



CNL-605: Biopsychosocial Assessment Template

Client's Name: Josh

Date: 1/14/2026

DOB: Not provided

Age: 24

Start Time: Not provided

End Time: Not provided

Identifying Information:

Josh is a college student who reached out for counseling to get help with ongoing anxiety that has been affecting his daily life and school. During the initial intake session with Dr. Amy Wenzel, he openly discussed the challenges he has been facing and demonstrated insight into how anxiety has been affecting his daily functioning. Josh appeared motivated to engage in treatment and communicated his concerns clearly, which suggests a readiness to participate in the therapeutic process.

Presenting Problem/Chief Complaint:

Josh shared that anxiety has been making it difficult for him to manage academic responsibilities. He described a pattern of worrying about schoolwork, avoiding tasks out of fear of failure, and feeling overwhelmed as deadlines approached. These experiences have caused him distress and interfered with his ability to participate confidently in his coursework, which led him to seek counseling for support.

Substance Use History:

Josh did not report concerns related to substance use during the intake session. There are no indications that alcohol or other substances are contributing to his current issues.

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

Josh did not share experiences indicating issues with compulsive or addictive behaviors, and these concerns do not seem to be affecting his current well-being.

Medical History/Mental Health History/Hospitalizations:

Josh did not report any significant medical conditions or prior psychiatric hospitalizations. He shared that he spent years in therapy focused on his work, which suggests he has prior experience engaging in counseling and reflecting on his stressors. Despite this, he continues to experience significant anxiety that is now affecting his academic functioning, which led him to seek support again.

Abuse/Trauma History:

Josh did not share experiences related to abuse or trauma during the intake. This area may be explored further as rapport develops, if clinically appropriate.

Social History and Resources:

Josh appears to function independently as a college student, but described limited coping resources when stress increases. Academic expectations are a primary source of strain for him. He did not elaborate on social support, but he demonstrated the ability to reflect on his experience and seek help when needed.

Legal History:

Josh did not report any current or past legal involvement during the intake session. There are no indications that legal concerns are contributing to his present difficulties.

Educational History:

Josh is experiencing anxiety regarding his studies. His worry and avoidance have made it difficult for him to complete assignments and engage fully in his studies, causing increased stress and self-doubt.

Family History:

Josh described a meaningful relationship with his grandmother, who owns the business where he works and is a mentor in his life. He explained that this work creates a complicated dynamic because he has influence in the workplace without a former leadership role, which contributes to feelings of anxiety and uncertainty. Josh shared that his grandmother is often out of town but remains emotionally supportive, noting that she encouraged him to seek professional help when he discussed his anxiety with her. Josh also reported that his mother has had anxiety attacks and postpartum depression, and he mentions the word “bipolar,” which suggests a family history of anxiety and potentially depression. This should be explored further as rapport is built.

Cultural Factors:

Josh did not explicitly describe cultural, spiritual, or religious factors during the intake session. However, his narrative reflects strong values around responsibility, work ethic, and meeting expectations, especially within a family work environment.

Resources, Strengths, and Weaknesses:

Josh's strengths include insight, openness, and a willingness to seek help. He communicates clearly, reflects thoughtfully on his experiences, and has prior experience in therapy. He also has an important supporter in his grandmother, who encourages him to get care. Josh has difficulty with persistent anxiety, physiological tension when sitting in certain settings, and avoidance/procrastination when he feels overwhelmed. His resources include counseling, motivation for change, and the ability to follow structured strategies when supported.

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

From a cognitive behavioral perspective, Josh's anxiety appears to be perpetuated by patterns of worry and fear of negative outcomes, which lead to avoidance and procrastination. Avoidance provides temporary relief but reinforces anxiety over time. Stress related to academic expectations and the complex family work dynamic likely increases his baseline anxiety, making everyday situations feel more overwhelming. Treatment will focus on helping Josh understand these patterns, build skills to manage anxiety, and gradually approach situations he has been avoiding in a supportive and collaborative way.

Clinical Justification:

Josh reports ongoing anxiety that causes distress and interferes with his academic functioning. His symptoms appear persistent rather than situational and include excessive worry, avoidance, and physiological tension. He also shared a family context that includes experiences of anxiety and postpartum depression, which may influence how he understands and responds to his own symptoms. A cognitive behavioral approach is suited to address Josh's needs by providing structure, skill building, and collaborative support aimed at reducing anxiety and improving his daily functioning.

Initial Diagnosis (DSM-5-TR):

Principal Diagnosis:	ICD-10 Code:	DSM-5-TR Disorder:	Subtypes:	Specifiers:
	F41.1	Generalized Anxiety Disorder	None	None
Provisional Diagnosis:	ICD-10 Code:	DSM-5-TR Disorder:	Subtypes:	Specifiers:
	Z56.9	Other problem related to employment	None	None

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

Goal # 1: Reduce anxiety-related avoidance that interferes with academic functioning.		
Objectives:	Interventions:	Target Date:
1. Josh will identify and record at least 3 anxiety-provoking thoughts each week and	CBT-based interventions, psychoeducation, collaborative	

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practice creating balanced alternative thoughts.	cognitive work, gradual exposure to avoided situations, and homework tracking to support skill-building.	8 Weeks
2. Josh will complete one planned academic task for at least 30 minutes for 3 days a week, over 4 consecutive weeks.		
Goal # 2: Improve coping with physiological anxiety and increase confidence in stressful settings.		
Objectives:	Interventions:	Target Date:
1. Josh will practice 2 coping strategies like breathing/grounding and mindfulness at least 4 times per week and track their effect on anxiety using a scale from 0-10.	Skills training for anxiety management, CBT coping plan, graded exposure to feared/avoided situations, and problem-solving strategies.	8 weeks
2. Josh will report an average reduction of 2 points on a 0-10 anxiety scale during academic/work-related stress over 8 weeks, based on self-report and session review.		

Student Clinician's Name: Michelle Trimmell

Date: 1/14/2026