Psy 664a - Ability Assessment  
Guidelines for Writing Reports  

I. General format for the report: There are many styles of writing reports and you will have to adapt your style according to your supervisor. There are several examples of reports in the Sattler book and the Psychology Clinic manual (pp 31-37). The following format, however, is to be used in this course.  

Psychological Evaluation  

Name:                                                                                      Sex:  
Date of Birth:                                                                          Examiner:  
Age:                                                                                         Date Examined:  
Education/Grade: (adult/child)  

Identifying Information:  

Presenting Problem:  

Background Information:  

Previous Psychological Contacts:  

Tests (or Techniques) Administered:  

Behavioral Observations:  

Test Results (or Evaluation Results or Results of Evaluation):  

Summary and Recommendations:  

II. General Guidelines for Reports  

Use last names with adults (e.g., Ms. Green, Mr. Smith), first names for children, and the full name at the top and in the identifying information section.  

Remember, the point of the report is to convey your findings and understanding of the case in as clear and concise a manner as possible.  

Both versions of reports are to be typed, double-spaced, and proofed (free of typos, misspellings, etc.) before being handed in.  

Hand in the first version with my comments when you turn in a revised report.  

Always include your scored test protocol and any other materials (e.g., notes from the interview, behavioral observation notes) with your reports.  

Be sure to put information in the correct part of the report. Although this may seem obvious, in actuality, it sometimes takes some practice to learn where things go.
III. Description of parts of report. (Note: letters and numbers are for the purpose of this outline and should not be used in the reports.)

A. Identifying Information: Full name (later in the report, use first names with children and last names with adults), age, race, marital status, other identifying features (e.g., appearance, significant history), may include children, occupation, significant medical problems or history, place of residence.

Examples of Identifying Information section of report:
1) Edward Smith is a 38 year old white single male who is tall, thin and has long blond hair. He currently lives in Terre Haute, IN with two roommates and works as a clerk in a department store.

2) Tommy Jones is an 8 year old white male who lives with his parents and his older sister in Brazil, IN. He is currently in the second grade and in the special education program due to a reported history of learning disability.

B. Referral: Referral source and reason for referral. Why the person was referred for evaluation - this is important in selection of tests to be used and in making the recommendations. In this course, the source of referral is usually "self-referred" and reason for referral is usually "volunteered to help graduate student fulfill assessment course requirement". However, there will be a reason for referral for the WISC-III report for which I will be providing the data or if you test a client from your supervision team -- see me and your supervisor about this possibility before you test the client.

Examples of Referral section of the report:
1) Jane was referred by her teacher for evaluation of intelligence, particularly verbal abilities, because she has been having difficulty keeping up with her class in reading assignments.

2) Mrs. Black was referred by her therapist at the Psychology Clinic for an assessment of intelligence in order to help with treatment planning.

3) Bob volunteered for testing to receive extra credit in his psychology course and to help the examiner fulfill a requirement for an assessment course.

C. Presenting Problem: Nature and history of the presenting problem(s) including current specific symptomatology, duration, onset, precipitating factors, etc. May need more than one paragraph if there is more than one problem. In this class, there will usually not be a presenting problem and you can omit this section or briefly state there is no presenting problem. For the data provided report (or any Clinic clients you may test) there will be a presenting problem.

Examples of Presenting Problem section of the report:
1) Since starting the ninth grade at a new school this year, Jim's grades have dropped significantly, from "As" and "Bs" to "Cs" and "Ds". He has always been an outstanding student and his parents became concerned when he brought home his grade report this term. His teacher noted that he appears withdrawn and isolated from his peers and is concerned that he is not adjusting well to the new school. His parents also noticed that he has been appeared to be depressed since they moved. While he had many friends and participated in sports and other extracurricular activities at his prior school, he has not made any friends in Terre Haute and has not joined any clubs or teams.

2) Mr. Smith was diagnosed as mildly mentally retarded at the age of 5 and had been in special education classes throughout school. He completed the 10th grade at age 19 and has since attended a structured workshop and day treatment program. He lives with his parents, who provide for his basic needs, and he receives social security disability.
D. Background Information: Describe relevant background information including the family and social situation, educational and occupational history, relationship history, medical history. Organize paragraphs chronologically or according to topic. This part of the report puts the test data into a context and helps the reader get a sense of the individual. Do NOT include behavioral observations here. For children, developmental history and medical history can often be combined. Sattler provides a list of normal childhood developmental milestones (Table C-60, pp 883-4) to help you know what is normative.

Sample outline of paragraphs for Background Information:
1. Birth and family of origin: where born and raised, number of sibs, info about parents (ed, occupation, divorces, deaths, etc), past and current relationships with family members
2. Educational history (past to most recent)
3. Occupational history (may combine with educational history paragraph)
4. Relationship history and marital (may put this before educational history if you prefer)
5. Medical history (including substance use, current medications)

In practice, you can vary the order of the paragraphs somewhat depending on the problem; however, there must be one consistent theme for each paragraph and it should be readily apparent to the reader what the theme is (e.g., medical history). Within paragraphs, chronological order is probably best. Be sure to note who provided the information (according to Mr. Brown; Jane reported). In terms of tense, it is usually better to put the verbs concerning the interview and test session in the past tense (Jane reported...) and the current background information in the present (...)that she lives with her parents): i.e., “Jane reported that she lives with her parents.”

Example of Background section of the report: (this is briefer than you would use in a report)
1) Jim is the oldest of 3 children in his family including a brother who is 2 years old and a sister who is 10 months old. His mother is a draftsman and his father is a salesman. Both parents have college degrees. The family moved from Springfield, IL to Terre Haute about two months ago because his father was transferred to another branch of his company. According to his parents, Jim has a good relationship with both of them and with his two younger siblings.

Jim is currently in the first grade and has reportedly been doing well in school academically and socially. His parents noted that his teacher told them that he is well behaved and cooperative. After school, he participates in Cub Scouts and does his homework. His hobbies include playing baseball and collecting baseball cards and he reportedly has many friends in his neighborhood.

Jim was a premature, low birth weight infant who may have suffered anoxia at birth. However, his mother reported that he has had no medical problems since birth and has been healthy, except for usual childhood illnesses (e.g., measles). His mother also reported that he reached developmental milestones at the usual ages (e.g., started walking at 11 mos., used brief sentences at 2 years). Jim also appears to have normal social development and plays well with peers both at home and in school.

E. Previous Psychological Contacts:
Be sure to comment on past psychological/psychiatric treatment. ("No history of psychological problems or previous treatment" is an important piece of information that should be explicitly stated).

Example of Previous Psychological Contacts section of report:
1) Mr. Black has never sought psychological services previously.

2) Jim was tested by a psychologist in Terre Haute (Tom Jones) approximately 2 years ago (10/95) because his mother was concerned that he may have suffered brain damage from the anoxia. Results of psychomotor tests and a developmental screening test were within normal limits at that time. Because Jim was showing some regression and immature behaviors which were felt to be related to the birth of his sister, he was seen for four sessions of play therapy to help him deal with issues surrounding his sister's birth.
F. Tests Administered: List the tests used including clinical interview with individual, parent or teacher. Write out the full name of the test(s) and put the abbreviation in parentheses.

Example of Tests Administered section of report:
- Clinical interview with Jim Smith and his mother
- Wechsler Intelligence Scale for Children - Third Edition (WISC-III)
- Bender-Gestalt Visuomotor Test

G. Behavioral Observations: Start with general observations: appearance, attire, mannerisms, speech, mood, any abnormalities in behavior. Afterwards, describe test-related behaviors including level of cooperation, motivation, speed, attention, etc. as well as specific test behaviors such as the strategies used to perform a task. Observations probably should be divided into two paragraphs: general observations (e.g., appearance, activity level) and specific test-related behaviors (e.g., hesitated to guess, response to success). Avoid using first person ("the examiner" is preferred). This is a good place to include specific quotes and other examples that reveal the individuality of the person being tested.

Example of Behavioral Observations section of the report:
1) Bob is a thin, frail looking boy who looked younger than his age and was casually dressed in a sweater and jeans. Initially, he appeared somewhat shy and withdrawn, but he became increasingly verbal and friendly as the test session progressed. Bob’s speech was immature for his age; he had difficulty pronouncing some consonant blends and at times used "baby" words such as "doggie." Motorically, he also appeared immature and awkward for his age.

Bob was very cooperative and motivated to perform well throughout the testing and he seemed to work hard to please the examiner. While he worked rapidly to complete tasks, he was also careful to check his responses. However, his speed, coupled with his difficulty with fine motor control, resulted in him dropping several of the test stimuli during nonverbal tasks, therefore exceeding time limits.

H. Evaluation (or Test) Results: Briefly present test results and your conceptualization. This is one of the most important parts of the report - you want to convey the results in a CLEAR and meaningful way to the reader. Present the salient findings and what they mean, not all possible interpretations of the data. For the purposes of this course, use 3 paragraphs to present this information.

1. First paragraph: present the IQ results (FSIQ, VIQ and PIQ) and the levels of performance (i.e., defective, borderline, low/below average, average, high/above average, superior, very superior). Comment on significant differences between verbal and nonverbal abilities. Include a statement about whether or not the test results appear to be valid (and if not, why not, and are the results an overestimate or underestimate). Use the term "nonverbal" rather than "performance" tests - it more accurately describes the abilities since all tasks (verbal and nonverbal) require "performance".

Examples of first paragraph in Test Results part of report:
1) Ms. A performed in the average range of intelligence (VIQ=100, PIQ=105, FSIQ=102) without significant difference between verbal and nonverbal abilities. These test results appear to be valid indicators of her current level of intelligence."

2) The results of this evaluation appear to be valid and show that overall, Mr. T is functioning in the high average range of intelligence (FSIQ=115). His nonverbal abilities, however, are significantly stronger than his verbal abilities, which are in the superior and average ranges for his age, respectively (VIQ=102, PIQ=126)."

3) Overall, Tom performed at the borderline level of intelligence for his age (FSIQ=78) with low average verbal abilities and nonverbal abilities at the mentally defective level (VIQ=88, PIQ=68). However, results should be viewed with caution because low energy and fatigue from a recent
bout with pneumonia may have resulted in poorer performance on nonverbal tasks that are highly dependent on speed. Thus, results may underestimate his actual level of intellectual functioning, particularly for nonverbal abilities.

Optional: a) You may want to put in confidence intervals

Example of using confidence intervals in first paragraph:

1) Overall, Tom performed in the average range of intelligence for his age (FSIQ = 99). **Chances are 95 out of 100 that his true IQ falls in the range of 93 to 105.** While his verbal performance was generally in the high average range, his nonverbal performance was significantly lower and in the low average range for his age (VIQ=112, PIQ=88). Results should be viewed with caution, however, since his depression and associated psychomotor retardation may have decreased his scores, especially for nonverbal tasks which are heavily dependent upon speed of performance. (Note: in this example, the validity of the test results is questioned.)

Optional: b) You may also want to start the results section with a table listing all of the subtest scaled scores and the total IQs. However, keep in mind that the actual scores may have little meaning to the reader. The listing of scores is then followed by the first paragraph of results.

Example of listing test scores before the first paragraph:

**WAIS-R Results:**

<table>
<thead>
<tr>
<th>Verbal Subtests</th>
<th>Score</th>
<th>Nonverbal Subtests</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>10</td>
<td>Picture Completion</td>
<td>10</td>
</tr>
<tr>
<td>Digit Span</td>
<td>9</td>
<td>Picture Arrangement</td>
<td>11</td>
</tr>
<tr>
<td>Vocabulary</td>
<td>12</td>
<td>Block Design</td>
<td>8</td>
</tr>
<tr>
<td>Arithmetic</td>
<td>8</td>
<td>Object Assembly</td>
<td>10</td>
</tr>
<tr>
<td>Comprehension</td>
<td>11</td>
<td>Digit Symbol</td>
<td>9</td>
</tr>
<tr>
<td>Similarities</td>
<td>9</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Second paragraph: The second paragraph should list strengths and weaknesses (not all the areas tested). Start with strengths, then go to weaknesses. Strengths and weaknesses can be "absolute" (high or low scores based on a criterion) or "relative" (strong or weak relative to other aspects of that individual's performance -- other subtests or groups of subtests). Describe the abilities (e.g., attention to visual detail) rather than naming the subtest (e.g., Picture Completion). Describe the level according to Sattler's descriptors (e.g., deficient, borderline, low/below average, average, high/above average, superior, very superior). Using terms such as "good" or "fair" is meaningless. Other areas may also be described, but in more general terms.

Example of second paragraph in Test Results part of report:

1) Tom's strongest areas were common sense and understanding of social situations, which were at the **above average** level. His weakest area, which was at the **borderline** level for his age, was **verbal abstract thinking**. All other verbal and nonverbal areas tested were at the **average** level.

2) Mr. T performed at the **average or above average level on all tasks** with no areas of strength or weakness noted. However, his **fund of information**, at the **top of the average level** for his age, is **significantly stronger than his verbal abstract thinking**, which is at the **bottom of the average** level. In addition, while still in the **average range**, his perception of essential visual details is **relatively weak** compared to his other nonverbal abilities.

3) John demonstrated strengths in all verbal tasks that are dependent on academic preparation with **very superior knowledge of word meanings** and **verbal abstract thinking** and **superior numerical reasoning**. While he did not demonstrate any areas of weakness, his performance on a task requiring **visual analysis and synthesis and nonverbal abstract reasoning** was at the **average level** and was **significantly weaker than his verbal abstract thinking** (or you could say “which suggests that his **verbal reasoning skills are significantly stronger than his nonverbal**
reasoning abilities”.

**Optional:** You may wish to add in comments on performance in terms of factors. While you calculate the factor scores, you do not report them in the report. Instead, talk about the level (e.g., average) of the factors and if they are significantly stronger/weaker than each other.

**Example of factor scores in second paragraph of Test Results:**
1) In general, Paul's verbal comprehension was average while his perceptual organization skills were superior. His strongest performance, which was at the very superior level, was on a task requiring attention to visual detail, while his weakest performance, at the low average level, was on a task requiring numerical reasoning.

You can also talk about intratest scatter (variability within subtests) and intertest scatter (comparisons between subtests).

**Examples of scatter analysis:**
1) Jim exhibited considerable intrasubtest scatter which appears to be related to his fluctuating levels of attention throughout the test session.

2) While Bob demonstrated superior performance on a task requiring common sense and understanding of social situations, he performed significantly lower, at the below average level for his age, on a task requiring perception and sequencing of socially relevant visual stimuli. This pattern of results, coupled with below average performance on perceptual organization tasks, suggests a relative weakness in visual perception and organization but strong common sense and social understanding.

3. **Third paragraph:** Finally, there should be a paragraph (or two) conceptualizing the case; i.e., integrating test scores with behavioral observations and background. This is the place to pull everything together - do NOT wait until the summary. If there is a referral question, it should be answered in this part of the report (e.g., “Results are consistent with mild developmental delay rather than mild mental retardation”) and again in the recommendations.

**I. Summary and Recommendations**

**Example of third (integration) paragraph:**

1) Results of the evaluation are consistent with a pattern of delayed maturation. Bill was born prematurely and has shown delays in reaching developmental milestones since infancy. Test results suggest that he is particularly delayed in verbal abilities despite his mother's attempts to work with him on reading and vocabulary. In addition, Bill's high level of energy and short attention span contribute to his difficulties in successfully completing verbal tasks.

**I. Summary and Recommendations** Start with a brief summary of about 4-7 sentences (this is especially necessary on long reports) followed by your recommendations. The summary should contain all of the significant information about the referral, background, behavioral observations, test results and conclusions. One way to organize the summary is to include: a) one or two sentences about the demographics, reason for referral and background, b) one (or two if significant) sentences about behavioral observations, c) one or two sentences about test results – emphasize the major points, and d) one or two sentences on your conceptualization. If there is a referral question, be sure to answer it again in the summary. Generally, describe overall test results and strengths or weaknesses – do NOT include test scores in the summary (this varies, in some cases IQs can be included but never include subtest scores). Do NOT introduce any new information or conclusions in the summary. It is meant to be a synopsis of the information in the body of the report, not a section to draw additional conclusions.

**Example of summary:**
1) Debbie is a 13 year old girl evaluated for placement in classes for the gifted. Debbie is currently in the seventh grade and receives excellent grades in all of her courses. Test results suggest that she is functioning intellectually at the superior level with verbal abilities at the very superior level. In addition, Debbie appears to enjoy school and likes to be challenged by academics; however, she is somewhat shy and has few interests outside the classroom.

2. **Recommendation paragraph:** Recommendations are often in response to the referral question or may be suggested as remediation. In this class, there usually is no referral question, but suggestions for improved performance may be made. Remedial education recommendations can be found in Sattler (Table C-42, pp 856-8). If the results suggest that the person is functioning well and there are no recommendations, be sure to state this in the report (Do NOT just omit mention of recommendations). Try to be as specific as possible. For example, if you recommend additional assessment be sure to specify the type of assessment (e.g., evaluation for depression; further evaluation for a learning disability using an achievement and a visuomotor test). It is acceptable to make recommendations beyond the domain of intelligence testing, such as referral to a physician to rule out medical problems, referral for personality testing, or referral for family therapy. Finally, be sure to start a new paragraph for recommendations to make it clearly stand out from the summary.

**Example of recommendation paragraph:**

1) Based on this evaluation, it is suggested that Debbie be placed in the gifted class. In addition, it is recommended that she also be encouraged to interact more with others and become involved in other activities. One way this may be accomplished is by getting her involved in an academic club such as the science club.

2) Based on the results of this evaluation, Mr. Jones is functioning at the average level and there are no recommendations.