

CHECKLIST OF FORMS AND RECORDS FOR COMPREHENSIVE EVALUATIONS

This checklist summarizes the list of forms that I have asked you to complete, and records that I have asked you to copy and bring with you to the initial intake appointment. The more information that is provided to me, the better I can understand the context of the current difficulties or concerns that are prompting the request for testing.

My forms (from the General Clinical Services page of my website) and rating scales (links provided by email):

- Intake Questionnaire: Child/Adolescent Form for students K-12, Adult Form for College/Graduate Students:
- Clinical Services Agreement, indicating you have also read *Additional Information for Comprehensive Evaluations*
- Release of Information, if not already provided
- Online behavior questionnaires using links emailed to you from test publishers' websites (typically 2 per parent)

Records to copy and bring with you:

- All K-12 general educational records, including teacher comments, interim reports, progress reports, report cards. This should include grades/comments for all terms, and not just end-of-year grades.
- Documentation from the school of any formal or informal accommodations provided.
 - If you/your child have/has been receiving accommodations for many years, include documentation that confirms this, such as a letter or email from school personnel to me, or copies of initial and current plans
- Transcript (unofficial OK) for all college classes attempted.
- All standardized testing reports, including school admissions testing such as JATP and SSAT.
 - For students enrolled in public schools, you may need to ask the school counselor, teacher, or front office for all curriculum-based testing records that may have been administered to help determine instructional goals/placement. Also ask for state testing (e.g., CRCT, Milestones tests, End-of-course tests) and nationally standardized test reports (e.g., Iowa, Stanford, CoGAT, ERB).
 - If your child has taken PSAT, ACT, AP, SAT, and/or IB tests, provide the printout from testing agency's website that includes both the actual scores and the percentile ranks for those scores. Screenshots are fine if they are legible and the source of the information is also visible, along with percentiles.
- Documentation from testing agencies of any accommodations provided (for example, letters from the College Board, ACT, SSAT, or other testing agency). Please provide copies of each letter received so that I can be sure of exactly when, and what, accommodations were or were not provided.
- Relevant medical records.
- Informal records that can provide some useful background or contextual information, such as relevant emails to/from school or related service providers, or a screen shot of an online gradebook.
- Work samples – writing samples particularly helpful to include.
- All previous evaluation reports whether you agree with the conclusions or not. Healthcare providers and schools will keep copies of these longer than you may think, so please ask for them if you do not have copies yourself.
 - Psychological, Psychoeducational, Neuropsychological, and/or Educational Evaluations or Screenings.
 - Speech/Language Evaluations or Screenings.
 - Occupational Therapy (OT) Evaluations or Screenings.
 - Audiological Evaluations.
- Public School Special Education records.
 - All RTI meeting notes and all assessment data, including initial evaluations and triennial re-evaluations.
 - 504/IEP eligibility meeting notes and initial IEP or 504 Plan.
 - Current 504 Plan/IEP.
 - Each year's end-of-year review and meeting notes, with documentation of progress towards goals.
 - Any additional meeting notes to revise or update plans, include re-evaluation documentation.
 - All assessment and observation records, including documentation of triennial re-evaluation.

Please note that preparation of the evaluation report will be delayed if all records & forms are not provided by the initial meeting. Thank you!