

# QUICK REFERENCE GUIDE Documentation of School Nurse’s Evaluation for an Individualized Education Plan (IEP)



**Call your Local District Nursing Services Office for assistance OR  
District Nursing Services-Roybal Annex (213) 202-7580**

Review Policy and Procedures:

- (1) **BUL-2030.1**, Guidelines for an Individualized Health Assessment and the Participation of the Credentialed School Nurse in the Individualized Education Plan (IEP) Process
- (2) **BUL-6639.0 Three-Year Review**. Page 6 of 6 states that both health and academic assessment plans are required for all triennials

Nursing IEP Evaluations have 3 parts: (1) Health Screening (2) Office Visit (3) IEP document (Present Level of Performance, PLOP, Summary).

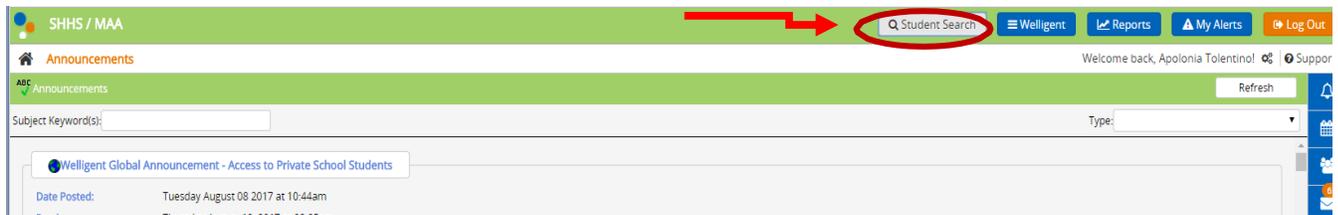
### INSTRUCTIONS:

1. Check **Health Screening** first. Before creating an Office Visit for a **Health Assessment** or **Record Review**, you **MUST** check if student has **Screenings** within one year (height, weight, dental, vision, audio). Perform screenings (Vision) and/or Hearing (Audiometry) as needed.  
\*\*\*The Individual Student Health Screening results information **MUST** be documented first before completing the Health Assessment form. This step is necessary for the screening results to prepopulate the screening fields in the Health Assessment.
2. **The Office Visits** entry is dependent on the type of IEP that is in-process, check **IEP Event Listing** from the **Record Navigator**. Refer to the *SPED (Nursing) guidelines for Health Assessment for the different types of IEP evaluations*.
3. **IEP Event Listing**; Check the **Status** column, with the IEP In-Process, click under Action column and then go to the Document Tab, Section E. Click the green plus to start a new page.

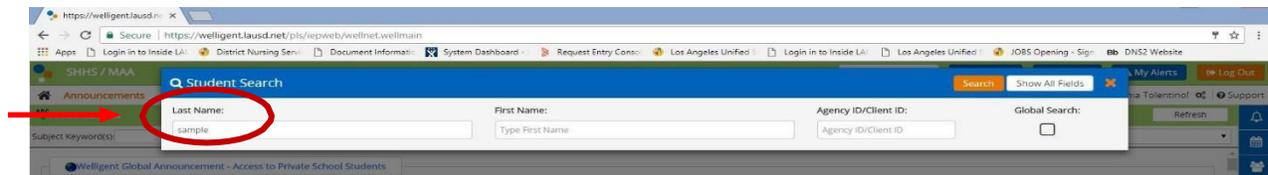
### Detailed Instructions:

#### 1. SCREENING (Health screening):

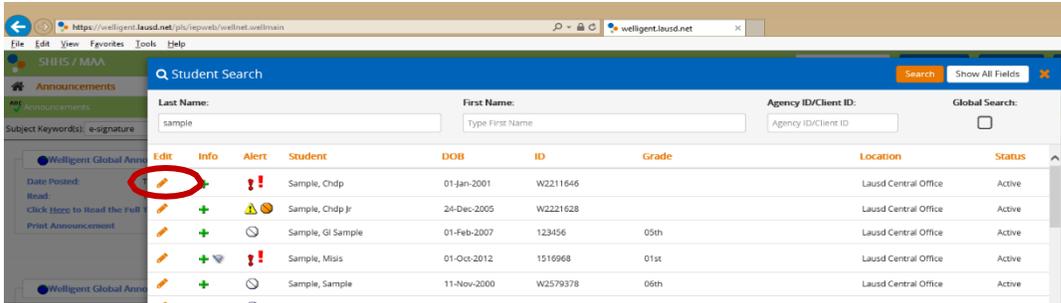
➤ Click on the **Student Search** window



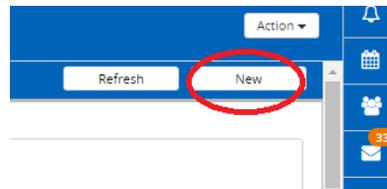
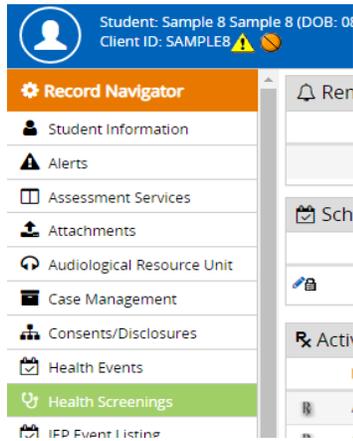
Enter the student’s name, **Last Name** then **First Name** and verify the **school location**. Click **Search**



Once you find the student, **click** on the Edit icon, and the Record Navigator screen will open

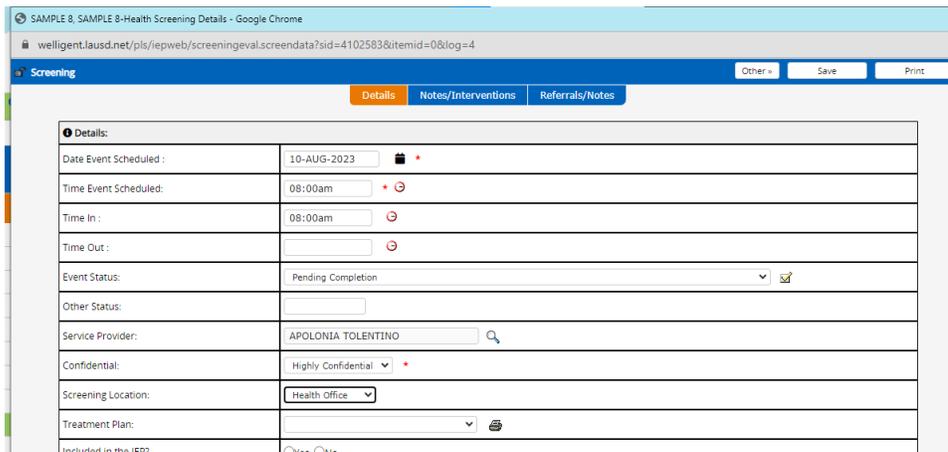


From the **Record Navigator**, **click** on the **Health Screenings** link. It will be highlighted in orange. Check the Health Screenings history, use the vision and the hearing screenings recorded within one calendar year. If there is no recorded vision and/or hearing screenings, perform vision and request for hearing screening. To document the vision screening, click on the **New** button



The Screenings Details page will appear. Notice the 3 tabs at the top. The **Appointment Details** tab is your current view.

- The **Date Event Scheduled** is defaulted to display the current date. To change this date, simply click on the Welligent Date Picker and select the correct date.
- **Click** in the **Time Event Scheduled** field and enter the time of the scheduled event. Be sure to use the correct time format, (hh:mm am/pm; i.e. 09:30am) or the record will not be saved. The colon pre-fills. Notice there's no space between the minutes and am or pm.
- Click **Time In** to type the correct time. **Click** on the **clock icon** to the right of the field and the current time will populate. (Note: your computer must have the correct time).
- **Skip Event Status** field at this time until after the vision screening results have been completed. This is the second to the last step in completing the health screening documentation. The last one is the E-Signature (SSO password)



- The **Service Provider** field is prepopulated with the name signed in to Welligent.
- The **Confidential Status** field prefills to **Highly Confidential**. **Click Save**.
- Next, with the Screening Navigator field still open, the Screening Areas on the right side of the page needs to be completed
- **Click on the Vision Screening link**

\*\*\*Screen for Distance and Near vision. If needed, Color Vision.

➤ **Documentation of Vision Screening Results**

a. **Distance vision screening**

The drop-down **Results**: indicates **Distance** vision screening result.

- a. **Passed Screening**: Document Right Eye, Left Eye. Use **Pass** or **Fail** on the appropriate column (1<sup>st</sup> Uncorrected and/or 2<sup>nd</sup> Corrected Vision). Complete appropriate fields.
- b. **Failed Initial Screening**: From the **Results** field, select **Failed Initial Screening** from the dropdown list. Document Right Eye, Left Eye. Use **Fail** on the on the appropriate column (1<sup>st</sup> Uncorrected and/or 2<sup>nd</sup> Corrected Vision). Complete appropriate fields.
- c. **Unable to Condition**: check box to indicate that the screening was completed due to several reasons secondary to the student’s ability to follow directions.

b. **Near vision screening: per CA guidelines**, screen both eyes.

Document using the 3<sup>rd</sup> column (Uncorrected Near Vision) and/or 4<sup>th</sup> column (Corrected Near Vision)

c. **Color vision screening**: Document using the last column

- ✓ **Complete the Screening Notes**, i.e. a referral has been made and a health note sent
- ✓ Click **Details** (the first option on the **Screening Navigator**). Click on **Referrals/Notes** then click the second green plus sign on the right under **New**.
- ✓ Select **Vision Screening** report.
  - The pre-filled vision screening follow-up letter will appear defaults to the current date. The date may be changed by typing inside the date field
  - Click **Save**; Click **Print** to preview; Click **Print** again. The printer dialogue screen will appear. Click print one more time.

- If other screenings like Height/Weight were done during the same session, click the appropriate screening type from the Screening Navigator to document.

- Click Details to mark the health screening entry **Completed and E-Sign**

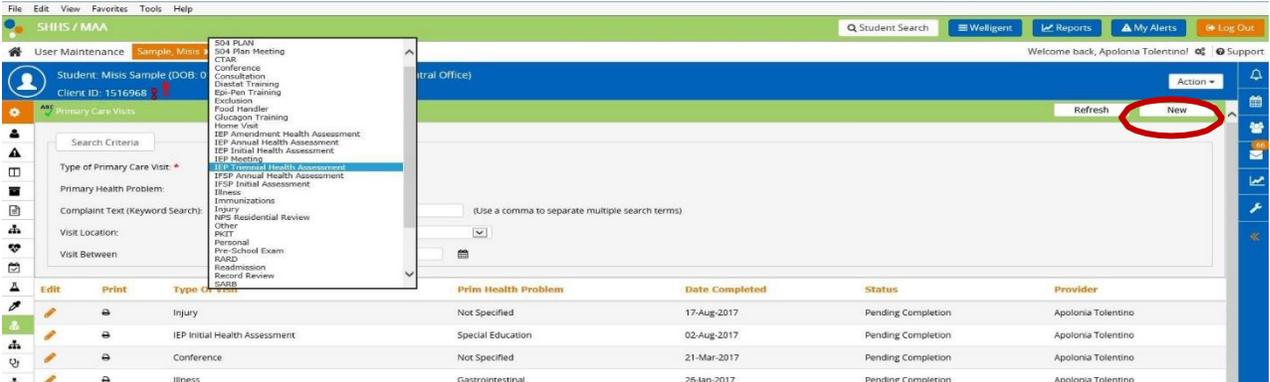
➤ Click **Health Screenings** to return to the **Record Navigator**.

**2. HEALTH ASSESSMENT (OFFICE VISIT)**

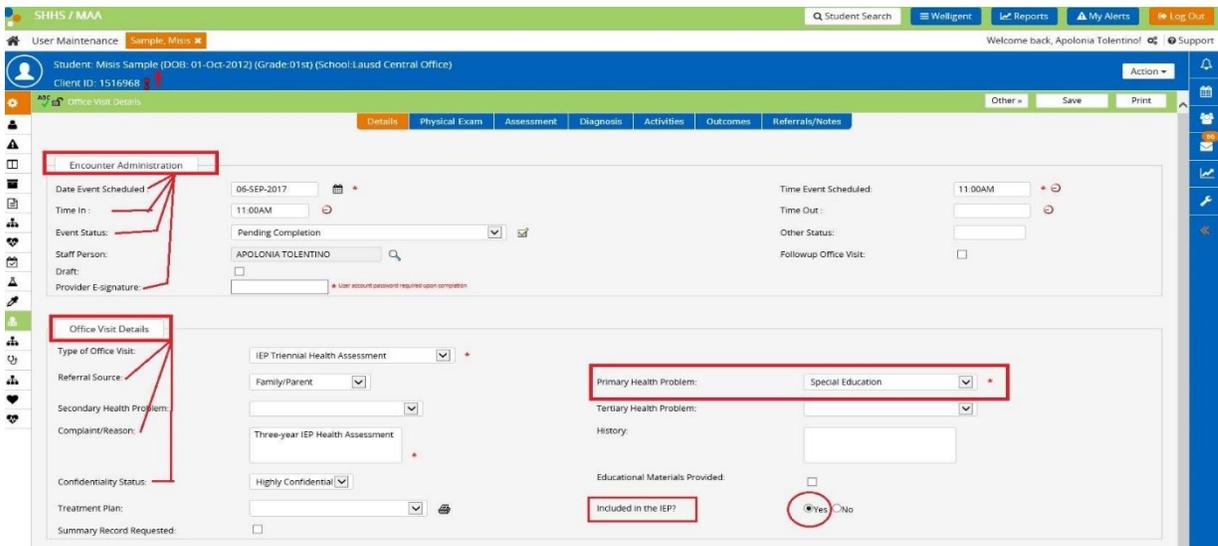
- With the Student Record still open, click on the **Office Visits** link from the **Record Navigator**
- From the **Search Criteria**, select the **Type of Primary Care Visit**, Select the appropriate type of IEP (IEP Initial Health Assessment, IEP Annual Health Assessment, IEP Amendment Health Assessment, IEP Triennial Health Assessment) and then click **NEW**.

**a. Complete the Encounter Administration section.**

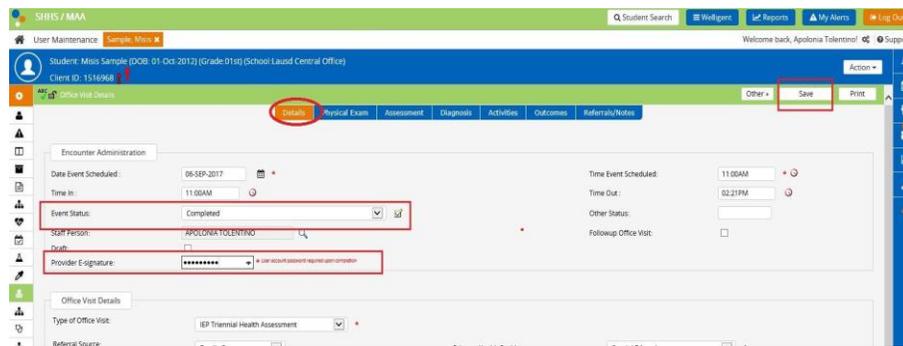
- **Date Event Scheduled:** defaults to current date. Use date picker to enter correct date.



- **Time Event Scheduled:** defaults to current time. Enter correct time (using format HH:MMAM/PM)
- **Time In:** defaults to current time. Enter the correct time or click the clock icon.
- **Time Out:** complete after the **Activities** tab has been completed
- **Event Status:** leave status as **Pending Completion** until after the **Activities** tab has been completed
- **Complete the Office Visit Details**
- In the **Type of Office Visit** field, verify if the appropriate type of IEP was selected, for example, Triennial Health Assessment
- In the **Referral Source** field click on the drop-down arrow and **select Family/Parent**.
- In the **Primary Health Problem** field, click on the drop down arrow and **select Special Education**.
- **Click** in the **Complaint/Reason** textbox field and **type the kind of IEP**. (i.e. Initial Health Assessment)
- The **Confidential Status** field defaults to **Highly Confidential**
- Click **Save** and **OK** to the message



- Click **Yes** for the Included in the IEP field. **DO NOT LEAVE** this field blank. Make sure to click Yes.

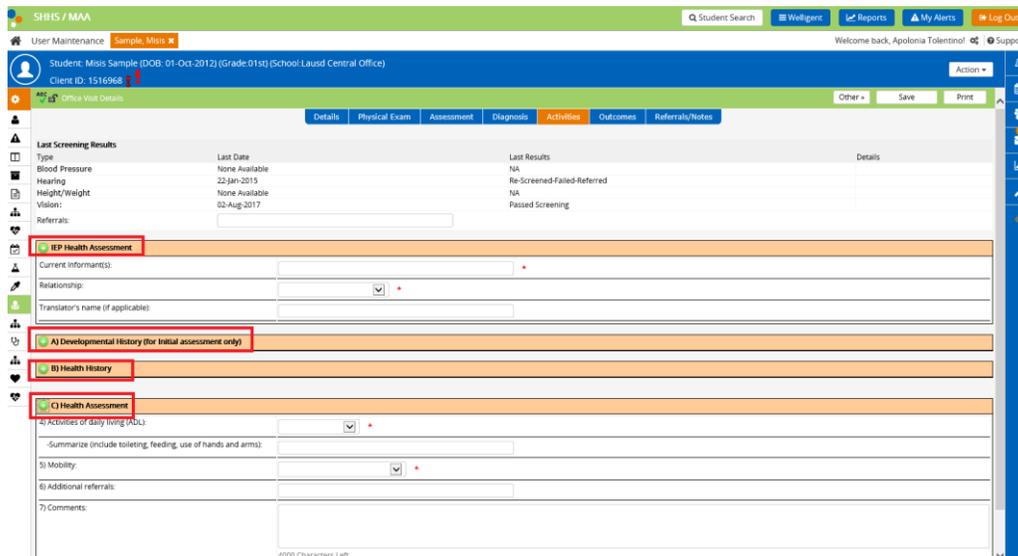


- Click **Activities** tab

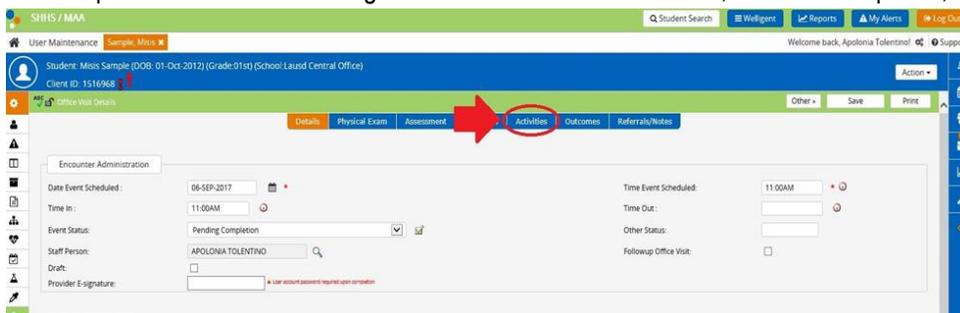
**b. Completing the Activities Tab**

The **Activities** screen for IEP office visits is different from the other office visits. The first section contains the **Last Screening** results (this the rationale for entering the screenings before starting the health assessment office visit).

- ✓ **IEP Health Assessment:** Current Informant; Relationship and/or Translator's name (if applicable)
- ✓ *Click the green plus to open each section. DO NOT LEAVE any field blank.*
- ✓ **Developmental History** (for **Initial assessment only**)
- ✓ **Health History**
- ✓ **Health Assessment**
- ✓ Complete the appropriate text areas. The information that has been gathered from the parent interview, student observation, school, and health/medical records.
- ✓ If there is not enough room in the text boxes for the information, it can be included in the comments or summary box at the end of each section. These can contain up to 1000 characters.
- ✓ To view/print a copy of the IEP Health Assessment report, **click on Print.**



- When completed, click the **Details** tab to update the Office Visit Event Status to Completed and enter password inside the E- Signature box and **Save**. Otherwise, if it's not completed, leave the status to

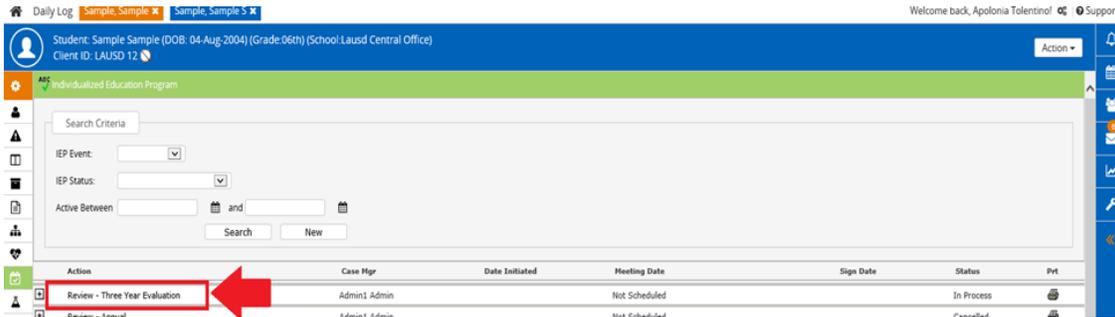


Pending Completion until all information has been entered.

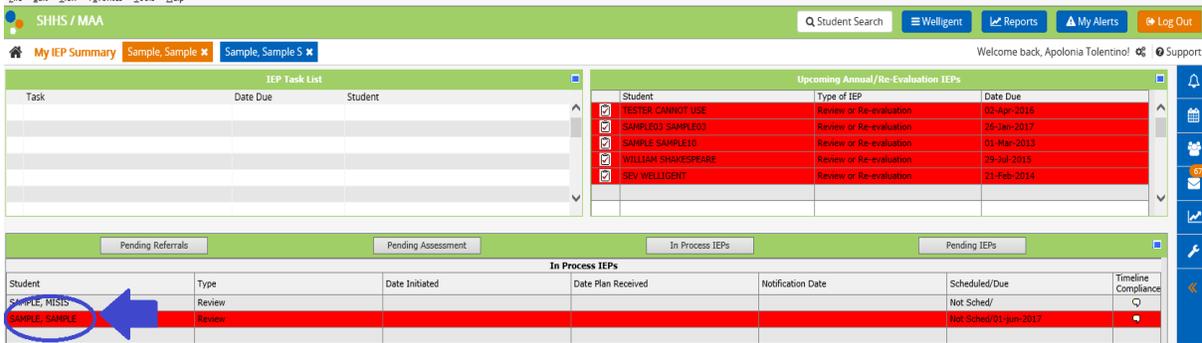
**NOTE:** Any office visits marked **"Completed"** will be locked with no possibility of unlocking it within two weeks.

### 3. PRESENT LEVEL OF PERFORMANCE (PLP): Summary of the Health Assessment

- From the **Record Navigator**, click the **IEP Event Listing**. From the list of student's IEPs, notice the **Meeting Date** and **Status**. **Select** the appropriate IEP Meeting Date with **In-Process** status by clicking the type of the IEP from the **Action** column **for example**, [Review - Three Year Evaluation](#)



**Note:** The student's IEP from the **My Toolbox** or **Welligent** > **My IEP Summary** provided that your name has been added as a participant. Here, you may see several students' names. Click the specific student's name to open the IEP document.



**Look for Section E: Present Level of Performance.** Click the green plus to add additional page



In completing the IEP document, Section E, refer to the SPED nursing guidelines on Present Level of Performance.

**Performance Area:** Health

**Assessment/Monitoring Process Used:** Record Review or Health Assessment, Screening, Interview with parents

**State/District Assessment Results:** Enter *n/a*

*NOTE: School Nurses MUST ask for assistance from Region Nursing Office when completing a PLOP for a student with Protocols or if unsure)*

General Format of a Present Level of Performance (PLOP): **For guidelines on contents, refer to SPED nursing guidelines**

- I. Health Summary
- II. Strength
- III. Area of Need
- IV. Impact of Disability
- V. Accommodations/Modifications

\*\*\*Each PLOP must have the School Nurse's name with title and date.