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

**GETTING STARTED – Contact us!** Call, email, or complete the New Client Contact Form on our website. Dr. Shapiro or our office manager, Karen, will call to schedule an initial intake appointment and discuss the process. We are happy to coordinate scheduling with parents of high-school and college students.

**PORTAL LOG-IN –** Clients receive an email or text link to register for the **Client Portal** for messaging and exchange of forms and records. You can upload PDFs of all documents and records there. If a partner or parent will be helping you obtain records, we can create a separate and linked account for them too – just let us know.

### APPOINTMENTS -

➤ **Intake:** a 1-hour intake to discuss the testing process and the current concerns, history, and context. If the person to be tested is still in high school, this intake is with parents only. If college-aged or older, we can schedule an additional parent intake or a longer appointment for a parent or partner to join us on request. In-person preferred for local clients, but telehealth is possible.

During that appointment Dr. Shapiro discusses your history and your current concerns, and her recommendations for how best to proceed. When the referral concerns are related solely to ADHD or Autism, traditional comprehensive testing batteries and detailed reports are not always needed.

- **Testing:** typically scheduled on a separate day, up to 4-6 hours with breaks. *If you have not had an updated vision screening within the last year, please schedule that before testing.*
- **Additional clinical interviews:** evaluations for ADHD and Autism typically involve structured clinical interviews separate from the intake or in-person testing, and ideally with a parent or other extended family who can speak to childhood history.
- **Feedback:** 1-1.5 hour follow-up session to discuss highlights of the evaluation results and primary recommendations, typically within 1-2 weeks after testing. In-person preferred, with telehealth possible.

**WRAP-UP: A written report** is provided within 2-4 weeks of the feedback session, uploaded through the client portal. Additional follow-up and services also available upon request. Additional sessions, and feedback with spouse/partner, parents, can also be scheduled by request.

### NITTY-GRITTY -

#### **Required Forms:**

- ✓ You must complete the Intake Forms before the first appointment. Allow plenty of time to check with others if needed to be able to provide accurate information vs. guessing or leaving questions blank.
- ✓ If someone else will be paying for the evaluation services, we recommend that they review the consent forms with you.
- ✓ You will also receive emails from test publishers' HIPAA-compliant websites (typically Pearson Assessment/Q-Global and PARiconnect) with links for Rating Scales.
- ✓ We often ask others to complete questionnaires or rating scales too. Please include their name(s) on the Release form if you're comfortable with that – but know that your listing them does not mean that we have to share any evaluation details or results with them.

**Records!** We ask for everything and rely on you to send it to us or to have it sent to us – see next page for complete list. Ideally, submit before the intake interview but no later than day of testing.

**Let us know ASAP if you have trouble obtaining records or are not sure how to get started. 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*

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

***Even if you think the records aren't going to be useful or informative, we review them anyway. Sometimes what they don't say can be just as useful as what they do say, but we also look at patterns over time.***

### **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

### **Additional records --**

- Work-related information** – if you are struggling in the workplace or suspect a need for workplace accommodations or supports, provide us with your written performance review documents, job description, and any performance improvement plans and related correspondence
- 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. Ask them to send it to us directly by email or fax.
- 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 us:** Any of the following....

- Upload records to the patient portal, <https://BrainHealth.intakeq.com>
- Fax records to 888-598-9466.
- Email to [office@brainhealthpllc.com](mailto:office@brainhealthpllc.com) if uploading or faxing isn't an option.

***Your appointments may be canceled 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 get a good night's sleep the night before and let us know if you don't.
- If you take routine medication for attention, ask the Psychologist whether or not you should take it the day of testing. If unsure, bring it with you. If you forget routine medication that we are expecting you to have taken, you may need to reschedule.
- If you are prescribed glasses or sometimes use readers for close work, bring them. We will not test without them.
- DO let us know if you are not feeling well or have symptoms of a cold or other viral illness. We spend up to 4-6 hours sitting in close proximity during testing and also routinely work with clients who are immunocompromised (and thus takes extra precautions). We can usually reschedule testing within a few 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 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.
- Dress in layers so that you are comfortable regardless of the temperatures inside or outside.
- Although this kind of testing is not typically as stressful as traditional school testing, it can be surprisingly exhausting to test-takers, so we encourage you to plan accordingly.