

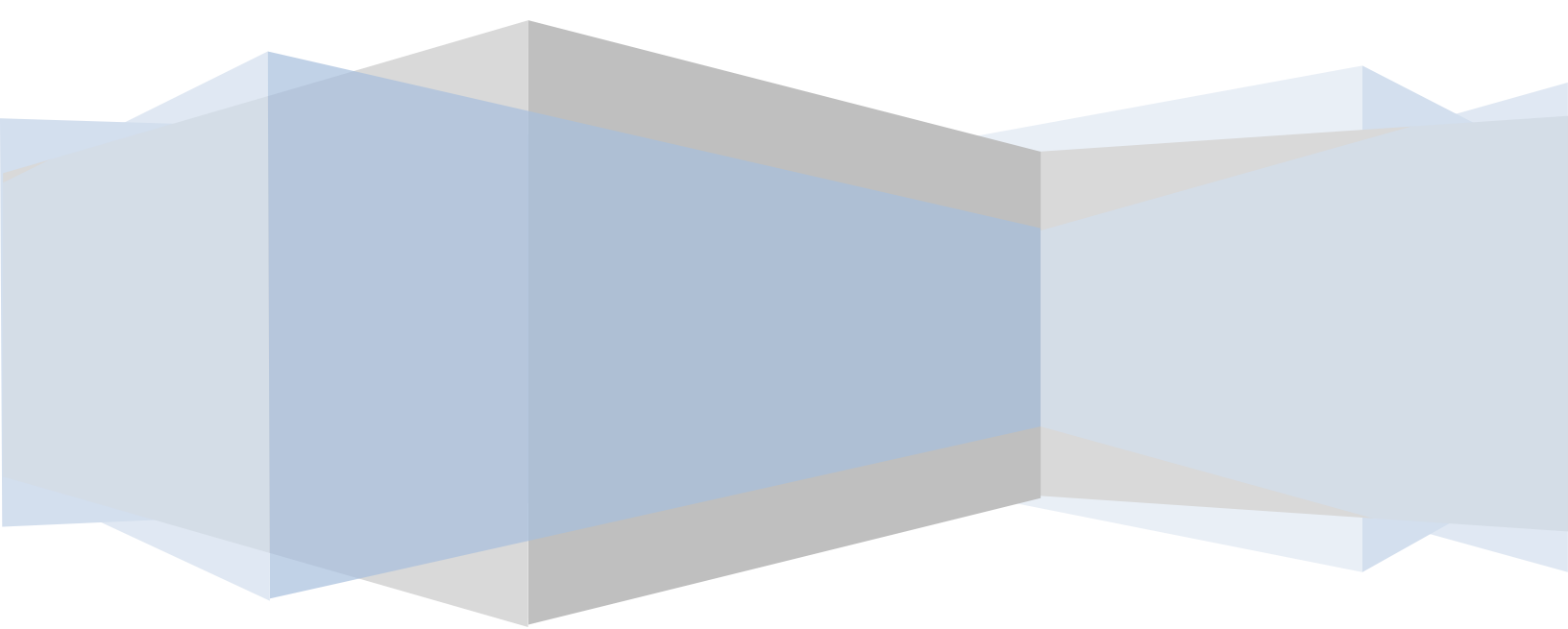


Iowa Department of Education

Interpretative Statement: Delegation of Health Services in Iowa Schools

Melissa Walker, School Nurse Consultant, Iowa Department of Education

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Interpretative Statement: Delegation of Health Services in Iowa Schools

Purpose:

Iowa students, as healthcare consumers, have the right to nursing care that meets the legal standards of health care regardless of the setting (National Council of State Boards of Nursing [NCSBN], 2005) (IAC 655 Chapter 6). School nurses are accountable for their practice of nursing in the educational setting and are also an integral member of the interdisciplinary education team to provide student's access to quality instruction in the least restrictive, safe school environment. School nurses ensure that students receive health services for physical or mental health conditions that permit school attendance so they may equally access education as their peers and also assist parents or legal guardians to reasonably meet compulsory attendance regulations for their child pursuant to Iowa Code 299. All health services provided to students that constitute nursing or any activity representing nursing in the school setting is a regulatory responsibility of the state licensing board of Nursing (NCSBN, 2005). The purpose of this statement is to provide a resource for Iowa school nurses to maintain accountability in safe, effective nursing practice by working with and through others when using professional judgment in the delegation of nursing tasks for students who require health services to attend school (NCSBN, 2005).

Background:

Delegation is used in many professional arenas of employment, to include education and healthcare.

Nursing delegation in schools is the process conducted by a nurse to transfer to a competent individual the authority to perform selected nursing tasks or activities in selected situations for a student (NCSBN, 2005).

Delegation of nursing tasks or activities is based on the school nurse's regulatory standards of licensed practice. The school nurse should understand the nursing task, the needs and condition of the student, stability and acuity of the student's condition, potential for harm, complexity of the task, and predictability of the outcome prior to delegation (American Nurses Association [ANA], 2011) (National Association of School Nursing [NASN], 2014).

The safety and wellbeing of the student is the center focus of all decisions regarding the delegation of nursing tasks (NCSBN, 2005).

Delegation of nursing tasks is an effective management tool used by the school nurse to:

- provide safe and effective nursing care
- free the school nurse to care for more complex student needs
- develop the skills of unlicensed assistive personnel
- promote cost containment for the school or organization (NCSBN, 2005).

The act of delegation is student specific and situation specific, not task specific (NCSBN, 2005).

Accountability of the School Nurse:

The school nurse retains accountability in delegation for:

- holding current licensure to practice nursing with their state regulatory licensing board
- Being knowledgeable of their scope and standards of practice (ANA, 2011).
- Understanding the Iowa Nurse Practice Act that is written to provide the consumer rights of protection when needing nursing care and provide the practicing nurse with safe parameters within which to work (IAC 655 Chapter 6)
- The completion of training with the Unlicensed Assistive Personnel (UAP) prior to a nursing task or activity being performed
- Ensuring proficient completion of the return skills demonstration for the delegated health task from the UAP to the school nurse prior to a nursing task or activity being performed
- Maintaining documentation while employed under the auspices of the school or organization to include the unlicensed assistive personnel's consent, competency and completion of education in delegated nursing tasks or activities
- Supervision, monitoring and evaluation of the UAP performing the delegated nursing task or activity
- The nursing process and evaluation of the student's health outcomes
- Following the 5 rights in delegation with the primary focus on student safety to include the right task, the right circumstance, the right person (UAP), the right direction/communication, and the right supervision, monitoring and evaluation

Accountability of Licensed Education Practitioners:

School administration and personnel retain accountability in delegation:

Licensed school administration and personnel adhere to regulation standards by the Iowa Board of Educational Examiners to protect the health and safety of students also by:

- not delegating educational tasks to unqualified personnel (IAC 282 Chapter 25)
- not performing beyond their licensed scope of practice (IAC 282 Chapter 25)
- maintaining conditions that are not harmful to student learning (IAC 282 Chapter 25)
- not aiding, assisting, or abetting an unlicensed individual in the completion of acts for which licensure is required (IAC 282 Chapter 25)

The Board of Educational Examiners has provided guidance if any licensed person violates one of the provisions of 282 IAC Ch. 25, a complaint could be filed and disciplinary action taken.

Together, licensed education practitioners and licensed school nurses follow regulatory standards and guidance in the delegation of their professional practices to protect the health and safety of Iowa students.

Steps in nursing judgement to determine delegation:

Step 1: The school nurse needs to assess their understanding of the task.

The school nurse should assess his or her understanding of the health task or activity that is required for the student to receive health services in the school setting. The duties of the licensed health personnel include updating knowledge and skills to meet special health service needs pursuant to IAC 281-41.405 (2) (a10). The school nurse maintains competency by having the knowledge and ability to perform, skillfully and proficiently, the functions within the role of the licensed nurse (IAC 655 Chapter 6).

Step 2: The school nurse assesses the student.

The school nurse collects data from various sources, to include but not limited to: nursing assessment of the student, the stability of the student's physical or mental condition, the complexity of the nursing task or activity, the predictability of the outcome from completing the nursing task or activity, healthcare provider information, family information, educational personnel information, environmental scan, resources available to adequately monitor, evaluate and supervise delegated tasks (Bobo, 2014; NCSBN, 2005; NASN, 2014).

Step 3: The school nurse assesses the nursing task or activity to be delegated.

The school nurse should ensure the nursing task or activity:

- is not complex
- is part of the student's routine healthcare
- follows a sequence of steps
- does not require assessment by the UAP
- does not require judgement by the UAP
- does not require interpretation by the UAP
- does not require modification
- has a predictable outcome
- is not beyond the ascribed level of practice of a Licensed Practical Nurse (IAC 655-6) (NCSBN, 2005) (NASN, 2014)

Step 4: The school nurse ensures that delegation is within the right circumstance.

The school nurse evaluates the communication, involvement, and trusting relationships between the parents, school, and nurse. The school nurse collaborates and communicates with the student's parent or guardian and school personnel to evaluate continuity of health services that meet the standards of nursing care provided to the student in the school environment (Bobo, 2014).

School nurses understand that families and school personnel may not be aware that nursing tasks performed in the home setting take on a more complex dimension in the school setting. School nurses are held to the higher regulatory standards when providing nursing care to a student or school population versus a parent or guardian delivering the same service at home to their child (NASN, 2014).

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The school nurse effectively delegates by taking into consideration nursing regulations, education regulations, expectations of parents/guardians, and ensuring the health and safety of the student and the entire school population.

Step 5: The school nurse is the licensed school personnel who identifies the UAP whom he or she will delegate nursing tasks or activities to in the school setting.

Primary consideration with assignment and delegation is given to the recommendation of the licensed health personnel (IAC 281-41.405(2) (c1-5)). The school nurse assesses the UAP's personal attributes to make a decision for successful delegation while retaining accountability pursuant to IAC 655-6.2(5). The personal attributes include, but are not limited to (Bobo, 2014):

- the UAP's credentials, education, or previous healthcare experience
- existing job duties or responsibilities
- willingness
- ability to follow guidelines, policies, and procedures
- ability to maintain confidentiality of information
- ability to work with children
- ability to understand the process of communication in an emergency situation
- consent from the UAP agreeing to perform delegated nursing tasks or activities (IAC 280.23)

Step 6: The school nurse assesses and plans the direction for the nursing task or activity.

The school nurse develops an individualized health plan for health services provided in the school setting and collaborates with educational personnel (IAC 281-41). The school nurse documents and provides training to the UAP on the delegated health task to include, but not limited to:

- documentation of training or certification completed that outlines the steps of the delegated nursing task that is included in the HR personnel file
- a return skills check on the delegated nursing task or activity performed by the UAP back to the school nurse to demonstrate competency
- training on the plan for communication with the school nurse
- training for how the UAP should document task completion

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Step 7: The school nurse collaborates and plans a two-way process of communication with the UAP that promotes trust, initiative, appreciation, and willingness to help each other in the provision of student health services in the school setting. The final piece of communication is timely documentation that is complete and accurate to facilitate collaboration with others and provide a record that the nursing task or activity was completed.

Communication from the school nurse to the UAP includes:

- Providing the UAP with student specific characteristics, including expected observations to report and document
- Identifying of specific student concerns that would require immediate communication with the school nurse
- Developing a system with the UAP to provide frequency of communication, onsite monitoring, supervision, training, and evaluation of the UAP that is clear, concise, and complete
- Assessing the UAP's understanding, providing feedback, and answering questions regarding delegated nursing tasks (NCSBN, 2005, 2016)

Communication from the UAP to the school nurse includes:

- Being able to ask questions to the school nurse about delegated nursing tasks
- Being able to seek clarification by the school nurse of expectations any time prior to performing health services
- Informing the school nurse if he or she has never completed the task before or has only completed the task a few times
- Being able to ask for additional training or supervision by the school nurse
- Affirming with the school nurse understanding of expectations
- Assisting with determining the communication plan between the school nurse and UAP if the two are in different locations or school sites
- Assisting with the communication plan in emergency situations
- Documenting of the completed delegated nursing task or activity (NCSBN, 2005,2016)

Step 8: The school nurse provides the UAP with supervision, monitoring, and evaluation on the delegated nursing tasks or activities.

The school nurse would complete steps in determining the safety in delegation to effectively supervise, monitor, and evaluate the UAP by:

- Assess frequency and opportunity between the school nurse and unlicensed assistant personnel [UAP] to communicate and interact
- Assess opportunity to provide training, frequency of onsite supervision, and monitoring of the delegated nursing task
- Assess the opportunity for the nurse to evaluate the effectiveness of delegation and desired student outcomes

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- Lastly, assess the systems in place to document nursing services provided (NCSBN, 2005, 2016)
- **The school nurse would evaluate the delegated nursing task by asking:**
- Was the nursing task performed correctly and documented?
- Was the student's expected health outcome achieved?
- Was the outcome optimal?
- Was the communication between the UAP and nurse timely and effective?
- Were there challenges and if so, how were they addressed?
- Was appropriate feedback provided to the UAP?
- Was the UAP acknowledged for accomplishing the task?

Step 9: The school nurse determines the frequency for onsite supervision and monitoring based on the student and experience of the UAP to ensure compliance with standards of practice, policies, and procedures by considering:

- The student's health status and stability of physical or mental condition
- The predictability of responses and risks
- The setting where the nursing tasks or activities occur
- Availability of resources
- Complexity of the task (NCSBN, 2005, 2016)

The school nurse retains accountability to determine frequency of onsite supervision and assessment by:

- Reviewing the needs of the student
- Complexity of nursing task or activity
- Proximity of nurse's location
- Assessment of the UAP's comfort level and understanding of the delegated task (NCSBN, 2005, 2016)

The school nurse is responsible for:

Timely intervention and follow up for concerns regarding the student or UAP completing delegated of nursing tasks or activities (NCSBN, 2005, 2016).

When the School Nurse should not delegate or accept an assignment

School nurses cannot delegate the nursing process in the act of delegation, to include:

- assessment
- formulating nursing diagnoses
- family or patient education
- planning
- supervision
- monitoring
- evaluation
- nursing judgement
- any nursing activities or functions which are beyond the scope of practice of the licensed practical nurse (Iowa Board of Nursing [IBON], IAC 655-6) (NCSBN, 2005,2016)

School nurses should decline an assignment when asked to delegate nursing services if the school nurse:

- does not have the authority to intervene or take correct action if necessary
- has never performed the health task that is to be supervised, monitored and evaluated
- does not have the opportunity and/or proximity to provide effective monitoring, evaluation, or onsite supervision
- would not be able to intervene if there was a problem

(NCSBN, 2005, 2016)

School nurses may make a determination against delegation of nursing tasks or activities for reasons to include:

- Regulatory issues
- Failure of the unlicensed assistive personnel [UAP] to demonstrate competency in the nursing task after completion of training
- Incomplete demonstration of competency in performing the nursing task by the UAP when providing health services
- Issues with resource utilization (the school nurse cannot safely provide onsite supervision, monitoring, or evaluation the delegated nursing tasks)
- Student health status change
- Assessment data

Delegation versus Assignment:

An assignment is the provision of nursing care requested from a school district or school administrator to a school nurse that is within the authorized scope of practice for the nurse.

Delegation is the act of transferring to the unlicensed assistive personnel the performance of specific nursing tasks that is beyond the UAP's role in the school setting after obtaining additional training and a competency skills check is validated by the nurse delegating the task (NCSBN, 2016).

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Summary:

Advances in healthcare and technology enable children with increasingly complex health needs to participate in the general education setting (NASN, 2014). The incidence of chronic health conditions and complex medical conditions that were previously handled in the acute care settings are now being managed in the school setting, requiring school nurses to make decisions to delegate when appropriate (NASN, 2014; Van Cleave, Gortmaker, & Perrin 2010; Federal Interagency Forum on Child and Family Statistics, 2013). Iowa school nurses ensure the safe provision of health services through the delegation decision making process for nursing tasks or activities following regulatory standards of practice with the student's fundamental right to safety and the student population needs in mind.

The Interpretative Statement on Delegation was reviewed by:

Iowa Board of Educational Examiner ,Iowa Board of Nursing, Iowa Department of Education,
Iowa School Nurse Organization

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School Nurse Resources:

To access a decision making tree for delegation to Nursing Assistive Personnel, please go to the Transition to Practice Preceptor Toolkit ,(NCSBN, 2011), document by following the link:

<https://www.ncsbn.org/Preceptor-DelegationProces.pdf>

To access a decision making tree for delegation, please go to page 11 of the “*NCSBN: Working with Others*” (2005) document by following this link: <https://www.ncsbn.org/1625.htm>

To access a decision making tree for Accepting Assignment to Supervise Unlicensed Assistive Personnel, please go to page 16 of the “*NCSBN: Working with Others*” (2005) document, by following this link: <https://www.ncsbn.org/1625.htm>

To access the National Association of School Nurse [NASN] Position Statement on Delegation, Please follow this link:

<https://www.nasn.org/PolicyAdvocacy/PositionPapersandReports/NASNPositionStatementsFullView/tabid/462/ArticleId/21/Delegation-Nursing-Delegation-to-Unlicensed-Assistive-Personnel-in-the-School-Setting-Revised-June-2>

To access the “Delegating Effectively Video” on nursing delegation, please follow this link:

<https://www.ncsbn.org/378.htm>

To access the Iowa Board of Nursing practice and delegation resources, please follow the link:

<https://nursing.iowa.gov/nursing-practice>

Resources

- American Nurses Association. (2011) *School nursing: Scope and standards of practice*. American Nurses Association. Silver Springs, Maryland.
- American Nurses Association & National Council of State Boards of Nursing. (2006). *Joint statement on delegation*. Retrieved from:
https://www.ncsbn.org/Delegation_joint_statement_NCSBN-ANA.pdf
- Bobo, N. (2014). *Principles for practice: Nursing delegation to unlicensed assistive personnel in the School Setting*. National Association of School Nurses. Silver Spring, Maryland.
- Federal Interagency Forum on Child and Family Statistics. (2013). *America's children: Key national indicators of well-being, 2013*. Washington, D.C.: U.S. Government Printing Office. Retrieved from http://www.childstats.gov/pdf/ac2013/ac_13.pdf
- National Association of School Nurses. (2014). *Position Statement: Nursing delegation to unlicensed assistive personnel in the school setting*. Retrieved from:
<https://www.nasn.org/PolicyAdvocacy/PositionPapersandReports/NASNPositionStatementsFullView/tabid/462/ArticleId/21/Delegation-Nursing-Delegation-to-Unlicensed-Assistive-Personnel-in-the-School-Setting-Revised-June-2>
- National Council of State Boards of Nursing. (2005). *Working with others: A position paper, Executive Summary*. Retrieved from: <https://www.ncsbn.org/index.htm>
- National Council of State Boards of Nursing (2016). National guidelines for nursing delegation. *Journal of Nursing Regulation*, 7(1), 5-14.
- State of Iowa. (2015). Iowa Code and Iowa Administrative Code [IAC]. Des Moines, Iowa: State of Iowa. Retrieved from: <http://www.legis.state.ia.us/>
- Iowa Code 282 IAC Chapter 25
- Iowa Code 280.23
- Iowa Code 299
- IAC 281 Chapter 41
- IAC 655 Chapter 6
- Van Cleave, J., Gortmaker, S., & Perrin, J. (2010). Dynamics of obesity and chronic health conditions among children and youth. *Journal of the American Medical Association*, 303(7), 623-630.

Using Steps 1 thru 9: Nursing Judgement in the School Setting With Delegation

The school nurse assesses their understanding of the task to be performed at school	
Step 1	<i>If comfortable with task=Continue to Step 2</i>
	<i>If not comfortable with task= Do not advance, request for additional training, and communicate with school administration</i>
The school nurse assesses the student	
Step 2	<i>Adequate data collected=Continue to Step 3</i>
	<i>Inadequate data collected=Do not advance and request additional information</i>
The school nurse assesses the nursing task or activity to be delegated	
Step 3	<i>The task or activity is not complex, part of the student's routine healthcare, follows a sequence of steps, does not require assessment, does not require judgement, does not require interpretation, does not require modification, has a predictable outcome, is not beyond the ascribed level of practice of the LPN=Continue to Step 4</i>
	<i>The activity is complex, not part of the student's routine healthcare, does not follow a sequence of steps, requires assessment, requires judgement, requires interpretation, requires modification, does not have a predictable outcome, is beyond the ascribed level of practice of the LPN= Do not advance, maintain responsibility for completion of task, communicate information regarding delegation decision with school administration and document</i>
The school nurse determines if the potential delegated task is in the right circumstance	
Step 4	<i>Consideration meets nursing regulations, education regulations, evaluation of communication of trusting relationship between parents, school, and nurse is completed. The school nurse has considered the expectations of the parent/guardian. The school nurse is able to provide nursing services to the student and school population=Continue to Step 5</i>
	<i>The consideration does not meet nursing regulations or education regulations, the evaluation of communication and trusting relationship between the parents, school, and nurse has not been completed. The school nurse has not considered the expectations of the parent/guardian. The school nurse is not able to provide nursing services to the student and the school population=Do not advance, maintain responsibility for completion of task, reevaluate the circumstance with delegation, communicate information regarding delegation decision with school administration and document</i>

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Using Steps 1 thru 9: Nursing Judgement in the School Setting With Delegation	
The school nurse identifies the UAP to delegate the task	
Step 5	<p><i>The school nurse assesses the UAP’s personal attributes and has evaluated the UAP’s credentials, education, previous healthcare experience, existing job responsibilities and duties. The UAP demonstrates willingness, ability to follow guidelines, policies, and procedures. The UAP has demonstrated the ability to maintain confidentiality, has the ability to work with children and understands the process of communication in an emergency situation. The UAP has provided written consent to perform delegated nursing tasks or activities=Continue to Step 6</i></p>
	<p><i>The school nurse assesses the UAP’s personal attributes and has evaluated the UAP’s credentials, education, previous healthcare experience, existing job responsibilities and duties. The UAP demonstrates unwillingness, inability to follow guidelines, policies, or procedures. The UAP has demonstrated the inability to maintain confidentiality, has difficulty working with children or does not understand the process of communication in an emergency situation. The UAP refuses to provide written consent to perform delegated nursing tasks or activities= Do not advance, maintain responsibility for completion of task, reevaluate the circumstance with delegation and communicate information regarding delegation decision with school administration and document</i></p>
The school nurse assesses and plans the direction for the nursing task	
Step 6	<p><i>The school nurse develops an individual health plan for health services provided in the school setting and collaborates with educational personnel.</i></p> <p><i>The school nurse documents training or certification that outlines the steps of the nursing task that is included in the HR personnel file to include:</i></p> <ul style="list-style-type: none"> ➤ <i>training or certification,</i> ➤ <i>documentation of a return skills check performed by the UAP to the school nurse to demonstrate competency,</i> ➤ <i>documentation of training on a plan to communicate between the UAP and nurse</i> ➤ <i>documentation of training on how the UAP should document task completion</i> <p><i>Once health plan, training and documentation is complete: Continue to Step 7</i></p>
	<p><i>If the development of the health plan, training and documentation is not complete: Do not advance</i></p>

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Using Steps 1 thru 9: Nursing Judgement in the School Setting With Delegation

The school nurse collaborates with the UAP for a two way process of communication

Step 7

Communication from the school nurse to the UAP:

- provide student specific characteristics,
- expected observations to report and document,
- identify and share specific student concerns that would require immediate communication with the nurse,
- develops a system with the UAP to provide frequency of communication, training, onsite monitoring, supervision, evaluation that is clear, concise, and measurable.
- The school nurse assesses the UAP's understanding, provides feedback and answers questions regarding delegated nursing tasks

Communication from the UAP to the School Nurse:

- includes the ability to ask questions,
- seek clarification by the nurse of expectations,
- informing the school nurse if they have never performed the task before,
- being able to ask for additional training or supervision by the school nurse,
- affirming expectations with the school nurse,
- assisting in determining the communication plan between the school nurse and UAP if they are in different buildings,
- assisting in the communication plan for emergency situations
- documentation of the completed delegated nursing task or activity

When the process of communication above has been agreed upon between the UAP and School Nurse: **Continue to Step 8**

Topics have not been addressed between the UAP and School Nurse: **Do not advance, maintain responsibility for completion of task, reevaluate communicated information and identified barriers regarding the process of communication in the delegation decision. Discuss communication barriers with school administration and document.**

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Using Steps 1 thru 9: Nursing Judgement in the School Setting With Delegation	
The school nurse develops a plan addressing frequency to supervise, monitor and evaluate the UAP performing the delegated nursing task	
Step 8	<p><i>The school nurse completes steps in determining safety in delegation to effectively supervise, monitor and evaluate by: Assessing frequency and opportunity for the UAP and school nurse to communicate and interact, assess opportunities to provide training, frequency of onsite supervision, and monitoring of delegated task.</i></p>
	<p><i>The school nurse would evaluate the delegated nursing task by asking:</i></p> <ul style="list-style-type: none"> ➤ <i>Was the task performed correctly and documented?</i> ➤ <i>Was the student's expected health outcome achieved?</i> ➤ <i>Was the outcome optimal?</i> ➤ <i>Was the communication between the UAP and nurse timely and effective?</i> ➤ <i>Was appropriate feedback provided to the UAP?</i> ➤ <i>Was the UAP acknowledged for accomplishing the task?</i> <p><i>The school nurse has determined training, is available to meet frequency for onsite supervision and monitoring of delegated task and has a process to communicate with the UAP: Continue to Step 9</i></p> <p><i>The school nurse does not have the resources available to provide training or frequency with onsite supervision and monitoring of delegated task. The school nurse does not have a process to communicate with the UAP: Do not advance, maintain responsibility for completion of task, Discuss delegation barriers with school administration and document.</i></p>
The school nurse conducts and documents the supervision, monitoring and evaluation of the delegated nursing task	
Step 9	<p><i>The school nurse utilizes the following for determining frequency for onsite supervision and monitoring based on the student and experience of the UAP to ensure compliance with standards of practice, policies and procedures:</i></p> <ul style="list-style-type: none"> ➤ <i>The student's health status</i> ➤ <i>The student's stability of their physical or mental condition</i> ➤ <i>The predictability of response and risks</i> ➤ <i>The setting where the nursing tasks or activities occur</i> ➤ <i>Availability of resources</i> ➤ <i>Complexity of the task</i> <p style="text-align: center;">The school nurse documents the supervision, monitoring, and evaluation of the delegated nursing task.</p>

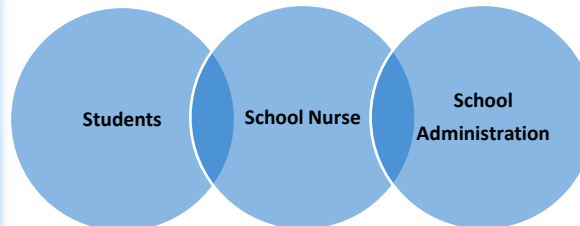
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School Nurse And School Administration Collaboration Model

School administration identifies and acknowledges the school nurse as the leader for delegation of health services and oversight of delegated nursing tasks

The school nurse communicates information with school administration on decisions to delegate, not delegate or revoke delegation to the school administration and to school unlicensed assistive personnel

The school nurse and school administration evaluate school health service policies and procedures addressing delegation



All delegated nursing tasks require demonstration of knowledge and competency on how to perform a delegated task to ensure student safety. The school nurse documents demonstration and must provide supervision, monitoring and evaluation.

The school nurse determines what nursing tasks in the district or school can be delegated by reviewing the UAP's credentials, communication plan, regulations, task, the student, and the situation