
OUR PROCESS FOR COMPREHENSIVE EVALUATIONS OF K-12 STUDENTS

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

PORTAL LOG-IN - All parents/legal guardians will also 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.

APPOINTMENTS -

- **Intake:** 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. In-person preferred. Participation of all parents/guardians (only) with custody is required but let us know in advance if you have any concerns about this. We are happy to schedule additional time if you want it – we want you to feel heard.
- **School observation:** if scheduled, this is typically conducted after the intake but before testing.
- **Testing:** typically scheduled over 2 days, breaks included (although we can schedule one longer day/session for students traveling from out-of-town). Day 1 is typically 9:00 a.m. to 12:00/1:00 p.m., with another 3-4 hour session, typically starting around lunchtime on a separate day. An adult must remain on site for minors. Testing appointments may be delayed if all records are not received. In some cases, a 3rd day may be added.
- **Feedback:** 1-1.5 hour follow-up session with parents, only, with another session (typically 15-30 minutes) with the child to review highlights of the evaluation and primary recommendations, including referrals to related providers as needed. This is scheduled at the end of testing. In-person strongly preferred.

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.

NIITY-GRITTY -

Required Forms:

- ✓ One parent must complete the Intake Forms sent electronically prior to intake. 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.
- ✓ 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 Intake Forms.
- ✓ Parents and others will also receive emails from test publishers' HIPAA-compliant websites (typically Pearson Assessment/Q-Global and PARiconnect) with links for Rating Scales.
- ✓ We recommend that you **email teacher(s)** a *thank you* email about 5 days later to remind them to complete forms promptly. We will need your help monitoring that.

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 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 try to provide as much of this information as possible before the intake appointment if you can. 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 – THERE’S A LOT, SO PLEASE REVIEW CAREFULLY

- 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, with percentile ranks
 - 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, MTSS supports, or other 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.
 - Other: discipline records, office “referrals,” bullying records or reports, home notes specific to your child.
 - 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 MTSS 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.
- Medical records – Typically all psychiatric, inpatient psych, neurology records, relevant primary care (visits when concerns or problems were discussed or treated) reports of any brain imaging (CT/MRI), and related specialist records (such, for example, oncologist treatment summaries). We don’t need labs (unless we’ve specifically requested them) or notes for when your child was sick. If there were any complications during or after birth, or NICU stays, provide those records too. Ask your providers to fax these records to us if you cannot get them from their patient portal, but we’ll rely on you to be sure we’ve received all that we need or should have. We always appreciate a “big picture” timeline or summary from parents to give us some context and overview for individuals with complex histories.
- Treatment summaries including dates seen, working diagnoses, number of sessions, treatment goals & progress, from any service or treatment provider – therapists, counselors, psychologists, psychiatrists, OT’s, SLP’s, PT’s etc.
- 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 (PDF’s or documents preferred vs jpgs of pages) to Client Portal, <https://BrainHealth.intakeeq.com>
- Fax records to 888-598-9466 or send to office@brainhealthpllc.com and message us in the portal to expect them.
- We can also create a temporary Google folder for you to upload your child’s records to us.
- If school personnel assure you that they’ll send them to us directly, please follow-up to be sure it happens.

Scheduling testing & feedback and preparing the evaluation report will be delayed if we’re waiting for records.

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 and will reschedule.
- DO let us know if person to be tested is congested, not feeling well in general, or has symptoms of cold or other viral illness. We spend 3-4 hours sitting in close proximity and we routinely work with clients who are immunocompromised – thus we take extra precautions. Congestion for any reason can also impact language test performance. 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're comfortable regardless of inside or outside temperatures.
- 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.
- Having their favorite snack or candy on hand is a great reward for their good efforts, and especially if you're concerned about your child's motivation or compliance. We don't judge, and it's also just a nice treat for all kids and teens too!

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, and 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. Teens 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, candy, or popular character that could be helpful to incorporate with stickers, cards, extra treats, etc.

If you're nervous, your child will be too, so please talk with us if you have any concerns or need guidance in that regard.