



KATZ & LOIZEAUX  
Forensic Services LLC

Les Katz, PsyD, PC  
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## **Overview of Parental Responsibility Evaluation Forms For Attorneys**

### **Summary of our policies in working with attorneys and *pro se* parents**

- Information For Attorneys and *Pro Se* Parents Regarding Services Performed by Katz & Loizeaux Forensic Services, LLC

### **General Information forms we send to clients**

- Information about Court Ordered Parental Responsibility Evaluations
- Credentials Katz & Loizeaux Forensic Services' Team Members
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## **Information for Attorneys and *Pro Se* Parents regarding Evaluation Services performed by Katz & Loizeaux Forensic Services, LLC**

### **Court Orders**

When appointing mental health professionals at Katz & Loizeaux, the order should specify both the name of the professional appointed, and indicate that they are associated with Katz & Loizeaux Forensic Services, LLC. For example, if Dr. Loizeaux is appointed, the Order should state: **“The Court appoints Dr. Andrew Loizeaux of Katz & Loizeaux Forensic Services, LLC as Parental Responsibility Evaluator.”** The order should include names, addresses, and phone numbers of the parties and attorneys, names and ages of the children, reasons for the appointment, and the percentage each party is to pay for services. If there is a date when the report is due, this should be specified in the Order. Please see our fee policy form for information about fees.

### **Communication with Attorneys and *pro se* parties**

We divide communication with attorneys and *pro se* parties into two categories of communication, general case sharing and specific case sharing:

#### **1. *General case information sharing:***

With this type of communication we do not automatically disclose to the other attorney or *pro se* party that the communication occurred unless that attorney or *pro se* party specifically asks questions about it. Examples of general case information sharing are as follows:

##### **A. Prior to being appointed**

We will answer any questions an attorney or client has about our approach, credentials, experience, availability, fees, and potential biases. We want to get enough information about the case to decide if we are available, interested, qualified, and have no conflict of interest. When parents contact us, we will answer appropriate questions they have about the evaluation and about us. Emphasizing our need to be objective and neutral, we will request that they do not share details of their specific situation other than basic information about the family.

##### **B. After being appointed**

After being appointed, we need basic information about the case, such as addresses, phone numbers and emails of the parents. If this is not specified in the Order, or we do not receive a letter with this information, we will contact one or more of the attorneys to obtain this information. Later in the case, we may have other reasons to contact an attorney regarding general case information, such as finding out about dates of status conferences or hearings. Likewise, an attorney or staff person from the attorney’s office might contact us regarding similar type of information, such as our availability for particular Court dates.

#### **2. *Specific case information sharing:***

With this type of communication the attorneys and/or *pro se* parties will all participate jointly, or, if it occurs with only one attorney or *pro se* party, the other attorney or *pro se* party will be informed of the communication. Our general goal is to have transparency in our communications with attorneys. Examples of specific case information sharing, and how we prefer to handle it are as follows:

**A. Attorney-initiated communication at the commencement of a case**

In some cases, attorneys may want to share specific and detailed information about the case. We offer two options for handling this and will leave it up to the attorneys to decide. Option #1 would be for the attorney(s) to send us a letter or email, with a copy to the other attorney, summarizing the pertinent information. Option #2 would be for both attorneys to have a conference call with us. Either option provides each attorney an opportunity to present information he/she believes is relevant, and to know what we are being told by the other attorney. **We ask that an attorney copy the other attorneys on the case on all correspondence submitted to us.**

**B. Conference calls or meetings between the parental responsibility evaluator and attorneys and *pro se* parties.**

At any time during the course of our work, if all of the attorneys and *pro se* parties want to communicate with us jointly through a phone conference or other agreed upon method, we are receptive to that type of interaction. Likewise, the parental responsibility evaluator may want to talk to the attorneys. There are a variety of reasons that this might be done – to talk about problems or concerns that have arisen during the course of the evaluation, to talk about a change of circumstances that might impact the evaluation, to discuss settlement possibilities, etc.

**C. Parental responsibility evaluator-initiated contact with one attorney that occurs during the parental responsibility evaluator process.**

*In this type of communication, the communication will likely be disclosed to the other attorney either prior to the communication or soon after the communication occurs.*

There may be reasons that we will want to initiate communication with one of the attorneys. Examples are: a) when we are having difficulties enlisting the cooperation of a party in the parental responsibility evaluator process; b) when we have concerns about the behavior, demeanor, impulse control, etc. of the client; c) when we believe we have to do something that is not part of our general procedures, such as having to call Social Services regarding suspicion of child abuse, or asking for an outside professional to evaluate a client regarding something outside our area of competence; or d) when we need to get additional information regarding issues that might facilitate or impede settlement issues, after we have completed our evaluation. The decision, as to whether to inform the other attorney prior to or after the communication, will vary depending on such things as the circumstances of the case, the urgency of the need to communicate, the availability of the other attorney, etc.

**D. Attorney-initiated contact with the parental responsibility evaluator that occurs during the parental responsibility evaluation process or after the submission of a report**

*We ask that attorneys contact the other attorney prior to or immediately after initiating a call to the parental responsibility evaluator.*

Attorneys may have good reasons to contact us during the course of our evaluation. For example, there may be a change of circumstance in the case that we need to be informed of, or an issue we may need to investigate. In some cases, an attorney may want to clarify things their client has told them regarding the parental responsibility evaluator's process, behavior, or opinions. Attorneys either put this information in writing or call the parental responsibility evaluator directly.

After completion of the evaluation, an attorney may want to meet with us in preparation for settlement, depositions, and/or Court. Usually an attorney is interested in clarifying parts of the report, providing us with additional information, and/or developing an approach to examination or cross-examination. We believe that these are appropriate requests. We will inform the other attorney about the meeting, and offer them a similar opportunity to meet with us. There is no attorney work product in these situations, and if the other attorney asks questions about the meeting we will answer their questions.

### **Separate Agreements about Communication**

In some cases, the parental responsibility evaluator and the attorneys may agree that non-disclosed communication between either attorney and the parental responsibility evaluator is acceptable. Generally, this is the case when the parental responsibility evaluator and the attorneys have developed a trusting and cooperative relationship.

### **Other Information for Attorneys**

#### **Communication with Other Court-Appointed Professionals**

If there are other Court appointed professionals involved in the case, such as a Child's Legal Representative, a Parenting Coordinator, and/or an Arbitrator, we may need to communicate with them during the course of our work. We do not generally disclose these communications ahead of time, unless we believe there are specific reasons that they should be disclosed. Our general policy is to form our own impressions about a case prior to talking to other Court appointed professionals involved in the case.

#### **Client forms**

We send clients a packet of forms to fill out when we start working on a case. These forms are for the clients to complete, not for attorneys to fill out, for they are part of the evaluation data regarding the client. Clients may wish to provide copies of their completed forms to their attorneys. Attorneys will receive copies of some of these forms (See Overview of Parental Responsibility Evaluation Forms for Attorneys) in the packet sent to them. Our forms can always be downloaded at our web page ([www.klfs.net](http://www.klfs.net)).

#### **Additional Staff Working on Cases**

The staff at Katz & Loizeaux often utilizes the services of more than one professional, either a co-evaluator model, or a model of a parental responsibility evaluator utilizing the services of a staff assistant. The person named on the Court Order of appointment, however, assumes responsibility for the services and provides any necessary supervision or consultation for other professionals providing services. We will generally inform the parties about if and who will work with the named parental responsibility evaluator, sometime after the initial interviews with both parties. In some of our cases we utilize staff members to provide typing and/or editorial services during report writing. In all of our cases, we also utilize the services of our Office Manager for administrative purposes such as case set-up, mailings, billing, copying, report distribution, etc.

#### **Obtaining Pleadings and Other Documentation**

We need to receive copies of pertinent Pleadings and Court Orders, including the Court Order appointing us. The Order should specify which attorney or *pro se* party is to provide us with this information. Upon sending us this information, please inform the other attorney as to what pleadings and documents have been sent so they can verify that we have a full record of pertinent pleadings and documents.

We do not need to be sent pleadings that are not pertinent to the best interests of the children. We do not need to be copied on all of the correspondence between the attorneys unless there is some agreement between the attorneys and the parental responsibility evaluator that such correspondence is relevant to the evaluation.

Often, one or both attorneys have obtained important documentation relevant to our evaluation. They may have copies of police reports, medical files, social services evaluations, etc. We encourage attorneys to send us copies of this type of information, as long as they inform the other attorney as to what documents are being sent. This will not only save us some time and labor, but will help insure that the parental responsibility evaluator and the attorneys have access to the same documentation.

### **Information from Collateral Sources**

We will be discussing with your clients which collateral sources, if any, should be contacted. Professional collateral sources are sent releases of information and are often contacted directly. Personal collateral sources, such as family and friends, may fill out questionnaires that have been provided to your client. Attorneys may already have written materials from these sources, and can furnish these also, however, we will engage in an independent review of these sources.

### **Clarity about the Scope of the Order and the Legal Standards**

The Order will generally specify both the scope of the evaluation, and the pertinent legal standards to be applied on the case. When there are uncertainties or disagreements about the scope of the appointment or about which standard is to be applied, we will seek to get some clarification about this, generally either through a conference with the attorneys, or by asking for a status conference with the Court. In some cases, if there is a disagreement about the legal standards, which will be determined at a later Court hearing, we will seek to apply all of the possible relevant standards to the case.

### **Attorney Involvement in Feedback Sessions**

Feedback sessions are often provided to clients upon their request, in order to provide further clarity and receive feedback regarding our evaluation. When we schedule feedback sessions, we prefer to have such sessions with the client alone. Having an attorney present for a feedback session changes the dynamics, and may rob us of some potentially useful information. There may be situations where it could be helpful to have a client's attorney involved, or that it has been requested by an attorney to be present. If this occurs we would likely have feedback time with the parent alone and then additional time with the parent with his/her attorney present. If an attorney is allowed to be present in the feedback sessions then the attorneys for both clients are extended the same opportunity.

### **When One Or Both Parties Are *Pro Se***

There are some special considerations in these cases, for the *pro se* parent is serving two roles, as an attorney and as a parent. If you are *pro se*, we will offer you the same opportunity to share information about the case, as we would any attorney, and will follow the guidelines spelled out above regarding communication with attorneys. Once you come in for your initial appointment however, we need to work with you as a parent. When attorney-type and litigation-related communications must occur, we will again follow the guidelines spelled out above regarding communication with attorneys

### **The Use of Psychological Testing**

We use psychological testing of parents on a case-by-case basis, but such testing is never the sole basis for making parenting time or parental responsibility recommendations. We may also, on occasion, use psychological testing with children.

### **Release of our files**

Our policy regarding release of our file of underlying data prior to the hearing is: a) we do not release our file until we have submitted our report; b) we generally do not release incomplete file; c) we will inform the other attorney or *pro se* party about the request for a release, either to see if they also want a copy, or to see if they have specific objections to the release; and d) in cases where we think that the release of the data would endanger any person's welfare, we will temporarily withhold the data and inform the Court as to our concern.

If an attorney exercises his or her right to request a copy of our files, copies will be charged at flat rate charge of \$100, and will be delivered by a cloud based service. If courier delivery services are requested, the delivery charges will be added to the bill. If a copy of our file is requested to be delivered in paper format, the photocopying of our files will be charged at \$0.40 per page, postage or messenger services will be charged at the actual cost, and administrative time for copying the files and preparing the copies for sending will be applied.

After the completion of our report, and the hearing pertaining to our report has concluded, we will not release our file unless: a) there is specific signed release by both parents to provide our file of underlying data; or b) a Court order is obtained directing us to release our file.

### **Release of Psychological Testing**

When releasing psychological test data, per the Ethical Code of the American Psychological Association, we release those only those portions of test materials that include client responses, testing scores, and testing profiles. We do not release the actual tests themselves or the testing questions.

Thank you,

*Katz & Loizeaux Forensic Services, LLC*









## **Credentials of Katz & Loizeaux Forensic Services Team Members**

**Les Katz, PsyD**, is a Licensed Clinical Psychologist in the State of Colorado. He received his doctorate degree from the University of Denver School of Professional Psychology in 1981, and has been licensed since 1984. He specializes in divorce and remarriage issues. He provides Parental Responsibility Evaluations, consultation to attorneys, intervention services for high conflict families, and supervision to other professionals. Dr Katz co-chaired the Denver Interdisciplinary Committee that produced the March 2001 Special Advocate Guidelines. Dr. Katz has also chaired that organization's committees that developed Guidelines and Revised Guidelines for parental responsibility evaluators. He has also taught classes on forensic psychology to graduate psychology students at the University of Denver.

**Andrew Loizeaux, PsyD**, is a Colorado Licensed Clinical Psychologist who received his doctoral degree from the University of Denver in 1991, and was licensed in Colorado in 1993. Dr. Loizeaux conducts parental responsibility evaluations, and specializes in supplemental evaluations, interstate and international disputes, child abductions, removal issues, evaluation critiques, attorney consultations and expert testimony. He has testified as an expert witness in all Denver metro counties and he has served as a court-appointed expert pursuant to Federal Rules of Evidence 706. Dr. Loizeaux is a member of the Colorado Psychological Association's Ethics Committee, and serves as a consultant with the Colorado Department of Regulatory Agencies and the Colorado Attorney General's Office. Dr. Andrew Loizeaux also provides individual and marital psychotherapy for marital discord, separation adjustment, parent/child conflict and trauma.

**Toni Backman, PhD**, is a Licensed Clinical Psychologist in Denver, Colorado. She received her Ph.D. in clinical psychology in 2002, where she completed a dual emphasis in forensic and child/family psychology. Dr. Backman's work has included a focus on issues of young childhood, foster care and adoption, divorce, trauma, depression and anxiety, domestic violence, and substance abuse. Dr. Backman specializes in working with families surrounding issues of pregnancy, parenting, and parent-child relationships. She has held faculty appointments in the Irving Harris Program in Child Development and Infant Mental Health at the University of Colorado Denver and with the California School of Professional Psychology. Dr. Backman serves as a co-evaluator in parental responsibility evaluations, and provides intervention services for high conflict families at Katz & Loizeaux. She maintains a private practice where she provides psychotherapy for adults, young children, couples, and families.

Felicia Greher, PhD, is a Licensed Clinical Psychologist in the State of Colorado. She joined Katz & Loizeaux in 2013 and serves as a co-evaluator on Parental Responsibility Evaluations. She received her doctorate degree in Clinical Psychology from the University of North Texas in 2006, and has been licensed since 2007. Dr. Greher has provided individual and group therapy, as well as psychological and neuropsychological assessments across a variety of clinical settings (i.e., private and county hospitals, community-based clinics, university counseling centers, and private practice). She specializes in the assessment and treatment of anxiety, depression, and trauma. Other areas of clinical focus include interpersonal conflict, grief/loss issues, and navigating through significant life transitions. In her private practice, she specializes in psychotherapy with adults and couples, and psychological assessment services.

**Jeanie Hackey**, Case Manager on Dr. Katz' parental responsibility evaluations, joined Katz & Loizeaux in 2016. She graduated with honors with a Bachelor of Science in Sociology and Business Administration from North Dakota State University in 1983 and received a Bachelor of Science in Paralegal Studies from Moorhead State University in 1988. Ms. Hackey worked as a paralegal in private law firms for 28 years with a majority of her experience in the area of family law working with clients in dissolution of marriage and child related matters. Her role at Katz & Loizeaux includes file review, document management, and client support.

**Kathryn Kilian, MA, LPC**, received her Master's degree in counseling psychology from Regis University in 2000, and has worked in the field of addictions for over 25 years. Ms. Kilian joined Katz & Loizeaux in 2007 and serves as a Parental Responsibility and co-evaluator, and provides alcohol/substance abuse evaluations. In her clinical practice she worked with individuals who were addressing divorce recovery and couples with step-parenting issues, as well as individuals with co-addiction matters. In addition, Ms. Kilian has provided parental risk assessments, court-ordered and forensic/mental health evaluations for attorneys, public defenders, and probation departments.

## **FEE POLICIES FOR COURT-RELATED EVALUATIONS AND SERVICES**

The professionals of *Katz & Loizeaux Forensic Services, LLC* perform a variety of family court-related evaluations and services, including parental responsibility evaluations, parenting coordination, and mediation/arbitration.

This document spells out our fee policies and procedures regarding our provision of services. We recommend that you discuss our policies with your attorney prior to signing the Fee Agreement. If a Court Order specifies that you are responsible for a portion of the “initial costs” of an evaluation, these “initial costs” are defined as the entire cost for our court-ordered role. We request that you fill in and sign the Fee Agreement regarding your responsibility for our fees. These fees are described below.

### **Retainers**

Retainers must be paid in full prior to the commencement of any services. ***A partial payment of retainer will not be accepted.***

Retainer for Les Katz, PsyD, and Andrew Loizeaux, PsyD: \$8000

Retainer for Felicia Greher, PhD, and Kathryn Kilian, MA, LPC: \$6,000

The Retainer may be higher in cases where one or both parents live outside of the Denver Metropolitan Area, and/or complex cases that require additional services. If a lower retainer is specified in the Court Order, unless prior arrangements have been made with us, our full retainer fees must still be paid. One half of your retainer payment will go to services to be provided, the other half will be held in your retainer account. For example, if you pay \$3,000, as your portion of the initial retainer, \$1,500 will serve as payment for the initial services provided and \$1,500 will be held in your retainer account. This retainer account will be held until payment is needed for final services delivered, or if payment is not forthcoming for services delivered. Funds not used will be refunded to you at the conclusion of our role in and services for the case. This is typically defined as the final court date or the date a stipulation is reached, and not the date we release the report.

### **Payment**

You will be given monthly statements reflecting your current balance. You should receive an invoice approximately the third week of each month. Payment of the full amount owed on this invoice is due within two weeks of the invoice date. If full payment is not received within two weeks of the invoice date, a monthly **late fee of \$25** will be assessed for each month you are late until your balance is paid in full. The Court’s assistance may be requested at any time pertaining to payment issues.

**Payment in full is required before our evaluation report will be released to you or the Court.**

**Fees:**

\$320 per hour for services provided by Les Katz, PsyD,  
\$360 per hour for services provided by Andrew Loizeaux, PsyD  
\$210 per hour for services provided by Toni Backman, PhD  
\$180 per hour for services provided by Felicia Greher, PhD  
\$120 per hour for services provided by Jeanie Hackey  
\$220 per hour for services provided by Kathryn Kilian, MA, LPC

These fees apply to all services, including but not limited to: interviews, contacts with references, phone contacts, home visits including travel time, consultations, review of records, and test interpretation time. These fees also apply to all post-report services, including but not limited to: settlement discussions, attorney consultations, preparation for depositions or court, and deposition and court testimony time, including travel and waiting time.

**Fees When Two Professionals Provide a Service:**

In situations where two of our professionals are working together on the same case, we charge a lower hourly fee for each professional when both professionals are involved in the same service (for example, both professionals may jointly conduct an interview with a parent). The same charges apply for staffing when two Katz & Loizeaux professionals discuss a case. Fees in these situations are:

\$280 per hour for services provided by Les Katz, PsyD  
\$300 per hour for services provided by Andrew Loizeaux, PsyD  
\$180 per hour for services provided by Toni Backman, PhD, Kathryn Kilian, MA, LPC  
\$150 per hour for services provided by Felicia Greher, PhD  
\$90 per hour for services provided by Jeanie Hackey

**Fees for Report Writing**

Report writing is billed at the hourly rate of each professional contributing to the report, at one hour per page. For example, for a 12 page report, if Dr. Katz wrote six pages and Dr. Backman wrote six pages, you would be billed a total of \$3,180 (6 x \$320 plus 6 x \$210).

**Fees for Psychological Testing**

If psychological tests are used, there will be additional charges for materials, scoring, administration, and interpretation. Typically, testing materials and scoring will be billed at \$50-\$100 per test. Administration and interpretation of testing are billed at our hourly rates, with administration typically requiring 15 minutes, and interpretation typically requiring 30 minutes to 60 minutes per test. If projective or specialized testing is requested of you, charges for these services will be discussed with you prior to any administration of such.

**Fees for Services Involving Travel**

When travel does not require overnight lodging, we charge our hourly rate from the time we leave our office until we return to our office. This includes all of the time involved, including travel time, direct services provided, and any waiting time. Examples of these kinds of charges

include travel for a home visit, or travel time to and from Court, as well as waiting time in Court. When travel requires one or more overnight stays away from our office, such as travel to a different state, we charge for all expenses and for the time involved getting to and returning from our destination, as well as the time spent for direct services. Travel expenses include airline tickets, rental cars, parking fees, gasoline charges, hotel charges, and meals. Travel time is billed at our hourly rate for driving time to the airport, airport waiting, time in flight, and travel time to our destination. Direct services are billed at our hourly rate.

### **Fees for Professional References**

When professional references that we contact for information send us a bill for their time, file duplication and/or postage, those charges will be passed onto you.

### **Fees for Late, Missed and Canceled Appointments**

Appointments not canceled or rescheduled at least 24 hours in advance will be charged at the hourly rate for the allotted appointment time.

### **Fees for Consultants**

Under some circumstances, we may require the services of, or require consultation from, other professionals outside of the Katz & Loizeaux staff, with specialized areas of expertise. Such areas of expertise can include cultural or religious issues, medical issues or medications, complex legal issues, and drug and alcohol abuse issues. When the professional bills us, we will pass the charges onto you. If these services are required, you and your attorney will be informed ahead of time about the need for these services and the anticipated charges.

### **Administrative Charges**

There will be a charge of \$50 per hour for administrative costs related to case information set up, preparation of releases of information, preparation of letters and faxes, transcription of dictation, file copying, report preparation, and other administrative type tasks.

### **Duplication and Postage Charges**

If we are required to submit a report, there will be a \$50 charge for duplication, preparation, and delivery. This fee covers the duplication of letters, rough drafts of the report, final copies of the report, and delivery by postal service or email. If you or your attorneys request delivery by any other form than the postal service, these delivery service charges will be passed onto you.

We will not release a copy of any case files until our assessment is complete and the report has been submitted. We require at least a one-week notice when requesting a copy of our files.

If an attorney exercises his or her right to request a copy of our files, the photocopies will be charged at flat rate charge of \$100, and will be delivered by postal service (on flash drive or CD), or delivered by email or a cloud based service. If courier delivery services are requested, the delivery charges will be added to the bill. If a copy of our file is requested to be delivered in paper format, the photocopying of our files will be charged at \$0.40 per page, postage or messenger services will be charged at the actual cost, and administrative time for copying the files and preparing the copies for sending will be applied.

### **Fees for Post-Report Services**

Unless specified differently in a Court Order, fees for post-report services will be charged as follows:

**Contacts with Attorneys:** When one of our professionals has phone contacts and/or meetings with your attorney that occur *after* our final report is submitted to the Court, you will be responsible for 100% of the charges for these fees, no matter what percentage you paid for the evaluation itself. We charge our usual hourly fees for these services. You will be charged for these services because attorneys use these post-report meetings in preparation for settlement and/or for Court. In most cases, we will bill your attorney directly for these post-report phone contacts and meetings, and they will pass the charges onto you.

**Court Testimony and/or Deposition Services:** The party who requests our presence in Court is the party who is responsible for payment of our fees. If you or your attorney request that we testify in a deposition and/or in Court, *you* will be responsible for all evaluator time and expense charges, including preparation for testimony, travel time to and from Court, and time spent in Court; unless both parties specifically agree to a different payment arrangement, or if the Court orders a different arrangement. We require a separate retainer for these services, unless we are already holding a retainer from you that would be sufficient to cover the estimated time required.

### **Fee Changes**

All rates in our office are subject to periodic review and adjustment. We will advise you in advance of any adjustment and that notice becomes part of our agreement. If the adjustment is not acceptable to you, you may file a motion with the Court and seek their guidance.

### **Fee Collections**

If you become delinquent in or default on the payment of your bill, Katz & Loizeaux Forensic Services, LLC, reserves the right to inform the Court, to refer the account to an attorney or a collection service for collection, to ask the Court for a judgment, and/or to file Contempt of Court papers with the Court. You will be held responsible to pay all fees and expenses associated with any collection efforts. Consent is given to Katz & Loizeaux Forensic Services, LLC, for release of your name, demographic information, nature of service, and any other necessary data to an attorney or collection service in the event of delinquency in or default on the payment of monies owed to Katz & Loizeaux Forensic Services LLC.

### **Credit/Debit Card Authorization**

We accept American Express, Discover, MasterCard, and VISA cards. If you wish to use your card for retainer or any/or all services, please fill out the Credit/Debit Card Pre-Authorization Form.