



# NURSING APPRAISAL AND ASSESSMENT OF STUDENTS WITH SPECIAL HEALTH CARE NEEDS

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## FOREWORD

There is a strong relationship between academic achievement and a child's physical, emotional, and mental health. This link is the foundation for providing school health services as an important component of a school program. School health services provide primary prevention aimed at keeping students in schools through appropriate screenings; early identification of children at risk for physical, emotional and mental health concerns; and case management of students with chronic health concerns.

The Maryland Code Annotated, Education § 7-401 (Md. Code Ann., Educ. § 7-401) requires the Maryland State Department of Education (MSDE) and the Maryland Department of Health (MDH) to jointly develop public standards and guidelines for school health programs. The following guidelines were developed in accordance with that requirement and are based on the expressed needs of the local school health services programs. The guidelines developed under Md. Code Ann., Educ. § 7-401 contain recommendations for minimum standards of care and current best practices for the health service topics addressed. It is intended that these guidelines will be used by the local education agencies (LEAs) in developing policies and procedures to assist local school health services programs in providing consistent and safe care to the students of Maryland. Specific laws and regulations that direct school nursing practice or other health services are identified in the guidelines.

To implement these guidelines, LEAs and local health departments should consult with MSDE and MDH who will:

- Assist and provide technical assistance to local school health programs to support their efforts to plan for students with special health needs;
- Provide training to all appropriate school staff regarding issues related to students with special health needs including, but not limited to, planning, maintaining a safe environment, and medication administration issues; and
- Monitor the implementation of school health services programs including, but not limited to, programs and policies related to students with special health needs.

# SECTION I: INTRODUCTION

## PURPOSE

The purpose of this guideline is to:

1. Provide guidance to school health services program staff for the management and coordination of care of students with special health care needs;
2. Define the roles and responsibilities of school health services staff, school administrators, other school staff, parents/guardians, and students in the planning, care, and education required to support a student with special health care needs.

## LEGAL AUTHORITY

The Code of Maryland Regulations (COMAR) 13A.05.05.05-.15 *School Health Services Standards* sets forth the school health services standards including the health appraisal process to be used by a designated school health professional to determine if a student has a health problem which may impede learning or require special care, or both. In most Maryland public school health services programs, the designated health care professional is a registered nurse; hereinafter referred to as the school nurse.

The Maryland Board of Nursing (MBON) delineates the standards of practice for registered nurses and the legal parameters in the Nurse Practice Act (NPA) as stated in COMAR 10.27.09 *Standards of Practice for Registered Nurses*. In accordance with COMAR 13A.05.05.08 *School Health Services Standards- For All Students with Special Health Needs*, the development of a nursing care plan for routine and emergency care will need to be prepared for a student with special health care needs that may require particular attention during the school day.

School health services programs should follow the Family Educational Rights and Privacy Act (FERPA) and local policies regarding release of records and information sharing, and maintain confidentiality when performing the nursing appraisal, assessment, and health care planning.

## DEFINITION

Children and youth with special health care needs (CYSHCN) are defined as “those who have or are at increased risk for chronic physical, developmental, behavioral, or emotional conditions. They also require health and related services of a type or amount beyond that required by children generally” (McPherson et al., 1998). Students with a special health care need may require medical management, health care intervention, and/or the use of specialized services or programs for their disability or chronic condition. These students may require a thorough nursing appraisal and/or assessment to determine the need for the development of an individualized health care plan (IHP) and/or emergency action plan (EAP).

## SECTION II: MANAGEMENT OF STUDENTS WITH SPECIAL HEALTH CARE NEEDS

### HEALTH APPRAISAL

School management of students with special health care needs is individualized and begins with a health appraisal. The health appraisal should consider the medical, educational, and social issues impacting the student. Information may be collected during a review of the student's medical and educational records (e.g., the school health record, the student record card, school emergency health card), interviews with the student and/or parent/guardian, and information obtained from the previous school nurse.

The health appraisal of students with identified health conditions shall be repeated as frequently as deemed necessary by the designated school health services professional (COMAR 13A.05.05.07C(2)). It is recommended that the health appraisal be completed at least annually unless the condition is resolved as documented by the student's health care provider and there is no indication that the student needs nursing services during the school day. The health appraisal documentation can range from narrative notes to local school health service program appraisal forms. Data from the health appraisal and nursing judgment regarding the level of care required to manage the health condition in school will determine the need for a nursing assessment.

### ASSESSMENT

A written assessment, using the local program's standard assessment procedures and the procedures outlined in this guideline, should include data and relevant information that may affect the health management and safety of the student. A thorough nursing assessment should consider the student's individualized needs and reasonable accommodations which may be required at school. The final nursing assessment should be placed in the student's health record.

### COMPONENTS OF A NURSING ASSESSMENT FOR A STUDENT WITH SPECIAL HEALTH CARE NEEDS

1. Identifying information/contact information
  - Name of parent/guardian, address, phone number, and emergency contacts; Student's date of birth (DOB) and grade; Primary care provider's name and phone number; Name and phone number of health care specialist(s), as necessary.
2. Medical history
  - Birth history;
  - Health and developmental history;
  - Current diagnosed health condition, including date of diagnosis and progress of disease process;
  - Family history of specific disease;
  - History of health emergencies/hospitalizations;
  - Allergies;
  - Immunizations;
  - Other chronic health condition(s).

### 3. Current health status

- Current medication and treatment orders (routine and as needed);
- Frequency/pattern of health condition signs and symptoms demonstrated by the student;
- Precipitating factors;
- Limitation of activities;
- Management and treatment for exacerbations (e.g., profile of typical emergency, plan including administration of emergency medications and the indication for their use);
- Typical response to interventions;
- Equipment needs;
- Absences related to health condition(s).

### 4. Self-management

- Student's understanding of health condition(s) and health care management;
- Level of independence with management plan, including ability to self-carry and self-administer medication in accordance with Md. Code Ann., Educ. § 7-421;
- Student's understanding and demonstration of medication administration technique, if applicable;
- Student goals for independence;
- Interactions with peers and teachers in the past related to health condition health care management;
- Interventions to be implemented in case of an emergency.

### 5. Psychosocial considerations

- Family status and available supports;
- Parent/guardian's understanding of the health condition(s);
- Ability of student and family/caregiver to manage the student's health condition(s);
- Cultural considerations;
- Language barrier, interpreter services;
- Health insurance needs and other additional resources;
- Stressors and access barriers (e.g., education, insurance, financial, supplies).

### 6. Educational planning

- Grade level;
- Academic performance;
- Educational accommodations or information necessary for revision/development of Section 504 or Individualized Educational Program (IEP), as necessary;
- Participation in special programs (e.g., vocational or work-study);
- Participation in school sponsored after-school activities and field trips;

- Transportation type and needs (e.g., length of bus ride or walk, access to emergency medications or supplies);
  - Adaptations to physical education class;
  - Concurrent or intermittent home and hospital instruction;
  - Change in school placement.
7. Physical assessment/Review of systems
- Assessment should be documented per local school health services program guidelines.

## PLANNING

It is important that the student's parent/guardian and licensed health care provider are aware of the school health services guidelines and the recommendations for minimum standards of care and current best practices. The parent/guardian, licensed health care provider, and school nurse should collaborate to develop and implement an IHP and/or EAP that address concerns, expectations, developmental considerations, and educational accommodations.

The school nurse should provide a copy of the plan(s) to the student's parent/guardian and the licensed health care provider as appropriate and place the original in the student's health record. It is the responsibility of the school nurse to review the document(s) at least annually and update as needed to reflect changes in the student's health care needs, nursing interventions, and/or student outcomes.

### Individualized Health Care Plan (IHP)

Following completion of the nursing assessment, the school nurse will determine the need to develop an IHP. The IHP is used to document the nursing process in the school setting including the nursing assessment, nursing diagnoses, student goals, nursing interventions, desired student outcomes, and evaluation of student response and nursing care. The IHP should facilitate the management of the health condition to optimize learning and provide a written record outlining the student-specific nursing care and interventions for a student whose health care needs require more complex school nursing services.

Priority for IHP development must be given to those students whose health care needs may affect safe and optimal school attendance and academic performance, students who require daily or significant health services at school, and/or students with health conditions addressed in a Section 504 or IEP.

It may be necessary to inform appropriate school personnel regarding the student's health care need(s) and other considerations in the school setting. The school nurse should consider the following when developing the IHP:

- Student's developmental age and ability to participate in management plan;
- Existing or potential barriers to plan for (e.g., compliance, developmental or behavioral issues);
- Medication administration, including ability to self-carry and self-administer medication in accordance with Md. Code Ann., Educ. § 7-421;
- Storage of medication and/or equipment (e.g., student's ability to self-carry, storage in multiple locations);
- Educational needs and accommodations (e.g., alternative arrangements in physical education, sports, and technology education);



- Student schedule, field trips, and other school-sponsored activities;
- Specific limitations for physical activities;
- Allergies or food restrictions;
- Type of transportation to and from school;
- Use of medical alert identification (e.g., bracelet or necklace);
- Coordination with other team members including health care providers and other school services providers;
- Emergency care including provisions for a student in distress (e.g., adult escort to the office/health room, contacting the parent/guardian and licensed health care provider, and determination of the appropriate personnel/staff and responsibilities); and
- Implementation of EAP (see below).

### Emergency Action Plan

Based on the nursing assessment and the licensed health care provider orders, the school nurse may need to develop an EAP for a student with special health care needs. The EAP may be sufficient without the development of an IHP based on the nursing assessment. The EAP should provide instruction to school personnel working directly with the student to address the student's health care needs and appropriate response to the student's emergent health issue.

Training must be provided to school personnel regarding the student's EAP including the location of medication, plan for administration, and process for notification of the school nurse in the event emergency medication is needed. School personnel trained by the school nurse can administer emergency medication in accordance with the student's EAP and licensed health care provider orders. The act of authorizing an unlicensed individual to administer emergency medication in the event of a medical emergency is based on the school nurse's judgment and criteria for delegation in the Maryland Nurse Practice Act (Annotated Code of Maryland, Health Occupations Article, Title 8; COMAR 10.27.11.) Refer also to the *Maryland State School Health Services Guideline: Administration of Medication in Schools*.

Local school health services programs should have written procedures and protocols for emergency planning, including school personnel's immediate access to the EAP and steps to take if the student's parent/guardian has not provided emergency medication. The EAP should include, but not be limited to:

- Emergency contact information;
- Student's signs and symptoms of emergency;
- The licensed health care provider's emergency orders and interventions;
- Storage and accessibility of emergency medication/supplies/equipment to allow immediate availability to designated school personnel;
- Student-specific indication for use and administration of emergency medication;
- Procedure to call 911; and
- Guidance for when a school nurse is not available.

To facilitate immediate response to the student and access to emergency medication, the school nurse should also consider the following when developing the EAP:

- Size and layout of school building;
- Health services staffing model;
- Plan for access to additional treatment interventions (e.g., medication, snacks, water); and
- Plan for students who self-manage to securely self-carry emergency supplies for immediate access (e.g., fanny pack).

## EVALUATION

The school nurse will assess and evaluate the student's health status and response to their health care plan(s) (IHP and/or EAP) on an ongoing basis. Plans should be reviewed at least annually and updated as necessary to reflect changes in the student's health care needs, nursing interventions, and goals. The school nurse will evaluate the school-wide awareness and education pertinent to the health and safety of students with special health care needs.

## SECTION III: CARE COORDINATION AND CASE MANAGEMENT

### ROLES AND RESPONSIBILITIES

Effective case management requires coordination between all persons involved in the care of the student. The school nurse is often the case manager for students with special health care needs and can serve as the liaison for all persons involved in the student's care. Another student services staff member or IEP or 504 team member may be designated as the educational case manager.

In accordance with the Md. Code Ann., Educ. § 7-426, the student, parent/guardian, and school will have specific responsibilities integral to the health and safety of the student.

### PARENT/GUARDIAN RESPONSIBILITIES

School nurses should seek to fully involve the student's parent/guardian and work collaboratively to plan and provide for the student's care. The parent/guardian shall:

- Provide accurate emergency contact information;
- Provide complete and accurate medical information related to the student's special health care need, including written documentation of the student's health condition and medication/treatment orders from the licensed health care provider;
- Collaborate with the school nurse to develop the plan of care for the student with special health care needs;
- Supply and maintain the appropriate medication, equipment, and supplies required for the care of the student with the appropriate written treatment and/or medication orders; and
- Provide the medical identification bracelet/necklace identifying the health condition if indicated.

### STUDENT RESPONSIBILITIES

Student participation in planning and health management responsibilities must be age, condition, and developmentally appropriate. The student shall:

- Inform school staff immediately in the event of a health emergency, if able to do so;
- Responsibly self-carry and self-administer medication when appropriate and in accordance with Md. Code Ann., Educ. § 7-421; and
- Participate in planning of care.

## SCHOOL ADMINISTRATOR RESPONSIBILITIES

The school administrator must be aware of students with special health care needs as documented by a health care provider and work with the school nurse to support the effective implementation of health plans. Implementation of the IHP and/or EAP includes supporting reasonable accommodations based on the school nurse's assessment, healthcare provider orders, and the unique needs of each student.

The school administrator supports the school nurse's training, education, and awareness activities, which include, but are not limited to:

- Recognizing the school nurse as the leader and health expert of the school health services program;
- Working collaboratively with school health services staff to provide staff training;
- Planning for implementation of student EAP including during field-trips and school-sponsored events;
- Providing outreach and education for parents/guardians and the general school community; and
- Supporting the school nurse in regard to adherence to the parent/guardian responsibilities.

## SCHOOL STAFF RESPONSIBILITIES

Based on the needs of the individual student, school nurses should train and document training of all school staff involved in the implementation of a student's health care provider orders or EAP. Other school staff contributing to the management of students with special health care needs include the following:

*Transportation personnel:* Respond to the student's EAP as instructed and/or trained by the school nurse; communicate problems or concerns to the transportation office, school nurse, and school administrator, as instructed or trained.

*Coaches, athletic trainers, and advisors for school-sponsored activities:* Respond to the student's EAP as instructed and/or trained by the school nurse; communicate to the school nurse those students with special health care needs indicated on a pre-participation sports physical; communicate problems or concerns to school nurse and school administrator as instructed or trained.

*School registered dietician and food services staff:* Read and understand all pertinent health care information provided by the school nurse regarding the student's health care management related to the student's meal plan; make meal substitutions or modifications for school meals according to United States Department of Agriculture requirements; assist with dietary accommodations as necessary; communicate ingredient list and menu choices with school nurse as appropriate; and maintain accurate and current nutritional analysis and share with the school nurse.

*School counselor:* Participate in disability awareness activities, assist with support groups/counseling; assist with educational planning (e.g., Section 504 or IEP).

*Pupil personnel worker/school social worker:* Assist the school nurse working with families to address transportation concerns, home teaching, and attendance issues.

*School psychologist:* Assist students with psychological support for coping, adjustment, and any behavioral strategies to support the student.

*Teachers (including substitute teachers), paraeducators and personal assistants:* Respond to the student's EAP as instructed and/or trained by the school nurse; maintain and review substitute folder; be aware of classroom needs (e.g., routine and emergency care); and communicate problems or concerns to the school nurse and school administrator as instructed or trained.

### **SCHOOL-SPONSORED ACTIVITIES**

School personnel should provide sufficient notice to the school nurse when a school-sponsored activity is planned. A plan will need to be developed by the school nurse, in collaboration with the school administrator, parent/guardian, and student. Refer also to the *Maryland State School Health Services Guideline: Administration of Medication in Schools* addressing the administration of medication during school-sponsored activities. Prior to the school-sponsored activity, the school nurse should verify that the school personnel in charge has a copy of a student's EAP and has been trained to implement and respond to the plan.

### **PARENT/GUARDIAN OUTREACH**

School nurses should provide the parent/guardian with information regarding resources. The school nurse can also refer the student and/or parent/caregiver for counseling, support, and additional resources.

In accordance with Md. Code Ann., Educ. § 7-426, the school is also responsible for providing outreach and education for parents/guardians and other caregivers regarding emergency care of students with special health care needs.

## SECTION IV: GLOSSARY

**Accommodations:** Individualized changes or adjustments in a school setting that provide a student with a disability equal opportunity to participate in school programs and activities.

**Delegation:** The act of authorizing an unlicensed individual, a certified nursing assistant, or a medication technician to perform acts of registered nursing or licensed practical nursing (COMAR 10.27.11.02(B)(6)).

**Designated School Health Services Professional:** A health care provider, certified nurse practitioner, or registered nurse, or all of these, with experience or special training, or both, in working with children and families in community or school health programs and practices in accordance with the current medical and nursing standards of care.

**Emergency Action Plan (EAP):** A document that specifies the actions needed to manage a student's specific medical condition in the event of a medical emergency.

**Family Educational Rights and Privacy Act (FERPA):** (20 U.S.C. § 1232g; 34 CFR Part 99) A federal law that protects the privacy of student education records. The law applies to schools receiving federal funds under an applicable program of the U.S. Department of Education. FERPA gives parents certain rights with respect to their student's education records and these rights transfer to the student when the student reaches age 18 or attends a school beyond the high school level. FERPA permits school officials to disclose, without consent, education records, or personally identifiable information from education records to appropriate parties in connection with an emergency, if knowledge of that information is necessary to protect the health or safety of the student or other individuals (e.g., on a need-to-know basis).

**Health Appraisal:** The process by which a designated school health services professional identifies health problems that may interfere with learning. These may include health observations, interviews, and conferences with parents/guardians, students, educators, and other health professionals.

**Healthcare Provider:** An authorized prescriber. A physician, nurse practitioner, certified midwife, podiatrist, physician's assistant, or dentist.

**Individualized Education Program (IEP):** A written document required under the Individuals with Disabilities Education Improvement Act (IDEA) for students with disabilities that outlines their need for special education and related services.

**Individualized Health Care Plan (IHP):** A type of nursing care plan developed by the school nurse utilizing data from a nursing appraisal/assessment. It is specific for a student with a chronic health condition and designed to meet the student's unique health care needs.

**Medication Administration:** A term used to describe a nursing process that incorporates the application of knowledge of a product/medication; its interaction with other products/medications; as well as the duty to educate the person/patient on the use, effects, side effects and indications for the use of a product/medication.

**Nursing Assessment:** The act of gathering and identifying data that assists the nurse, the client (e.g., student in the school setting), and the client's parent/caregiver to identify the client's health concerns and needs. (Maryland Nurse Practice Act, Maryland Code Annotated, Health Occupations Article, Title 8; COMAR Title 10, Subtitle 27).

**Nurse Practice Act:** A statute enacted by the legislature of any state or by the appropriate officers of the district that delineates the legal scope of the practice of nursing within the geographical boundaries of the jurisdiction. The Maryland Nurse Practice Act is codified in the Maryland Code Annotated, Health Occupations Article, Title 8. The accompanying regulations are found in the Code of Maryland Regulations Title 10, Subtitle 27.

**School Nurse:** A registered professional nurse currently licensed by the Maryland Board of Nursing who works in a school setting.

**Section 504 Plan:** An education plan developed by a school team for a student with a disability in accordance with Section 504 of the Rehabilitation Act of 1973 and 34 C.F.R. Part 104 that specifies services designed to meet the student's individual educational needs so the student can access a free and appropriate public education (FAPE).

**Self-Administration/Self-Administer:** The application or consumption of medication by an individual in a manner directed by the health practitioner without additional assistance or direction (Md. Code Ann., Educ. § 7-421).

**Self-Carry:** The possession of a medication on an individual's person to allow quick access to and administration of the medication and to allow self-administration when specified.

**School-Sponsored Activities:** Academic and non-academic school programs and activities at schools that receive federal financial assistance and are therefore subject to Section 504 of the Rehabilitation Act of 1973 (see 34 C.F.R. Part 104). These activities are those the student attends as a participant and not those attended as an observer.

**Special Health Care Needs:** A chronic physical, developmental, behavioral, or emotional condition(s) that may require health and related services of a type or amount beyond that required by children generally. A special health care need may require medical management, health care intervention, and/or the use of specialized services or programs for a disability or chronic condition.

**Unlicensed Individual:** An individual who is not licensed or certified to provide nursing care under Health Occupations Article, Title 8, Annotated Code of Maryland (COMAR 10.27.11.02B(24)).

## SECTION V: RESOURCES AND REFERENCES

### RESOURCES

#### Centers for Disease Control and Prevention (CDC)

<https://www.cdc.gov/healthyschools/healthconditions.htm>

CDC Healthy Schools offers a “Managing Health Conditions” section dedicated to students with chronic health conditions, school nurses and other health care providers that are involved in the daily management and care coordination of students with special health care needs.

#### Health Resources and Services Administration (HRSA)

<https://mchb.hrsa.gov/programs-impact/focus-areas/children-youth-special-health-care-needs-cyshcn>

The HRSA Maternal and Child Health Bureau supports children and youth with special health care needs.

#### Maryland Department of Health

<https://health.maryland.gov/phpa/genetics/Pages/home.aspx>

The Office for Genetics and People with Special Health Care Needs promotes family centered, community based, culturally competent, and coordinated care for children and youth with special health care needs.

#### The Parents' Place of Maryland

<https://www.ppmmd.org/>

A grass-roots effort of families, professionals, and community leaders determined to provide resources, support, and information to parents of children with disabilities and special health care needs.



## REFERENCES

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