

Office Visit Protocol (4/12/25)

The purpose of this protocol is to guide you through the office visit smoothly. This protocol provides you with a checklist from meeting to exiting the client, materials needed for the office visit, and detailed procedures to follow. This protocol is extensive, but complete. It may be clunky at first, but after a few clients it will go smoothly. You should reserve three hours for each client. I conduct 3 evaluations in one day (9 am, 12 pm, and 3 pm). At first it will take you this long, but it gets faster.

Check List and Order of Procedures

1. Meet and greet and collect co-pay.
2. Introduction and summarize the evaluation process.
3. Obtain Evaluation and Electronic Transmission Consents.
4. Pursue the homework.
5. Identifying Information interview.
6. Presenting Circumstances interview.
7. Developmental History/Differential Conditions questionnaire and review results.
8. Administer CNS Vital Signs battery and share results.
9. Administer any supplemental psychological tests.
10. Score Barkley Rating Scales.
11. Complete DSM-5-TR (ADHD Diagnostic Criteria (A-E) form.
12. Complete the DSM-5-TR Diagnostic Criteria/Diagnosis/Recommendations tables.
13. Review the findings (feedback) with the client.
14. Conduct an exit.

This is where the “rubber meets the road!”