

PRESENT LEVELS TEMPLATES FOR RELATED SERVICES

A data inventory, seven present level templates — speech sound, language, occupational therapy, physical therapy, counseling and social work — a strengths and interests bank, fourteen effect-on-participation frames, a data-to-sentence worksheet, a twelve-item self-check, and a filled example. Fillable PDF.

SETUP Data Inventory

Before a single sentence is written, what data actually exists on this student, who reported it, and when. Twelve rows. A blank row is a finding, not a failure.

STUDENT	PROVIDER AND ROLE	INVENTORY COMPILED ON

END OF DATA	SOURCE, AND WHO REPORTED IT	DATE	WHAT IT SAYS, IN THE WORDS OF THE REPORT	Goes on PAGE
Evaluation, as reported				
Evaluation, as reported				
Evaluation, as reported				
Probe or trial data				
Probe or trial data				
Observation in class				
Observation in class				
Work sample				
Attendance and minutes				
Family report				

SPEECH Speech Sound Present Level Template

Sounds in error by position, percent of word, sentence and conversation level, stimulability and intelligibility as they were reported, and what it does in class.

STUDENT AND GRADE	PROVIDER AND ROLE	DATES OF THE DATA USED

SOUNDS IN ERROR, AS MEASURED
On _____ (date), on _____ (the measure or probe, as it is named in the file), the sounds recorded in error were _____ in the positions, as reported by _____.

PERCENT AT EACH LEVEL
_____ produced _____ correctly in _____ of _____ words (_____%) on _____ in _____ of _____ sentences (_____%) on _____ and in _____ of _____ opportunities in a _____-minute conversation sample (_____%) on _____.

STIMULABILITY, AS REPORTED
On _____ (date), _____ produced _____ correctly with _____ (a model, a cue, a model in _____ of _____ trials. Leave this blank if no stimulability probe is on file).

INTELLIGIBILITY, AS REPORTED
In _____ (setting), _____ was understood by _____ (a familiar or an unfamiliar listener) _____ as reported on _____ by _____ (listeners asked for a report _____ times in _____ minutes. Leave the rating blank if the file does not give one).

SPEECH Language Present Level Template

Receptive, expressive, narrative and pragmatic, each with the number, the number of opportunities, and the date it was taken.

STUDENT AND GRADE	PROVIDER AND ROLE	DATES OF THE DATA USED

RECEPTIVE
On _____ (date, measure) _____ followed _____ step directions in _____ of _____ opportunities (_____%) when _____ (given how). With _____ (a visual, a repetition, extra wait time) _____ of _____.

EXPRESSIVE
On _____ (date, measure) _____ used _____ (words, phrases, sentences) of about _____ words, and produced _____ (the target form) in _____ of _____ opportunities. The errors recorded were _____.

NARRATIVE OR RETELL
Given _____ (a prompt, a story read aloud, a personal topic) on _____ told _____ events in order and included _____ The sample was _____ (length), taken by _____.

PRAGMATIC
In _____ (setting), across _____ minutes on _____ initiated _____ times, responded to _____ of _____ peer bids, and _____.

OT Occupational Therapy Present Level Template

Fine motor, visual motor and written output, a self-care routine as a percent of steps, and the sensory supports the team has already written down.

STUDENT AND GRADE	PROVIDER AND ROLE	DATES OF THE DATA USED

FINE MOTOR, AS MEASURED
On _____ (date, measure) _____ (grasp, in-hand manipulation, cutting, fastening, in the words of the file) in _____ of _____ trials, using _____ (the tool). Reported by _____.

VISUAL MOTOR AND WRITTEN OUTPUT
On _____ (date), given _____ (the task) and _____ minutes, produced _____ of _____ patterns on the line, copied shapes, words copied. The sample is kept _____.

SELF-CARE ROUTINE, BY STEPS
On _____ (date), across _____ sessions of the _____ routine, completed _____ of _____ steps without help (_____%). The steps with needing help were _____.

SENSORY, AS DESCRIBED BY THE TEAM
The team described _____ (what is observed, in observable words) during _____ on _____ (date). The supports already written into the IEP are _____. This line records what is in place; it does not recommend anything.

PT Physical Therapy Present Level Template

Mobility, transfers, stairs, endurance and access to the building and the playground, each with the distance, the time or the count as it was recorded.

STUDENT AND GRADE	PROVIDER AND ROLE	DATES OF THE DATA USED

MOBILITY, AS RECORDED
On _____ (date), _____ moved _____ feet in _____ (setting) in about _____ seconds, using _____ (the equipment, as the IEP names it), with _____ (the help recorded).

TRANSFERS
On _____ (date), across _____ trials, completed _____ of _____ steps of the _____ transfer _____ (as recorded), from _____ to _____.

STAIRS
On _____ (date), _____ climbed _____ steps _____ (the pattern recorded), using _____ (a rail, one hand, none), in about _____ seconds, with _____.

ENDURANCE AND PACE WITH PEERS
During _____ (activity) on _____ kept up for _____ minutes of _____ and then _____ Rest was taken _____ times.

TOOL From Data to Sentence

Sight rows. Fill the first three columns from page 5 and the fourth column is the sentence that goes in the district form.

STUDENT	PROVIDER AND ROLE	DRAFTED ON

MEASURE OR SOURCE FROM PAGE 5	THE NUMBER, AS REPORTED	DATE	THE SENTENCE AS IT WILL APPEAR IN THE SECTION

Before a single sentence is written: what data actually exists on this student, who reported it, and when. Twelve rows. A blank row is a finding, not a failure.

STUDENT

PROVIDER AND ROLE

INVENTORY COMPILED ON

KIND OF DATA	SOURCE, AND WHO REPORTED IT	DATE	WHAT IT SAYS, IN THE WORDS OF THE REPORT	GOES ON PAGE
Evaluation, as reported				
Evaluation, as reported				
Evaluation, as reported				
Probe or trial data				
Probe or trial data				
Observation in class				
Observation in class				
Work sample				
Attendance and minutes				
Family report				
Student report				
Teacher report				

Copy the words of the report, not your reading of them

Scores go in the column exactly as the evaluation worded them, with whoever reported them named beside the date. If the report gives a figure you would not use in a sentence, it still goes in the row; you can leave it out of the paragraph. Nothing on this page decides whether a number is high or low.

A blank row is a finding

If there is no current probe, no classroom observation and no family report, that is what the inventory shows, and the honest next step is to take one before the meeting rather than write a sentence without a date. Carry the rows you do have to page 15, one row per sentence, then to the template on pages 6 to 12.

Sounds in error by position, percent at word, sentence and conversation level, stimulability and intelligibility as they were reported, and what it does in class.

STUDENT AND GRADE

PROVIDER AND ROLE

DATES OF THE DATA USED

SOUNDS IN ERROR, AS MEASURED

On _____ (date), on _____ (the measure or probe, as it is named in the file), the sounds recorded in error were _____, in the _____ positions, as reported by _____.

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PERCENT AT EACH LEVEL

_____ produced _____ correctly in _____ of _____ words (_____%) on _____, in _____ of _____ sentences (_____%) on _____, and in _____ of _____ opportunities in a _____-minute conversation sample (_____%) on _____.

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STIMULABILITY, AS REPORTED

On _____ (date) _____ produced _____ correctly with _____ (a model, a cue, a mirror) in _____ of _____ trials. Leave this blank if no stimulability probe is on file.

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INTELLIGIBILITY, AS REPORTED

In _____ (setting), _____ was understood by _____ (a familiar or an unfamiliar listener) _____, as reported on _____ by _____. Listeners asked for a repeat _____ times in _____ minutes. Leave the rating blank if the file does not give one.

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EFFECT IN CLASS

During _____ (the activity), this looks like _____. The adult or the peer usually _____, and _____ then _____.

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THE NEED THAT FOLLOWS

_____ needs to _____ in order to _____ (what it gives access to, in this classroom).

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Occupational Therapy Present Level Template

Fine motor, visual motor and written output, a self-care routine as a percent of steps, and the sensory supports the team has already written down.

STUDENT AND GRADE

PROVIDER AND ROLE

DATES OF THE DATA USED

FINE MOTOR, AS MEASURED

On _____ (date, measure), _____ (grasp, in-hand manipulation, cutting, fastening, in the words of the file) in _____ of _____ trials, using _____ (the tool). Reported by _____.

VISUAL MOTOR AND WRITTEN OUTPUT

On _____ (date), given _____ (the task) and _____ minutes, _____ produced _____ of _____ (letters on the line, closed shapes, words copied). The sample is kept _____.

SELF-CARE ROUTINE, BY STEPS

On _____ (date), across _____ sessions of the _____ routine, _____ completed _____ of _____ steps without help (_____%). The steps still needing help were _____.

SENSORY, AS DESCRIBED BY THE TEAM

The team describes _____ (what is observed, in observable words) during _____, on _____ (dates). The supports already written into the IEP are _____. This line records what is in place; it does not recommend anything.

EFFECT IN CLASS

During _____, this looks like _____. Work is usually _____ (complete, partial, not started), and the adult _____.

THE NEED THAT FOLLOWS

_____ needs to _____ in order to _____.

Physical Therapy Present Level Template

Mobility, transfers, stairs, endurance and access to the building and the playground, each with the distance, the time or the count as it was recorded.

STUDENT AND GRADE

PROVIDER AND ROLE

DATES OF THE DATA USED

MOBILITY, AS RECORDED

On _____ (date), _____ moved _____ feet in _____ (setting) in about _____ seconds, using _____ (the equipment, as the IEP names it), with _____ (the help recorded).

TRANSFERS

On _____ (date), across _____ trials, _____ completed _____ of _____ steps of the _____ transfer _____ (as recorded), from _____ to _____.

STAIRS

On _____ (date), _____ climbed _____ steps _____ (the pattern recorded), using _____ (a rail, one hand, none), in about _____ seconds, with _____.

ENDURANCE AND PACE WITH PEERS

During _____ (activity) on _____, _____ kept up for _____ minutes of _____, and then _____. Rest was taken _____ times.

ACCESS TO THE BUILDING AND THE PLAYGROUND

_____ reaches _____ (the classroom, the cafeteria, the bus, the playground equipment) _____ (how, and with what), taking about _____ minutes against about _____ for the class, recorded on _____.

EFFECT IN CLASS, AND THE NEED THAT FOLLOWS

During _____, this looks like _____. _____ needs to _____ in order to _____.

Effect on Participation Frames

Fourteen frames that take a skill you measured and put it inside a real part of the school day. Pick the two or three periods this actually touches; delete the rest.

STUDENT

PERIODS OF THE DAY THIS ACTUALLY TOUCHES

MORNING MEETING OR CIRCLE

Because _____ (the measure, with the number and date), in a _____-minute morning meeting _____ takes _____ turns and _____; the teacher currently _____.

WHOLE-GROUP INSTRUCTION

When the class _____ (the task), _____, so about _____ of the _____ minutes are spent _____.

PARTNER AND SMALL-GROUP WORK

With one partner _____ (what changes, with the number); in a group of _____, _____.

INDEPENDENT SEAT WORK

_____ starts within _____ of the direction and stays with the task about _____ minutes before _____; the adult _____.

READING OR SPEAKING IN FRONT OF THE CLASS

Asked to _____ in front of the class, _____, recorded _____ of _____ times on _____.

ANSWERING A QUESTION THE TEACHER ASKS

_____ answers _____ of _____ questions _____ (how), and when the answer is not understood, _____.

WRITTEN WORK AND NOTE TAKING

In _____ minutes _____ produces _____, against about _____ for the class; the work is usually _____.

TRANSITIONS AND HALLWAYS

Moving between _____ and _____, _____ takes about _____ minutes, and _____.

LUNCH AND RECESS

At _____, _____ (what happens, with the count and the date), and _____ (what the adult does).

SPECIALS: ART, MUSIC, PHYSICAL EDUCATION

In _____, _____ (what the class requires) means _____, as observed on _____.

FIELD TRIPS, ASSEMBLIES, DRILLS

When the routine changes, _____; on _____ this looked like _____.

ARRIVAL, DISMISSAL, THE BUS

Getting _____, _____ needs _____, and takes about _____ minutes.

ASKING FOR HELP

_____ asks for help by _____, _____ times in _____ minutes on _____; when no adult is close, _____.

CHECK-INS AND PROGRESS MONITORING

On _____ (the check-in), _____ scored _____ when _____, and _____ when _____; the difference is _____.

Two or three periods, not fourteen

The sentence the team needs is not a survey of the day; it is the two or three places where the measured skill changes what happens. Name the period, name the task the period requires, give the number from page 5, and say what happens in the gap and what already helps.

EXAMPLE

A Speech Sound Present Level, Filled In

Amara is invented and so is every number. Notice that every figure in the paragraph came out of a row of the inventory above it, and that one inventory row is not used.

Data inventory (page 5) — Amara, first grade, invented student and invented data

KIND OF DATA	SOURCE	DATE	WHAT IT SAYS, IN THE WORDS OF THE REPORT	PAGE
Evaluation, as reported	Speech and language evaluation report	8/26	/s/ and /z/ in error in all positions; /r/ in error in the initial and medial positions	6
Evaluation, as reported	Same report, connected-speech sample	8/26	Intelligibility in connected speech rated 65 percent by the evaluator	6
Probe or trial data	Word-level probe, 20 words, SLP	9/8	/s/ correct in 12 of 20 words (60 percent)	6
Probe or trial data	Stimulability probe with a model, SLP	9/8	/s/ correct with a model in 8 of 10 trials	6
Probe or trial data	Sentence-level probe, 20 sentences, SLP	9/15	/s/ correct in 7 of 20 sentences (35 percent)	6
Observation in class	10-minute conversation sample, SLP	9/22	/s/ correct in 4 of 15 opportunities (27 percent)	6
Observation in class	Morning meeting, teacher and SLP together	9/29	Asked to repeat 5 times in a 15-minute meeting	14
Work sample	Recorded 2-minute retell, kept in the file	9/29	Listener asked for a repeat twice in the retell	14
Attendance and minutes	Service log, 9/1 to 9/30	9/30	6 of 8 scheduled sessions held; 2 missed for school events	—
Family report	Grandmother, by phone	9/12	Understood at home almost always; cousins ask her to repeat at the park	13
Student report	Amara, asked by the SLP	9/12	Does not like reading out loud because “they say what”	13

Speech sound present level (page 6), written from the rows above

Strengths and interests. Amara is easiest to understand when the listener is close to her and the topic is already known: her grandmother reported on 9/12 that she is understood at home almost always, and Amara said the same day that reading out loud is the part of the day she does not like because “they say what.”

Sound production, as measured. On 8/26 the evaluation reported /s/ and /z/ in error in all positions and /r/ in error in the initial and medial positions, and rated intelligibility in connected speech at 65 percent. On probes taken by the SLP since then, Amara produced /s/ correctly in 12 of 20 words on 9/8 (60 percent), in 7 of 20 sentences on 9/15 (35 percent), and in 4 of 15 opportunities in a 10-minute conversation sample on 9/22 (27 percent).

Stimulability, as reported. With a model, Amara produced /s/ correctly in 8 of 10 trials on 9/8.

Effect on participation. In a 15-minute morning meeting on 9/29 the teacher and the SLP counted 5 requests to repeat, and on a 2-minute retell recorded the same day a listener asked for a repeat twice. On both occasions Amara stopped her turn and did not finish it.

The need that follows. Amara needs to produce /s/ and /z/ in sentences and in conversation so that she can take a turn in morning meeting and read with a partner without stopping when a listener asks her to repeat.

How it checks

All 19 figures and dates in the paragraph appear in a row above; the percents are the counts (12 of 20 is 60, 7 of 20 is 35, 4 of 15 is 27). One row is not used — the service log — because minutes held and missed belong in the service section of the form. Nothing here names a label, calls a number low, or says what happens next.