphrasing and summarizing helped build trust with Josh as she stated several times that they were a team and collaborating together. Her goal setting was important as she ended the session summarizing and discussing goals and objectives with Josh. They were then able to discuss his motivation to work on things out of session and look ahead for next steps such as listing items and events that he avoids. Overall, Dr. Wenzel did a wonderful job building rapport, educating, identifying key issues and creating a treatment plan that they both agreed on.