

# Forensic Evaluation Appointment Preparation Checklist

Advanced Cognitive Health

## Preparing for Your Forensic Evaluation

Forensic and court-related behavioral health evaluations are conducted to address specific referral or legal questions. Preparing ahead of time can help the evaluation proceed efficiently and ensure that relevant information is available for consideration.

Use this checklist as a general guide. Your evaluator may provide additional instructions based on the type of evaluation and referral question.

### BEFORE YOUR APPOINTMENT

#### ☐ Complete Requested Forms

Complete any intake, consent/notification, authorization, or preparation forms provided to you. Answer questions as accurately and completely as possible.

#### ☐ Review Your Appointment Instructions

Confirm the date, time, location or telehealth instructions, expected appointment length, and any identification or documentation you have been asked to provide.

#### ☐ Gather Requested Records

Only provide records requested or relevant to your evaluation. Depending on the case, these may include:

- ☐ Previous behavioral health or psychological evaluation reports
- ☐ Mental health treatment records
- ☐ Medical records
- ☐ Substance use evaluation or treatment records
- ☐ Current medication list
- ☐ Court orders or other legal documents
- ☐ Immigration-related documents
- ☐ Probation/community-supervision documentation
- ☐ Employment records, when relevant
- ☐ Educational records, when relevant
- ☐ Other records specifically requested by the evaluator

#### ☐ Prepare Referral & Case Information

If applicable, have the following information available:

- Name and contact information for your attorney or referral source
- Case number

- Court or jurisdiction
- Upcoming court dates or deadlines
- Type of evaluation requested

☐ Prepare a Current Medication List

Include medication names, dosages if known, prescribing providers, and the reason each medication is prescribed when known.

☐ Be Prepared to Discuss Relevant History

Depending on the evaluation, you may be asked about:

- Mental health history
- Medical history
- Trauma and significant life experiences
- Substance use history
- Previous treatment
- Family and relationship history
- Educational and employment history
- Current symptoms and functioning
- Relevant legal or case circumstances

☐ Identify Potential Collateral Sources

In some cases, the evaluator may determine that information from another person or professional would be helpful. Be prepared to provide names and contact information if requested. Do not ask others to contact the evaluator unless instructed to do so.

## THE DAY OF YOUR EVALUATION

☐ Arrive or Log In on Time

Allow sufficient time for the appointment. Some evaluations may require extended interviews or more than one appointment.

☐ Bring Requested Identification & Documents

Have any requested identification, records, forms, or documentation available.

☐ Participate Honestly & Completely

Answer questions as accurately as you can. If you do not remember something or do not know an answer, say so rather than guessing.

☐ Ask Process Questions When Needed

You may ask questions about the evaluation procedures, the evaluator's role, limits of confidentiality, or what will happen after the evaluation.

## AFTER YOUR EVALUATION

☐ Respond to Requests for Additional Information

The evaluator may request additional records, documentation, assessment sessions, or authorized collateral information before completing the evaluation.

☐ Direct Report or Case Questions Appropriately

For forensic matters, reports are generally released according to the terms of the referral, applicable authorizations, professional requirements, and legal requirements. Ask the evaluator who will receive the report if you are unsure.

## IMPORTANT REMINDERS

- A forensic evaluation is different from psychotherapy.
- The evaluator's role is to provide an independent professional assessment rather than advocate for a particular legal outcome.
- No specific diagnosis, recommendation, opinion, or case result can be guaranteed.
- Evaluation procedures vary according to the referral question and individual circumstances.
- Additional records or collateral information may be requested when appropriate.

## Questions Before Your Appointment?

Contact Advanced Cognitive Health using the contact information provided with your appointment materials.

Advanced Cognitive Health

Forensic & Court-Related Behavioral Health Evaluations