



Occupational Therapy Rubric

Student: _____ D.O.B.: _____

Date: _____ School: _____ Grade: _____

Related Service(s): Occupational Therapy Physical Therapy

Student Profile	Points	Sources of Information and Additional Comments
Personal Care		
Mobility		
Gross Motor		
Fine Motor/Visual Motor		
Sensory Processing		

Total Points:	Completed By:	Date:
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According to 34 CFR 300.24, related services such as occupational and physical therapy are provided to assist the student with a disability to benefit from special education. The student's priority educational needs, goals and objectives identified on the IEP that require the support of an occupational therapist or physical therapist are:

Therapy Profile	Points	Sources of Information and Additional Comments
Number of Years Student Has Received Educationally Relevant Therapy		
Potential Responses to Educationally Relevant Therapy		
Student's Learning Environment		
Therapy Services to Be Provided to Student		
Support Services to Be Provided to School Staff/Parents		

Total Points:	Completed By:	Date:
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Student Profile

T H E R A P Y P R O F I L E		5-8	9-11	12-14	15-17	18-20
	18-20					
	15-17					
	12-14	▲▲▲▲▲▲				
	9-11	▲▲▲▲▲▲	▲▲▲▲▲▲			
	5-8	▲▲▲▲▲▲	▲▲▲▲▲▲			

The IEP team recommendation is:

The recommended Frequency of therapy is:

Occupational therapy is not indicated		▲	Not recommended
Physical therapy is not indicated			Periodic
Occupational therapy is indicated			Regular
Physical therapy is indicated			Intensive

Comments: _____

Recommendation for Therapy Services

Place an **X** on the horizontal axis to reflect the score on the Student Profile. Place an **X** on the vertical axis to reflect the score on the Therapy Profile. The point where the axes intersect indicates a recommended frequency of therapy.

 Therapist Signature

 Printed Name

Considerations for Educationally Relevant Therapy for Occupational Therapy and Physical Therapy

The *Considerations for Educationally Relevant Therapy (CERT)* tool has been developed to assist occupational therapists (OTs) and physical therapists (PTs) working in the educational environment in determining the need for educationally relevant therapy in the schools. This tool is not an evaluation or assessment instrument. It is a summary of educational considerations based on a review of student records, evaluations, observations, parent/teacher information, and other data.

According to 34 CFR 300.24, the role of a related service, such as occupational or physical therapy, is to enable the student to benefit from special education in order to receive a free appropriate public education (FAPE). The OT and/or PT along with the individualized educational program (IEP) team, determines the need for educationally relevant therapy.

The emphasis of school-based services provided by OTs and PTs has shifted over the years from a medical approach to an educational approach. The functional skills a student needs to perform in the educational setting are dependent on a variety of factors, including the student's diagnosis; present level of function; educational program; and overall developmental, cognitive, and academic abilities. Medical therapy concerns such as improving range of motion, strengthening, improving swallowing, or preventing contractures may affect a student's ability to accomplish the educational goals, *but are not the specific goals*. Likewise, sensory processing deficits, attention deficits, or physical impairments are not reasons, in themselves, to provide therapy services. The impairment must be linked to the student's inability to achieve educational goals and objectives on the IEP.

Therapy in the educational environment should be viewed as a continuum of services that encompasses a variety of service delivery models and intervention strategies. Research has shown that interventions embedded in class routines using functional life skills increase the achievement of IEP goals and motivation needed for participation in the general education curriculum. The knowledge and expertise of an OT and/or PT can be utilized to determine and design intervention strategies that can be integrated into a student's daily routine and implemented by school-based personnel. The student's needs may vary from year to year and are dependent on multiple factors, including the student's present level of performance, overall development, and educational program.

It is important to remember that the student must have a recognized disability or disorder which adversely affects his/her educational performance which includes developmental, academic and functional skills.

Directions for Completing the Consideration for Educationally Relevant Therapy Tool

The *Consideration for Educationally Relevant Therapy (CERT)* tool includes a **Summary Sheet**, a **Student Profile**, and a **Therapy Profile**. Information from the **Student Profile** and **Therapy Profile** is recorded on the **Summary Sheet** in the appropriate sections. This tool is completed at the IEP meeting with the relevant therapist(s), parents and other required members of the IEP team. The following is a description of each part of the tool.

The **Student Profile** describes student performance in five areas of school-related functions: Personal Care, Mobility, Gross Motor, Fine Motor/Visual Motor, and Sensory Processing. Within each area, there is a continuum based on student ability. The *Student Profile* is completed after a review of student records, evaluations, observations, parent/teacher information, and other data. The therapist should thoroughly read each paragraph before choosing the column that best describes the student's abilities and current level of support. A therapist interprets the descriptors within the context of the student's educational environment. The points from each of the five areas are recorded in the *Student Profile* section of the **Summary Sheet**. Specific evaluation tools should be noted in the *Sources of Information* and *Additional Comments* section. The date the Student Profile is completed should be recorded.

The **Therapy Profile** describes factors in five areas that commonly influence the effectiveness of therapy services. These areas include number of years the student has received educationally relevant therapy, the student's potential response to educationally relevant therapy, the student's learning environment, therapy services to be provided to the student, and support services to be provided to school staff and/or parents. The therapist should thoroughly read each column and, after collaborating with the IEP team, choose the column that best describes the student's learning environment, current level of support, and potential response to educationally relevant therapy. The points from each of the five areas are recorded in the *Therapy Profile* section of the **Summary Sheet**. The *Sources of Information* and *Additional Comments* section should include parent/teacher input and other information shared at the IEP team meeting.

The **Summary Sheet** includes information from the **Student Profile**, the student's priority educational needs, IEP goals and objectives, information from the **Therapy Profile**, and *Recommendation for Therapy*. All information should be completed at the IEP meeting by the school-based therapist. Based on the student's priority educational needs and goals/objectives, the IEP team should then determine if the expertise and intervention of an OT and/or PT is needed.

A recommended frequency of therapy can be derived by completing the grid at the bottom of the **Summary Sheet**. Place an X on the horizontal axis of the *Student Profile* that corresponds with the total points. Place an X on the vertical axis of the *Therapy Profile* that corresponds with the total points. The point where the axes intersect indicates a recommended frequency of therapy. The following descriptors are guidelines for the therapist to use in interpretation of the scoring grid.

Services are not indicated when the student is self-reliant and functional in the educational environment or the student's needs are addressed by classroom curriculum or other existing services (which may include total assistance by school staff).

Periodic Services may include documented environmental or equipment modifications and training and/or consultation with parents and/or school staff. Examples of frequency of therapy are one segment per month, two segments per grading period, thirty minutes per month, or once per semester.

Regular Services may include specific therapeutic strategies, environmental or equipment modifications, and training and/or collaboration with parents and/or school staff. Examples of frequency of therapy are two segments per month, one segment per week, or 30-45 minutes per week.

Intensive Services may include intensive therapeutic strategies, multiple environmental or equipment modifications, and training of parents and/or school staff. Examples of frequency of therapy are one to two segments per week or 45-60 minutes per week.

The IEP team proceeds with a *Recommendation for Therapy Services* on the **Summary Sheet**. Comments should be noted if the professional judgment of the therapist differs from the IEP team's recommendation.

If both an OT and PT have evaluated the student, each school-based therapist, based on his or her area of expertise, should complete all sections of the tool on separate forms.

Student Profile

Personal Care– management of personal needs and equipment within the educational environment

1	2	3	4
<p>Student demonstrates adequate dressing/undressing, hygiene, self-feeding skills, or oral motor skills with/without present equipment or devices.</p> <p>Student demonstrates adequate personal care skills using equipment/devices.</p> <p>**</p>	<p>Student requires supervision/prompts for dressing/undressing, hygiene, self-feeding, or oral motor skills.</p> <p>Student requires supervision/prompts to use personal care equipment/devices.</p>	<p>Student requires physical assistance or specific strategies for dressing/undressing, hygiene, self-feeding skills, or oral motor skills.</p> <p>Student requires multiple equipment/devices and needs physical assistance.</p>	<p>Student requires intensive training by therapist to facilitate emerging dressing/undressing, hygiene, self-feeding, or oral motor skills.</p> <p>Student requires multiple equipment/devices and needs intensive training by therapist in use of devices.</p>

Mobility– safe and adequate movement, (e.g., transfers, transitions between positions or locations, the ability to navigate architectural barriers) within the educational environment

1	2	3	4
<p>Student demonstrates adequate mobility with present equipment or devices.</p> <p>Student demonstrates adequate mobility without equipment or devices.</p> <p>Student demonstrates adequate transfer and transition skills.</p>	<p>Student uses equipment or devices for mobility with supervision/prompts.</p> <p>Student requires supervision/prompts for safe and adequate mobility.</p> <p>Student requires supervision/prompts to complete transitions/transfers.</p>	<p>Student requires physical assistance or specific strategies to use equipment for mobility.</p> <p>Student requires physical assistance or specific strategies for safe and adequate mobility.</p> <p>Student requires physical assistance or specific strategies to complete transitions/transfers.</p>	<p>Student requires intensive training by therapist in specific strategies for new equipment.</p> <p>Student requires intensive training by therapist to demonstrate emerging mobility skills.</p> <p>Student requires intensive training by therapist to demonstrate emerging transition/transfer skills.</p>

Fine Motor/Visual Motor– visual perception, visual motor, and fine motor skills needed to manipulate and manage materials within the educational environment

1	2	3	4
<p>Student demonstrates adequate visual perceptual and/or visual motor skills.</p> <p>Student can manipulate objects/tools/adaptive devices.</p> <p>**</p>	<p>Student requires supervision/prompts to perform visual perceptual and/or visual motor skills.</p> <p>Student requires supervision/prompts to manipulate objects/tools/adaptive devices.</p>	<p>Student requires physical assistance and/or specific strategies to perform visual perceptual and/or visual motor skills.</p> <p>Student requires physical assistance and/or specific strategies to manipulate objects/tools/adaptive devices.</p>	<p>Student requires intensive training by therapist to perform visual perceptual and/or visual motor skills.</p> <p>Student requires intensive training by therapist to demonstrate emerging manipulation of objects/tools/adaptive devices.</p>

Gross Motor– developmental motor skills, positioning equipment, and/or static/dynamic balance needed to participate within the educational environment

1	2	3	4
<p>Students can assume, maintain, or change positions, needed for participation.</p> <p>Student demonstrates adequate gross motor skills needed for participation.</p> <p>Student demonstrates adequate use of equipment/positioning devices for gross motor skills.</p> <p>**</p>	<p>Student requires supervision/ prompts to assume, maintain or change positions.</p> <p>Student requires supervision/ prompts to perform gross motor skills.</p> <p>Student requires supervision/prompts to use equipment/positioning device for gross motor skills</p>	<p>Student requires physical assistance and/or specific strategies to assume, maintain, or change positions.</p> <p>Student requires physical assistance or specific strategies to perform gross motor skills.</p> <p>Student requires physical assistance and/or specific strategies to use equipment/positioning devices for gross motor skills.</p>	<p>Student has emerging skills and requires intensive training by therapist to assume, maintain, or change positions.</p> <p>Student requires intensive training to perform gross motor skills.</p> <p>Student requires multiple trials of positioning equipment to access the educational environment.</p>

** Student’s needs are addressed through classroom curriculum or other existing services, which may include total assistance by school staff.

Sensory Processing– body awareness and sense of movement, sensory perception, exploration, and interaction with others during play and work activities within the educational environment.

1	2	3	4
<p>Student tolerates movement, touch, textures, sights, sounds and smells occurring in the educational environment. Student seeks appropriate sensory input.</p> <p>Student adequately uses suggested techniques for self regulation.</p> <p>Student is able to make choices, organize, motor plan, and initiate tasks.</p> <p>**</p>	<p>Student requires supervision/prompts to tolerate touch, textures, sights, sounds and smells or to seek appropriate sensory input.</p> <p>Student requires supervision/prompts to utilize suggested techniques for adequate self regulation.</p> <p>Student requires supervision/prompts to make choices, organize, motor plan and initiate tasks.</p>	<p>Student requires physical assistance and/or specific strategies to tolerate touch, textures, sights, sounds and smells or to seek appropriate sensory input.</p> <p>Student requires physical assistance and/or specific strategies to utilize suggested techniques for adequate self regulation.</p> <p>Student requires physical assistance and/or specific strategies to make choices, organize, motor plan and initiate tasks.</p>	<p>Student requires intensive interventions by therapist to tolerate touch, textures, sights, sounds and smells or to seek appropriate sensory input.</p> <p>Student requires intensive training by therapist to use suggested techniques for adequate self regulation.</p> <p>Student requires intensive training by therapist and/or specific strategies to make choices, organize, motor plan and initiate tasks.</p>

Therapy Profile

Number of Years Student Has Received Educationally Relevant Therapy

1	2	3	4
More than 8 years of therapy	5 to 8 years of therapy	3 to 5 years of therapy	Less than 3 years of therapy

Potential Response to Educationally Relevant Therapy

1	2	3	4
Student is expected to function in the educational environment without therapy services.	Student is expected to maintain current level of performance with periodic therapy services in the educational environment.	Student is expected to make progress toward educational goals with therapy services.	Student is expected to make significant progress toward educational goals for therapy services.

Student's Learning Environment

1	2	3	4
Student is able to access the learning environment with/ without use of compensatory skills or modifications.	Periodic review or modifications of the student's learning environment, including community-based instruction sites, is necessary.	Review or modification of the student's learning environment, including community-based instruction sites, is necessary.	Extensive review or modification of the student's learning environment, including community-based instruction sites, is necessary.

Therapy Services to Be Provided to Student

1	2	3	4
<p>Student does not require intervention by the therapist once suggested modifications are in place.</p> <p>Student does not require intervention by the therapist to access and benefit from special education.</p>	Student requires periodic support from the therapist with regular support from staff and parents to benefit from special education.	Student requires regular support from the therapist to benefit from special education	Student requires extensive support from the therapist to benefit from special education as student's educational needs are frequently changing.

Support Services to Be Provided to School Staff and/or Parents

1	2	3	4
Staff/parents do not require therapist involvement to establish a program and select adaptive equipment, techniques, or routines.	Staff/parents require periodic therapist involvement and/or training to establish a program and select adaptive equipment, techniques, or routines.	Staff/parents regular therapist involvement and/or training to establish a program and select adaptive equipment, techniques, or routines.	Staff/parents intensive therapist involvement and/or training to establish a program and select adaptive equipment, techniques, or routines.