



## OUR PROCESS FOR COMPREHENSIVE EVALUATIONS OF ADULTS AGE 18 AND OLDER

1. Complete **New Client Contact Form** – our office manager, Julie, will call to schedule.
2. Client will receive emails confirming appointment dates, times, and locations.
  - a. **Appointment #1** is an a 1-hour intake with the client to provide more information about your history and current concerns. Dr. Shapiro will also discuss the testing process with you at that time. Unless we have made other arrangements all intake is by telehealth – let us know if you prefer in-person. If parents or other parties want to participate in that appointment, let us know. There may be some time at the end to invite them to join us. We can also send forms to others as a means of collecting their input, too, with your permission.
  - b. **Appointment #2** is scheduled for 4-5 hours of testing (with breaks) in the office, 8:30-1:30. Let us know if you're driving from outside the Des Moines area and we can arrange a later start time.
  - c. **Appointment #3** is a feedback with the client to discuss highlights of the evaluation results and primary recommendations. This is scheduled at the end of testing, provided that all records have been provided by that time. In-person or via telehealth. It can sometimes be helpful to have another adult present for support and to facilitate later discussion.
  - d. A **written report** is provided within 1-2 weeks of the feedback session, uploaded through the client portal.
  - e. Additional, follow-up appointments can be scheduled if/as needed on request.
3. All clients receive an email or text link to register for **Client Portal** for messaging and exchange of forms and records.
4. Links to complete **intake forms** will be sent via Client Portal after the intake is scheduled.
  - a. Please complete these ASAP.
  - b. Especially if you have to wait many months for testing, Dr. Shapiro will often schedule intakes with adults much sooner to discuss any other steps or interventions that may be helpful to pursue while you're waiting for the in-person testing.
  - c. Sign the release for anyone you would like to speak to us directly prior to testing, or to whom we should send any evaluation notes. We can discuss this at the intake if you have questions.
5. You will also receive emails from test publishers' HIPAA-compliant websites (typically Pearson Assessment/Q-Global and PAR*iconnect*) with links for Rating Scales.
6. Where appropriate/applicable, we may ask your permission to have your parents/legal guardians and/or spouse/significant other complete questionnaires or rating scales as well. Please include their name(s) on the Release form if you're comfortable with that. Note that your listing them does *not* mean that we have to tell them details about the evaluation or provide any evaluation results.
7. **Obtain records** as listed below and try to send before the intake interview; let us know if you have trouble obtaining records by then so that your appointment is not canceled/rescheduled. We recommend requesting records at least 30 days prior to testing.
8. If we do not have all records 2 business days before testing, we will cancel the testing appointment and contact you to reschedule unless you have discussed this with us in advance.

### ***Please see the back for a list of records to provide***

*Please try to provide as much of this information as possible before the intake appointment. Let us know ASAP if you are having any trouble getting records or aren't sure how to get started. The more information that is provided, the better we can understand the context of the current difficulties or concerns that are prompting the request for testing.*

## **RECORDS TO COPY AND SEND TO US IN ADVANCE**

- All prior educational records that you can obtain –**
- K-12 records: see what parents or guardians may have saved or passed along to you, and contact your high school or school board to ask what they have kept and how long they save records. Most adults can usually get a copy of at least their high school transcript. Young adults can often access more. Records to try to request include:
  - K-12 report cards, transcripts, and standardized test reports (like Iowa Tests/ITBS, Stanford, CoGAT)
  - Ask for 504 or Special education records, if you received formal support services
  - Email teachers you think might remember you and any difficulties you may have had or supports you received, and ask them to email that Dr. Shapiro
- Post-high school educational records
  - Transcripts (unofficial is OK) from any college or university or technical school attended, even if you withdrew
  - Documentation from campus disabilities services of any accommodations received
  - Email instructors or internship/placement supervisors you think might remember you and any difficulties you may have had or supports you received, and ask them to email me about that
- Testing records – for college or graduate school admissions or professional licensure or certification
  - If you ever took PSAT, ACT, AP, SAT, IB, GRE, MCAT, GMAT, LSAT, step/level tests, professional licensure or certification exams, provide the printout from testing agency's website that includes both the actual scores and the percentile ranks for those scores.
  - Documentation from testing agencies of any accommodations provided (for example, letters from the College Board, ACT, or school) of exactly when, and what, accommodations were provided.
- 1-2 current writing samples if still in school/college/graduate school
- Medical records – Typically all psychiatric, inpatient psych, neurology records, relevant primary care, reports of any brain imaging (CT/MRI), sleep medicine, and related specialist records (such, for example, oncologist treatment summaries)
- Treatment summaries (including dates seen, number of sessions, treatment goals & progress) from psychotherapists such as counselors, social workers, or psychologists
- Informal records that can provide some useful background or contextual information, such as relevant emails to/from school or related service providers, professors, supervisors, colleagues, spouses/significant others, parents, etc.
- All previous evaluation reports whether you agree with the conclusions or not. Healthcare providers and schools keep copies of these for many years, so please ask for them if you do not have copies yourself. Primary care physicians often keep copies in your medical records, so ask them directly for those to provide to you
  - Psychological, Psychoeducational, Neuropsychological, and/or Educational Evaluations or Screenings.
  - Speech/Language, Occupational Therapy (OT), Audiological Evaluations or Screenings.

**How to get these records to Dr. Shapiro:** Any of the following....

- Upload records to the patient portal, <https://BrainHealth.intakeq.com>
- Fax records to 888-598-9466
- Send COPIES to our mailing address. These records will not be returned.

***Preparation of the evaluation report will be delayed if all records & forms are not provided.  
DO let us know if you have any questions or have trouble obtaining this information – we can help!***

**REMINDERS FOR DAY OF TESTING**

- Be sure you a good night's sleep the night before, and let us know if you don't.
- If you take routine medication for attention, ask with Dr. Shapiro whether or not you should take it the day of testing. If unsure, bring it with you.
- If you are prescribed glasses or sometimes use readers for close work, bring them.
- DO let us know if you are not feeling well or have symptoms of a cold or other viral illness. Dr. Shapiro spends up to 3-5 hours sitting in close proximity during testing and also routinely works with clients who are immunocompromised (and thus takes extra precautions). She is able to easily reschedule testing on Fridays, Saturdays, or Sundays within 1-2 weeks, with few exceptions,.
- DO bring a beverage and snacks, and a packed lunch – even if it's early and you're usually "not hungry" or "don't snack."
- Check in with Dr. Shapiro directly during inclement weather. Testing will always be rescheduled in case of weather-related closures or delays in any Des Moines metro area school system or public agency.
- Let us know if you have food allergies or don't like dogs. Sometimes Dr. Shapiro's dog, Herschie, is in the office.