

Forensic Evaluation Report Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A forensic psychological evaluation report answers a legal question posed by a court or retaining attorney: competency to stand trial, criminal responsibility, parenting capacity, civil damages. The person examined is an evaluatee, not a patient: no treatment relationship, confidentiality limited and explained up front. Structure is convention (Grisso's model, the 2013 APA and 2015 AAPL guidelines); a few statutes mandate content, led by 18 U.S.C. 4247(c). No rule sets a maximum length.

Referral question and identifying data one opinion per question

Do: name who ordered or retained the evaluation, the statute or rule, the case caption, and each psycholegal question, pinned in writing before the first interview.

Pitfall: accepting "please evaluate the defendant"; every later section inherits the vagueness.

Notification and limits of confidentiality not treatment consent

Do: record what the evaluatee was told about purpose, recipients, and confidentiality limits, and how they responded; a court-ordered evaluatee often cannot decline.

Pitfall: reflexively writing "informed consent obtained"; the accurate record is notification given and understanding demonstrated.

Sources of information every source, dated and timed

Do: list every interview with date and duration, every record reviewed, every collateral contact, every instrument, ideally with the time devoted to each.

Pitfall: an undisclosed source surfacing on cross-examination; if it informed the opinion, it belongs on the list.

History, mental status, and findings attribute every fact

Do: give history at the depth the question requires, each fact attributed to its source ("Mr. R. reported"), plus observations across contacts with response style addressed.

Pitfall: self-report repeated as established fact, and silence on validity; both write the first cross-examination question.

Tests and instruments, with results results a judge can use

Do: name each instrument, why it fits this question, and the results in plain language; forensic tools and clinical tests play different roles, so say which is which.

Pitfall: scores reported but never connected to the legal standard the examiner was retained to address.

Psycholegal analysis and opinions reasoning stated, court decides

Do: link each finding to the legal capacity at issue, then state each opinion with its reasoning, limits, and currency, observing any ultimate-issue restriction.

Pitfall: a conclusion with no stated rationale; 63% of competency reports in one published review failed to state one.

Before you sign

- ☐ One legal question per opinion; nothing beyond the referral
- ☐ Notification recorded: purpose, recipients, response
- ☐ Every source listed with date and duration
- ☐ Every fact attributed; self-report kept separate
- ☐ Response style and consistency addressed
- ☐ Reasoning stated from findings to each opinion
- ☐ Statutory elements met; the legal decision left to the court

Drafting with AI

Give it the referral question, your interview notes, and test summaries; it drafts sections with each fact attributed to its source, organizes the analysis question by question, and flags a missing rationale or statutory element.

"Draft a competency evaluation report: two interviews done, records and collateral reviewed, statute requires the opinion stated."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

8 to 35 pages
2,500 to 10,000 words

10 to 40 hours
clinical team estimate

Evaluee, not patient
confidentiality limited

Not plan-billable
billed privately by agreement

Forensic Evaluation Report Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Evaluee (initials, age): _____ Court or retaining party: _____ Report date: _____

Matter and case number: _____ Examiner (name and credentials): _____

Referral question(s) and governing standard

The specific psycholegal question(s) · the statute, rule, or order that governs · one opinion per question

Notification given and response

Purpose and recipients explained · limits of confidentiality · the evaluee's response

Sources of information

Each interview with date and duration · each record reviewed · each collateral contact · each instrument

Relevant history

Psychosocial, medical, psychiatric, legal · every fact attributed to its source

Mental status, findings, and test results

Observations across contacts · response style and consistency · results in plain language tied to the question

Psycholegal analysis and opinion(s)

Each finding linked to the legal standard · reasoning stated · limits and currency · the legal determination is the court's

Signature and credentials: _____ Date: _____