

Systemic Case Formulation Tools (Supervision Use)

Genogram/Eco-Map Prompts and Systemic Hypotheses (AAMFT, 2025)

Document Type: Supervision Tool (De-identified; supervision/QA record)

Purpose: To support systemic conceptualization in supervision by mapping relational patterns, contexts, and feedback loops; generating systemic hypotheses; and identifying leverage points for intervention.

Use: Adapt to discipline, setting, and jurisdiction(s); complete with only information relevant to care and obtained ethically.

Tool 1: Genogram Prompts (3 Generations Recommended)

A. Identification and Presenting System

Case ID (de-identified): _____ **Date:** // _____

Presenting system(s): Individual Couple Family Co-parenting Other: _____

Household composition: _____

Presenting concern(s): _____

Who identifies the “problem,” and why now? _____

B. Family Structure Map (Who is in the family system?)

For each key member (3 generations as available):

Name/ID: _____ **Age:** _____ **Role:** _____

Relationship to client: _____

Living status/location: _____

Important identities (as relevant): _____

Significant medical/mental health/substance use history (as known): _____

Trauma/loss events (as relevant): _____

Major transitions (moves, deployments, divorces, estrangements): _____

C. Relationship Process Markers (Patterns Over Time)

Use prompts to annotate lines/symbols in the genogram:

Closeness/distance: Who is close? Who is cut off? Why? _____

Conflict patterns: Typical conflict themes (money, parenting, loyalty): _____

Coalitions/triangles: Who gets pulled in when stress rises? _____

Caretaking/role reversals: Who is parentified? Who over-functions? _____

Boundaries: Enmeshed/rigid/disengaged areas: _____

Communication style: Avoidant/escalating/pursuer-distancer: _____



Attachment patterns (as observed): _____

Intergenerational themes: What repeats across generations? _____

D. Family Rules, Beliefs, and Culture

Explicit/implicit rules: “In our family we...” _____

Beliefs about emotion: acceptable vs. unacceptable feelings: _____

Beliefs about help-seeking/therapy: _____

Cultural/spiritual traditions affecting roles/meaning: _____

Gender/authority norms: _____

E. Genogram Insight Summary (1–3 sentences)

Key relational pattern(s) maintaining the presenting problem: _____

Strengths/protective patterns: _____

Tool 2: Eco-Map Prompts (Context and Systems Map)

A. Current Systems and Supports

Map the client/family at center; add connections with strength/strain indicators.

Informal supports: family, friends, faith community, neighbors: _____

Formal supports: school, primary care, psychiatry, case management, VA, etc.: _____

Workplace: role demands, schedule, stressors, accommodations: _____

Community resources: groups, recreation, mutual aid: _____

Technology/telehealth access: broadband, privacy, device access: _____

B. Stress/Strain and Resource Gaps

Primary stress nodes: (e.g., housing, childcare, legal) _____

Access barriers: transportation, language, finances, stigma: _____

High-conflict institutions or relationships: _____

What would reduce strain most quickly? _____

C. Eco-Map Insight Summary

Most influential external system(s) shaping the clinical picture: _____

Immediate linkage/referral needs: _____

Tool 3: Systemic Hypothesis Builder (Relational Formulation)

A. Define the Problem Systemically (Not Just Intrapsychically)



Describe the problem in interactional terms:

“When ___ happens, ___ responds by ___, which leads ___ to ___, and the cycle continues.”

Who is impacted and how? _____

B. Circular Questions (Use in Session)

Choose 3–5 to ask:

- “When tension rises between you two, who notices first?”
- “What do you do that helps—even a little—when the problem shows up?”
- “Who benefits from things staying the same? Who loses?”
- “If the problem had a job in the family, what would it be protecting?”
- “What would your partner/parent say is your best intention in that moment?”
- “When the cycle is about to start, what is the first sign?”
- “Who gets pulled in as a helper or referee?”
- “What did you learn in your family about conflict, closeness, and needs?”

Record selected questions and responses:

C. Feedback Loop Mapping (Pattern/Cycle)

Identify the core cycle and keep it behaviorally specific.

Trigger: _____

Person A does: _____ (emotion/meaning: _____)

Person B interprets: _____

Person B does: _____ (emotion/meaning: _____)

Result: _____

Reinforcement: How does the cycle “work” (short-term payoff)? _____

D. Hypotheses (Generate 2–3; treat as testable)**1. Hypothesis 1 (interactional function):**

“The symptom/behavior may function to _____ by _____.”

2. Hypothesis 2 (intergenerational link):

“This pattern may echo _____ from earlier relationships, showing up as _____.”



3. **Hypothesis 3 (context/system pressure):**

“External stressors (_____) may amplify the cycle by _____.”

Evidence supporting each: _____

Evidence against / alternative explanation: _____

What data will we gather to test? _____

Tool 4: Leverage Points and Intervention Planning (Systemic)

A. Select Leverage Point(s)

Where can a small change shift the cycle?

- Interrupt the trigger (prevention/structure)
- Change meaning-making (reframe/normalize)
- Change interaction sequence (new response)
- Strengthen boundaries (reduce triangulation)
- Increase direct communication (repair scripts)
- Reduce external stressors (resource linkage)
- Build alliance with each subsystem (couple/parent-child)
- Improve co-regulation skills (time-outs, grounding)
- Other: _____

B. Systemic Interventions (Choose and Specify)

- Reframing / circular questioning
- Enactments (in-session practice)
- Boundary work / detriangulation
- Structural changes (routines, roles)
- Emotionally focused moves (softening, attachment needs)
- Communication coaching / repair scripts
- Behavioral agreements / safety plans
- Family meeting protocol
- Coordination with external systems (school, medical) with consent



Other: _____

Intervention plan for next 1–3 sessions (SMART):

1. _____
2. _____
3. _____

C. Safety and Ethics Overlay (Required)

- **Risk present?** No Yes (describe): _____
- **Mandated reporting concerns?** No Yes (describe actions): _____
- **Confidentiality/ROIs needed?** No Yes: _____
- **Telehealth/system constraints impacting safety?** _____

Tool 5: Supervision Reflection (Clinician Use)

- **Therapist stance:** Neutral/curious Directive Collaborative Other: _____
- **Potential therapist-system fit issues:** _____
- **Countertransference/parallel process:** _____
- **What does the therapist need from supervision to implement the plan?** _____

Quick-Use Mini-Template

Cycle in one sentence: _____

Systemic hypothesis: _____

Leverage point: _____

Next-step intervention: _____

