

Anecdotal Notes & Progress Log



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16 pages: two sections and a worked example. This file records what was seen and heard, dated and tagged; it does not decide what a pattern means or when a meeting is warranted — that stays your team's own call.

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NOT THE SAME SHAPE AS THREE OTHER FILES IN THIS STORE

Behavior Data Collection Sheets

Counts a target behavior — ABC, frequency, interval, scatterplot. This file has no counting mechanic; it is a dated sentence, not a tally.

Behavior Observation Forms

A single-visit protocol for a psychologist or specialist walking into one room once or twice. This file stays open across a grading period, for every goal, not one visit.

IEP Goal Tracking Editable

Trial-by-trial and percent-correct numbers, with a graph. This file carries no number column at all — it is the words a graph cannot hold.

WHY A CASE MANAGER KEEPS BOTH

A number says a goal moved; a dated note says what the day actually looked like when it did. The roll-up on page 12 is built to sit beside a numeric tracker's graph at the same meeting, not replace it.



START HERE

Start Here — Three Steps

Ninety seconds of reading. Set the index and the tag key up once; each day after that is one dated sentence.



1

Set up once

Print the binder cover, divider tabs and goal-tag key (page 5) at the start of the grading period, and fill in the caseload index (page 11) once.

Print one copy of the individual dated log (page 7) per student, or use the whole-caseload quick notes (page 8) for a lighter week.



2

Log every day, in seconds

Write what you saw and heard, with a date, a setting and a goal or skill tag — never what you concluded about why it happened.

Hand the quick-note slip (page 9) to a paraprofessional or related-service provider who is in the room more than you are.



3

Roll it up and report it

Once a month, fill in the roll-up (page 12) from the dated notes, then turn it into the ready-to-send update (page 13).

Borrow language from the phrase bank (page 14) instead of staring at a blank line before an IEP meeting.

WHAT THIS FILE IS

A fillable PDF. The fields are built into the document itself, so it works offline with no account or subscription and looks the same on every machine that opens it. Every page also prints blank for a pen.

WHAT THIS FILE IS NOT

Not a Google Sheets file, a Google Doc, or an Excel workbook, and it does not count a behavior or graph a goal for you. It is also not a one-visit observation protocol — it is a log that stays open across a grading period.

THE RULE EVERY ROW IN THIS FILE FOLLOWS

Write what a clock and a camera would have recorded: “Read the passage without a prompt” is a note; “is finally getting it” is not. No page here states what a pattern means, sets a threshold for a meeting, or names a condition — your team writes that on its own paperwork.

IF SOMETHING DOES NOT WORK

The text disappears when I close it. It was opened in something that fills fields but does not save them. Open it in Acrobat Reader and use Save As.
I need more rows than a page holds. Print a second copy of the dated log (page 7) or the quick notes (page 8); the roll-up only needs the totals.
Anything else — the **Ask a Question** tab on the product page. Every question is read, and a fix to the file is a free update.

CONFIDENTIALITY

A filled-in page is a student record the moment it is written. Keep it with your other case files, not loose on a desk, and follow your district’s own records and FERPA policy for anything that leaves your hands.

 LOG

Dated Note Log — One Student

Print one copy per student per grading period. One row per dated observation: what was seen and heard, not what it means.

STUDENT

SCHOOL YEAR

CASE MANAGER

PRIMARY GOAL / SKILL TAG

#	DATE	SETTING	GOAL / SKILL TAG	NOTE — WHAT YOU SAW AND HEARD	INITIALS
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

WHAT BELONGS ON THIS PAGE

“Read the decodable passage without a prompt” is a note; “is finally getting it” is not. Write the setting (classroom, hallway, cafeteria, home visit) and the tag from the goal-tag key, every time, so the roll-up (page 12) can sort by both later.

ONE PAGE PER STUDENT, REUSED ACROSS THE TERM

Print or copy one of these pages per student you are watching this term rather than starting a new page each time — 12 rows covers about one entry a week across most grading periods. Print a second copy if a student needs more.



Whole-Caseload Quick Notes — Week at a Glance

The whole caseload, one week, one short note each — for the week the individual log (page 7) does not get opened for every student.

CASE MANAGER

BUILDING

WEEK OF

#	STUDENT	DATE	GOAL / SKILL TAG	QUICK NOTE	INITIALS
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

FOR THE WEEK YOU CANNOT OPEN EVERY FILE

One short, observable line per student, for a whole week at a glance. Anything worth more than a line moves to that student’s own dated log (page 7) instead of staying only here.

WHO THIS PAGE IS FOR

- ☐ A case manager with a caseload too large to open every student's own log every day.
- ☐ A week with nothing unusual to report for most students — a one-line note beats no note.
- ☐ A quick cross-check against the caseload index (page 11) before a meeting.

TRACKER

Monthly Roll-Up for the Progress Report

Once a month, count the dated notes for each student and goal tag and write what they show. This is the page a progress report gets pulled from.

CASE MANAGER

BUILDING

MONTH / TERM

PREPARED

#	STUDENT	GOAL / SKILL TAG	NOTES THIS MONTH	WHAT THE NOTES SHOW (ONE LINE)	TREND
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

COUNTING AND SUMMARIZING, NOT JUDGING

Count the dated notes for each student and tag from the log pages (pages 7–8) and write one line that summarizes what they showed. “Trend” is one of four plain words: **more often**, **about the same**, **less often**, or **not enough notes yet** — never a clinical finding or a prediction.

WHERE THIS PAGE GOES NEXT

This is the page a progress report or an IEP meeting note gets pulled from. Turn a row into a ready-to-send update on page 13, or into a finished sentence using the phrase bank on page 14.

NOTES

Progress Update, Ready to Send

Ready to send after a month of dated notes. Built from the roll-up two pages back, never written from a blank page.

STUDENT

MONTH / TERM COVERED

PREPARED BY

WHAT THIS MONTH'S NOTES SHOW

Pulled from the roll-up (page 12), one tag at a time.

ONE THING GOING WELL

ONE THING WE ARE WATCHING

Describe the pattern across several notes, not a single day.

WHO WAS TOLD, AND WHEN

#	SHARED WITH	DATE	HOW
1			
2			
3			

WHAT'S NEXT

GOING TO (FAMILY / TEAM / IEP FILE)

DATE SENT

EXAMPLE

A Month of Notes, Filled In — Invented Student

SAMPLE · INVENTED STUDENT

Noah P. is an invented student, and so is every note, count and date on this page. Every number traces back to the rows above it.

Noah P. (invented student, not a real child). Month shown: October. Case manager: J. Ruiz (invented).

DATED NOTE LOG (PAGE 7) — FOUR ENTRIES THIS MONTH

#	DATE	SETTING	TAG	NOTE	INITIALS
1	10/1	Classroom	Reading	Read the decodable passage without a prompt, start to finish.	JR
2	10/8	Classroom	Reading	Needed one verbal prompt to begin the independent reading block; finished without further prompting.	JR
3	10/15	Resource room	Math	Completed the worksheet with manipulatives, no prompts needed.	JR
4	10/22	Cafeteria	Social / Behavior	Asked a peer to trade seats using words; no incident.	para, M.T.

MONTHLY ROLL-UP (PAGE 12) — 4 DATED ENTRIES THIS MONTH

GOAL / SKILL TAG	NOTES	WHAT THEY SHOW	TREND
Reading	2	Independent on 1 of 2 entries (50%), up from 1 of 3 (33%) last month.	More often
Math	1	Independent on 1 of 1 entries (100%).	Not enough notes yet
Social / Behavior	1	One note, no incident; used words to resolve a seating request.	Not enough notes yet

PROGRESS UPDATE (PAGE 13), BUILT FROM THE ROLL-UP ABOVE

What this month's notes show: Reading independence moved from 33% to 50% across 2 dated entries.

Going well: Completed the 10/15 math task fully independently with manipulatives.

Watching: Only one Social / Behavior note logged this month — not yet enough to call a pattern.

WHY THIS IS ENOUGH

Every sentence on the progress update came from a row already written on the roll-up, and every roll-up row came from a dated entry already written on the log — nothing on this page is typed twice without a page to check it against.

HOW EVERY NUMBER ABOVE CHECKS OUT

- ☐ Reading: 1 independent of 2 entries = 50 percent, rounded to the nearest whole number.
- ☐ Last month's reading baseline: 1 of 3 = 33 percent.
- ☐ Math: 1 of 1 = 100 percent.
- ☐ Total dated entries this month: 2 reading + 1 math + 1 social/behavior = 4.