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## OUR PROCESS FOR COMPREHENSIVE EVALUATIONS OF K-12 STUDENTS

1. Call us or complete **New Client Contact Form** – our office manager, Karen, will call to schedule an initial intake appointment and discuss the process
2. Appointments:
  - a. **Appointment #1** is a 1-hour intake for parents, only to discuss current concerns, history, and context. The Psychologist will also discuss the testing process with you at that time. Unless we have made other arrangements all intakes are virtual (telehealth).
  - b. **Appointment #2** is scheduled for 4-6 hours of testing (with breaks) in the office, 8:30 to approximately 2:30. Adults should remain on site for minors. Testing appointments may be delayed if all records are not received.
  - c. **Appointment #3** is a feedback with parents primarily, 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.
  - d. Follow-up with children or teens, or additional sessions with parents, can also be scheduled.
  - e. A **written report** is provided within 2-4 weeks of the feedback session, uploaded through the client portal.
3. All parents/legal guardians will also receive an email or text link to register for **Client Portal** for messaging and exchange of forms and records.
4. Forms to be completed:
  - a. One parent/legal guardian will receive the link to the online Intake Questionnaire that has other forms attached to it (Consent for Services, Testing Addendum, Teacher Contact Form, Insurance information, Fees and Payment).
  - b. If parents/legal guardians are not married (or as otherwise required by law), another Consent for Services form will be sent to the other parent/guardian for their review and signature. We are happy to provide the Intake Questionnaire to both parents upon request.
  - c. Please complete electronic forms ASAP. We will email your child's teachers with links for teacher forms, but we cannot do that until we receive your completed Teacher Contact form.
5. You and your child's teachers will also **receive emails from test publishers' HIPAA-compliant websites** (typically Pearson Assessment/Q-Global and PARiconnect) with links for Rating Scales.
6. We recommend you **email teacher(s)** a *thank you* email about 10 days later to remind them to complete forms promptly. We will need your help monitoring that.
7. **Obtain records** (list on back). Ideally, submit before the intake interview but no later than day of testing. Let us know if you have trouble obtaining records. If we do not have all records 2 business days before testing, we will cancel the testing appointment and contact you to reschedule unless we have discussed this with you 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 K-12 general educational records – ask school counselor or front office to help you collect this:
  - Including teacher comments, interim reports, progress reports, report cards. This should include grades for any courses attempted, and formal and informal teacher comments, emails, conference notes, etc.
  - Transcript (unofficial OK) for any college classes completed during high school
  - All standardized testing reports, including school admissions testing
  - Ask for state testing and nationally standardized test reports (e.g., Iowa Tests/ITBS, Stanford, CoGAT, ERB). Middle school and high school transcripts don't usually have all of this information, so please ask the front office for the score reports from your child's files
  - If your child has taken PSAT, ACT, AP, SAT, and/or IB 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.
  - Documentation of any small-group or special group instruction, or school-based extra help
  - If your child receives extra help with reading, ask what reading curriculum they are using
  - Writing samples – copies of 2-3 examples of recent written work like essays
  
- 504/special educational records, if applicable – ask Case Manager or School Counselor to help you collect this. Front office staff usually do not have access to these records
  - All RTI meeting notes and all assessment data, including initial and triennial re-evaluations and observations.
  - 504/IEP eligibility meeting notes and initial IEP or 504 Plan.
  - Current 504 Plan/IEP, with prior year's end-of-year review, meeting notes, and progress report.
  
- Transcript (unofficial OK) for all college classes attempted.
  
- Medical records – Typically all psychiatric, inpatient psych, neurology records, relevant primary care, reports of any brain imaging (CT/MRI), and related specialist records (such, for example, oncologist treatment summaries). Ask your providers to fax these records to us if you cannot get them from their patient portal.
  
- Treatment summaries (including dates seen, working diagnoses, 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/colleagues, or a screen shot of an online gradebook.
  
- 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. These include all testing or screenings from tutors, psychologists, Speech/Language Pathologists (SLP), Occupational therapist (OT), and Audiological Evaluations or Screenings.

**How to get these records to us:** either of the following...

- Upload records to the patient portal, <https://BrainHealth.intakeq.com>
- Fax records to 888-598-9466

***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 your child gets a good night's sleep the night before and let us know if they don't.
- If your child takes routine medications, discuss with the Psychologist whether or not they should be taken the day of testing. If unsure, bring them with you.
- If your child is prescribed glasses, bring them. We won't be able to test without them.
- DO let us know if person to be tested is not feeling well or has symptoms of cold or other viral illness. We spend up to 3-6 hours sitting in close proximity and we routinely work with clients who are immunocompromised (and thus takes extra precautions). We can usually reschedule local testing within a few weeks, with few exceptions.
- An adult must plan to remain in our waiting room UNLESS exceptions were confirmed in writing. Your child will return to the waiting room to sit with you during breaks, or to get some fresh air outside.
- DO bring a beverage and snacks, and a packed lunch – even if it's early or your child "doesn't eat."
- Have your child dress in layers so that they are comfortable regardless of the temperatures inside or outside.
- Let us know in advance if someone other than a parent/or legal guardian will be staying.
- Check in with us directly during inclement weather. Testing will always be rescheduled in case of weather-related closures or delays in any metro area school system or public agency.

## WHAT TO SAY TO A CHILD OR TEEN

- If your child has some awareness of their areas of difficulty, or the reasons for which you're seeking testing simply say that the psychologist is an expert with that sort of thing and will help them, their parents and teachers figure out *why* and *what to do about it*.
- You can tell them that the psychologist is a doctor, but not the kind who pokes or gives shots. Rather, they're a brain doctor and an expert on how kids think, learn, behave. They'll ask lots of questions, your child will do some work, and we'll have advice for them and their parents and/or teachers. We'll explain more when you're here.
- With young children, sometimes the Psychologist explains by telling them that just like they go to their pediatrician for check-ups, they're a kind of doctor that does school check-ups to help get them ready for \_\_\_ grade.
- We recommend you avoid saying they'll be playing games – unfortunately, there are no games – or that it's "testing," because several hours of testing sounds miserable to most people. The Psychologist usually starts the conversation by asking why they think they're here and goes from there.

Regardless of how it's described, we try to make it fun, with lots of breaks and positive reinforcement for good efforts. Adolescents are often pleasantly surprised that it wasn't as bad as they expected. Do let us know if your young child has a favorite animal or popular character that could be helpful to incorporate with stickers, cards, etc.