

EDITABLE

The therapist's clipboard: attendance and make-ups, task analysis with prompt levels, six data sheets, consult log, tracker and graph, notes, quarterly summary. Fillable PDF.

[illegible]

BRIGHT PATH SPEED

Which Sheet for Which Goal

Match the goal's wording to a sheet once, in September, and write the page number on the roster. After that nobody has to think about it.

IF THE GOAL SAYS	USE	WHERE
"will cut along a curved line" / "will write first name legibly" / "will zip" — trials that are right or wrong	Session data sheet	Page 9
"will complete the ___ routine with no more than ___ prompts" / "will independently follow the steps to"	Task analysis sheet with prompt levels	Page 10
"will maintain an upright posture" / "will participate in PE" / "will use a tripod grasp in context"	Skill rating sheet, with the four levels defined first	Page 11
"for ___ minutes" / "___ feet" / "___ repetitions" / "within ___ seconds"	Duration, distance and count sheet	Page 12
Anything that leaves a product on paper	Work sample log, with the sample stapled behind it	Page 13
Consultation minutes, push-in visits, teacher requests	Consultation log	Page 14
Any goal, across the quarter	Cumulative tracker and graph, then the quarterly summary	Pages 16, 17, 19

What this file is not

Not a therapy program, not an exercise list, not goals, and not an evaluation. Nothing here says which prompt to use, when to fade it, what equipment a student should have, or how to handle a student; you write those in, from the IEP and your own judgment. The sheets only make sure the number gets written down.

The three habits the file assumes

- ☐ The criterion from the IEP is written at the top of every data sheet before the first trial.
- ☐ The number goes from the data sheet to the tracker (page 16) the same day.
- ☐ The make-up log (page 8) is updated the day a session is missed, not at the end of the month.

How the paper moves

WHEN	WHAT
Every session	One data sheet (9 to 13) or the consultation log (14), one half of a session-notes page (18), attendance ticked (8)
Every week	Numbers onto the tracker (16); home note (20) for whoever needs one; carryover sheet (21) out to one teacher; equipment check (15) if anything moved
Every quarter	Graph (17) plotted, quarterly summary (19) written from it, make-up log totaled

Attendance and Make-Up Log

THERAPIST

MONTH

**CODES: A ABSENT · S SCHOOL EVENT ·
T THERAPIST OUT · R REFUSED /
UNAVAILABLE**

[illegible]

One 30-minute session a week in a four-week month is four; write 4. Consultation minutes get their own row if the IEP lists them separately. A missed session gets a date and a code the same day; a made-up session gets its date in the last column. Whether therapist-out sessions must be made up is your district's rule; write it on page 5 and follow it.

Task Analysis Data Sheet

One routine broken into up to twelve steps, eight sessions across. Write the most help the student needed for each step. The goal is a column of I's.

STUDENT

ROUTINE / TASK

CRITERION FROM THE IEP

PROMPTS THAT COUNT AS CORRECT

#	STEP (IN THE ORDER IT HAPPENS)	S1	S2	S3	S4	S5	S6	S7	S8
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
	Date								
	Steps independent								
	Percent independent								

Write the prompt code, not a check mark

An I in the cell is independent; V, G, M, PP or FP is the most help that step needed (codes on page 5). The bottom rows count the I's. A step that stays at FP for four sessions may need to be split in two; write that on the tracker with the session number.

Setup, positioning and materials that must be the same every time

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.....

.....

.....

SCHOOL YEAR

[illegible]

If the IEP lists consultation minutes, this page is the proof they happened, and the minutes column feeds the attendance log. A recommendation that a classroom cannot do in the next hour is not a recommendation yet; write the version they can.

Progress Graph

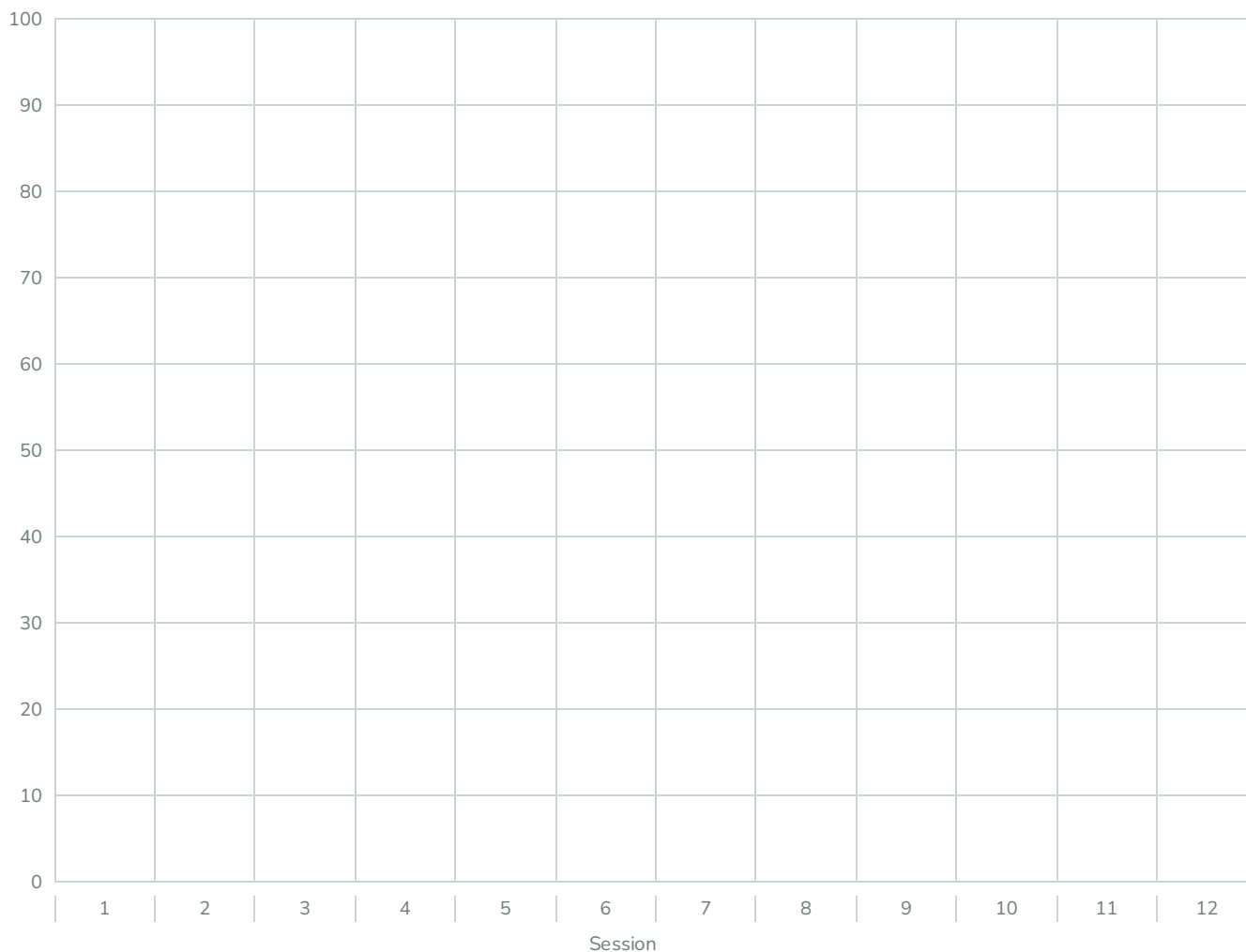
Plot the tracker. The aim line is the criterion from the IEP; the dots are the sessions. Three dots below the line in a row is a conversation, not a wait.

STUDENT

GOAL (SHORT)

CRITERION / AIM

PERCENT, STEPS INDEPENDENT, MINUTES, FEET (LABEL IT)



SESSION	1	2	3	4	5	6	7	8	9	10	11	12
Date												
%												
Level												

Reading it

Draw the aim line at the criterion first. Three dots under it in a row: change the prompt, the setup or the materials and mark the session number on the tracker. Three over it in a row: move up a level. A flat line at the same level for six sessions is a conversation with the team, not a longer wait.

EXAMPLE

A Task Analysis Sheet and a Session Note, Filled In

An invented second grader and an invented OT. Every mark is made up. Notice how little writing it took and how much the note still says.

Task analysis sheet (page 10) — Priya, grade 2, cutting a curved line (invented)

Criterion from the IEP: 6 of 7 steps independent on three consecutive sessions · **Prompts that count as correct:** none (only I counts)

#	STEP	S1	S2	S3	S4	S5	S6	S7	S8
1	Pick up scissors, thumb in small loop	FP	FP	PP	PP	G	V	I	I
2	Hold paper with helper hand	PP	PP	G	G	V	I	I	I
3	Open and close blades on the line (straight)	PP	PP	PP	G	G	G	V	V
4	Turn paper at the corner	FP	FP	PP	PP	PP	G	G	V
5	Cut the curve	FP	FP	FP	PP	PP	PP	G	G
6	Stop at the end mark	G	V	V	I	I	I	I	I
7	Put scissors down, blades closed	V	V	I	I	I	I	I	I
	Date	9/2	9/4	9/9	9/11	9/16	9/18	9/23	9/25
	Steps independent	0	0	1	2	2	3	4	4
	Percent independent	0	0	14	29	29	43	57	57

Steps 6 and 7 reached I by session 4 and stayed there; steps 1 and 2 by session 7. Steps 3, 4 and 5 are the work: the blades, the corner and the curve. Session 8 has 4 of 7 independent, still short of the criterion, and the line on the tracker is up or flat every session, never down. Step 5 sat at FP for three sessions and was split into two half-steps on 9/11 (noted on the tracker); it reached G on 9/23.

Attendance log (page 8) — September

STUDENT	OWED	SEEN	MISSED: DATE / CODE	MADE UP
Priya S.	8	9/2, 9/4, 9/9, 9/11, 9/16, 9/18, 9/23, 9/25	—	—

Session note (page 18) — 9/11

Targeted, and the data: curved-line cutting, task analysis, 2/7 steps independent. **Response:** step 5 (the curve) full physical for the third session in a row; split it into “turn the paper” and “small snips” and she managed the snips with a partial physical prompt. **Plan:** keep the split, send the home note with the thick-line curve sheets, ask Ms. Ortiz to note cutting at centers on the carryover sheet.

Why this is enough

Every decision came from a cell that was already written: the split of step 5 from three FPs in a row, the home note from the step that moved, the carryover request from the steps that reached I. The quarterly summary in November is a copying job, and the graph shows the step-splitting session as a marked change instead of a mystery.