Nursing Process Documentation: The Individualized Healthcare Plan

Barbara Nowak, DNP, RN, FNP-C
Presenter Disclosure

Barbara Nowak

I disclose the absence of personal financial relationships with commercial interests relevant to this educational activity within the past 12 months.
My goal is to remind you of your first love of nursing and through your professional obligations of documentation help you to articulate your services to your fellow nurses and educators.
Objectives:

1. Define the steps of the nursing process.
2. Describe the purpose and value of the Individualized Healthcare Plan (IHP) in the school setting.
3. Explain the differences between the IHP, IEP, 504, EEP, and EAP.
4. Demonstrate evaluation techniques for compliance with nursing process documentation.
Why do we chart?

Charting is my favorite part of my job.
Said no nurse ever!
Purpose of Charting:

1. Establish a legal document to demonstrate nursing care given to a patient.
2. Provide a communication tool for the health care team to ensure quality health care.
3. Create a source of data that can be used to research and improve patient outcomes.
Types of School Nurse Documents

• Individualized Healthcare Plan (IHP) – the foundation of all school health documents
• Emergency Action Plan (EAP)
• Emergency Evacuation Plan (EEP)
• Section 504
• Individual Education Plan (IEP)
“Through the development and implementation of IHPs, school nurses promote both the health and academic success of students with chronic health conditions such as asthma, diabetes seizures disorders, and food allergies.”

National Association of School Nurses, Principles of Practice, 2017
NASN: The Purpose of the IHP

- Document nursing process
- Care coordination
- Facilitate evidenced based treatments
- Facilitate access to curriculum
NASN: The Purpose of the IHP

- Establish delegated duties
- Supports the IEP & 504
- Drives the multidisciplinary team
- Improves academic success
Nursing Process Documentation is Especially Important in the School Environment

- Student arrival
- Record transfers
- School vacations
- Medicaid billing
- Need for coordinated care
- Tension between health and educational needs
Zimmerman: The Value of IHP

• Provide coordinated care
• Facilitate the management of the student’s health conditions in the school setting
• Inform school educational plans
• Promote academic success
• Foundational to other plans in the school (IEP, 504, EEP, EAP)
Zimmerman: The Value of IHP

• Develop a legal document to demonstrate use of the nursing process to care for students.
• Consolidates health information
• Sets priorities
• Helps to create a safe determination of delegation of care
• Facilitates the management of care in the school to improve access to education
• Helps to bridge the difference between educational and healthcare goals in the school setting
Steps of the Nursing Process

- Assessment
- Diagnosis
- Planning
- Implementation
- Evaluation
Evaluating Documentation of IHPs Using an Electronic Health Record

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Background:
- Registered School Nurses (SN) have a responsibility to develop an Individualized Health Care Plan (IHP) for students whose health conditions may affect their safe and optimal academic performance and attendance (NASN, 2015).
- The SN should use the IHP as a guidance document to coordinate care, manage students’ healthcare needs within the school, delegate nursing activities, inform school emergency (EAP, EEP) and educational plans (504, IEP), and promote academic success (Will, Arnold, & Zaiger, 2017).
- Since the IHP is foundational to healthcare in the school setting as well as development of educational and emergency plans, students with chronic health conditions supported by medical documentation should have an IHP in their cumulative health record.
- Electronic Health Record (EHR) usage in the school setting is increasing and can be used to maintain IHPs. EHRs are an effective tool and can be used to mine data for quality improvement purposes through prebuilt reports (Terry, 2015).

Purpose:
The project goal was to evaluate the existence of IHP documentation in the school division using the prebuilt data reports within the EHR.

Project Question:
Are IHPs documented and current on students with identified chronic health conditions in the EHR?

Evaluation Strategies:
- Investigation #1: Run chronic condition reports and IHP listings for all schools through the EHR and compare the two lists.
- Investigation #2: Visually inspect 25% of randomly selected health records of those students identified with asthma to further understand the findings and determine whether the discrepancy was due to user error or a true lack of IHP.

Findings Investigation #1
Data demonstrated that 19% of the students within the division were identified as having a chronic condition and 6.3% of those identified had a current IHP. Further, 70.6% of schools had less than 5% of students identified with chronic conditions with active IHPs.

Findings Investigation #2
Of the 409 students with asthma EHR inspected, 63 (15%) had current medication orders associated with an active IHP, 24 (6%) had current medication orders not associated with an active IHP, and 322 (79%) had no medication orders and no IHP.

Conclusion:
The findings demonstrated the school nurses were not completely documenting IHPs for students identified with chronic conditions. Investigation #2 helped identify problem areas associated with IHP documentation which included:
- Lack of understanding of the proper use of the EHR to document IHPs
- Lack of understanding of the purpose of IHPs in school health
- User error and usage of the prebuilt reports to accurately reflect IHP documentation
- Lack of uniformity in the differentiation between Chronic Conditions, Alerts, and Allergies

Intervention:
Professional development was required to overcome the lack of knowledge and user error. The PD was offered to all nurses in the division. Those unable to attend the group session were offered individualized instruction. A goal was established: By June 2020, all student records will be reviewed and reflect accurate documentation of chronic conditions and IHPs. This will be accomplished by:
- Reviewing records to ensure chronic conditions are accurately entered in the EHR and are based on medical documentation and thorough nursing histories. Chronic conditions that were not based on medical documentation and history and those that would no longer have a potential or actual effect on the student’s safe and optimal academic performance and attendance would be inactivated.
- Writing IHPs correctly in the EHR for all students with chronic conditions that will affect their safe and optimal academic performance and attendance.
- Running chronic condition reports and IHP listings on a semi-annual basis to evaluate for compliance.
- Providing ongoing Professional Development to ensure proper usage of the EHR.

Pre and Post Intervention Evaluation Results
A second run of the IHP listing and chronic condition report was analyzed three months after the professional development. The data demonstrated a decrease in the number of chronic conditions documented on the EHR and an increase in the number of actual IHPs. The number of schools without IHPs decreased significantly.

Comparison of Pre and Post PD Data

<table>
<thead>
<tr>
<th></th>
<th># of Chronic Conditions</th>
<th># IHPs associated with Chronic Conditions</th>
<th>Percentage of schools with &lt;5% IHPs associated with chronic conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-PD</td>
<td>2970</td>
<td>187</td>
<td>70.6%</td>
</tr>
<tr>
<td>Post-PD</td>
<td>2777</td>
<td>764</td>
<td>5.9%</td>
</tr>
</tbody>
</table>

References:
- ANA/Environment/Support/Topics/Research/May-2015/Article-Previous-Topics/
- Technology-Safety-and-Professional-Care-Documentation.html
Quotes from NASN Conference Attendees:

“IHPs do nothing to improve student health.”
Individualized Healthcare Plan: **ASTHMA**

**Nursing Diagnosis:** *Potential Ineffective Airway Clearance r/t tracheobronchial narrowing and excessive secretions*

**Goal:** *By the end of the school year, student will experience less than 15 minutes out of class time related to his asthma per week.*

**Interventions:** *Teach student to recognize and avoid triggers...*  
*Teach student to effectively use inhaler....*
EVALUATION:
Student has used inhaler one time this school year associated with a cold.

OR
Student has had multiple PHP appointments, ER visits, and absences related to his asthma since enrolling in February. He presents to the clinic 2-3 times per week requiring his inhaler 75% of the time. Guardian has had difficulty managing asthma at home and medications have been given inconsistently. Began speaking with guardian about delivering maintenance meds at school next year.

OR
Inhaler use prior to recess did not eliminate wheezing post recess. Discussed student’s activities in Iraq with Dad and discovered student never allowed outside in large areas for fear of terrorist attack. Seeking assistance from school psychologist to help student overcome fear of being out in the large open playground field.
Quotes from NASN Conference Attendees:

“IHPs are a worthless piece of paper.”
### Monthly Clinic Report

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
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</thead>
<tbody>
<tr>
<td>Enrollment</td>
<td>895</td>
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<tr>
<td>Clinic Visits</td>
<td>417</td>
</tr>
<tr>
<td>Return to Class</td>
<td>374</td>
</tr>
<tr>
<td>Parent Phone Calls</td>
<td>70</td>
</tr>
<tr>
<td>Medications</td>
<td>220</td>
</tr>
<tr>
<td>Procedures</td>
<td>58</td>
</tr>
<tr>
<td>IHPs</td>
<td>102</td>
</tr>
<tr>
<td>504s</td>
<td>36</td>
</tr>
<tr>
<td>Delegated Procedures</td>
<td>14</td>
</tr>
</tbody>
</table>
Quotes from NASN Conference Attendees:

“IHPs are a waste of time.”
Lawyer: “Both the ANA and NASN standards of practice state that children with chronic conditions should have an Individualized Health Care Plan. Did you write an IHP for Joey?”

Nurse: “NO”

Lawyer: “Did you received the Asthma Action Plan from his doctor?”

Nurse: “YES”

Lawyer: “Is asthma a chronic condition?”

Nurse: “WELL, YES, BUT……”

Lawyer: “Then, why did you fail to write an IHP?”

Nurse: “WELL, I ONLY WRITE THEM FOR STUDENTS WHO REALLY NEED THEIR INHALERS.”

Lawyer: “So, you determined that Joey didn’t really need his inhaler?”

Nurse: “WELL…..”

Lawyer: “Joey ended up in ICU. Do you think he needs his inhaler now?”
Developing an Individualized Care Plan
The assessment provides key information from which critical thinking and decision making lead to a nursing diagnosis (Zimmerman, 2016).
Assessment

- Nursing history and assessment
- Document Review
- Self-Care
- Psycho-Social
- Cultural
- Academic
Developing a Nursing Care Plan/IHP

Diagram showing the nursing process with components such as assessment, nursing diagnosis, implementation, planning, and evaluation.
Hey Girl

What's the nursing diagnosis for love at first sight?
A nursing diagnosis provides the foundation to formulate the nursing interventions needed to achieve the outcome to care (Zimmerman, 2016).
## Developing a Nursing Diagnosis in School Nursing

<table>
<thead>
<tr>
<th>Need or Problem Derived from the assessment NANDA List</th>
<th>R/T</th>
<th>What caused the problem</th>
<th>As Evidenced By</th>
<th>Evidence of the problem</th>
</tr>
</thead>
</table>

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Developing a Nursing Care Plan/IHP

Outcomes
EXPECTED OUTCOMES

Goals should be stated in clear, concise, realistic, attainable, and measurable language that have some element of time attached (Zimmerman, 2016).
Expected Outcomes

- Measurable, time related
- Student focused describing a measurable behavior
- Culturally, socially, psychologically appropriate
- Realistic
- SMART – Specific, Measurable, Action oriented, realistic, and time sensitive
Developing a Nursing Care Plan/IHP

Interventions
PLANNING

Developing a plan requires critical thinking and provides a road map that directs the interventions that will be provided.
Nursing Interventions are Based on Nursing Diagnoses

• Any treatment based upon clinical judgment and knowledge that a nurse performs to enhance patient/client outcomes (Bulechek et al, 2013)

• Must decide who, when, and where interventions can be applied during the school day

• Used to drive delegation
Examples of Interventions Relevant to School:

- Special Services: PT, OT
- Paraprofessional role in ADLs
- In-service training
- Health education

The determination of how success toward meeting the goals will be measured must be written into the plan at this point and not after the care has been provided (Zimmerman, 2016).
Developing a Nursing Care Plan/IHP
IMPLEMENTATION

Actualization of the Plan: Direct and indirect nursing interventions are carried out.
Developing a Nursing Care Plan/IHP
EVALUATION

The evaluation step is the key to nursing process and demonstrates professional accountability.
Evaluation

Have the goals been met?
Do the interventions need to be modified?
Is the nursing diagnosis correct?
# Student Example

<table>
<thead>
<tr>
<th>Nursing Diagnosis</th>
<th>Goals (Expected Outcomes)</th>
<th>Plan of Action</th>
<th>By Whom/When</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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PEDIATRIC HISTORY AND PHYSICAL EXAM

Natan (DOB – 11/12/2008) is a 8 years 8 months old male who is here for a school entrance physical. He was born in Afghanistan and Farsi is the primary language spoken in the home. The child has recently emigrated from Afghanistan and has no medical or dental home or insurance. The father was given insurance and medical access information. His father is the historian and he speaks fluent English.
REVIEW OF SYSTEMS:

All systems unremarkable except:

Skin: Areas of thick dry skin across the right side of head, neck, back and lower abdomen.

M/S: Student ambulates with a limp and right foot drop. Falls occasionally when attempting to run. Denies issues with pain and swelling of joints.

Neurologic: Has had grand mal seizures since birth, well controlled with medications. Has never been hospitalized for seizures since infancy. Has never attended school and has no academic skills.

Psychological: Denies issues with restlessness, inattentiveness, sleep disturbances, night terrors, separation anxiety, or trouble playing with others. Student did witness acts of war and terrorism.
Create an IHP

- What are the students problems and nursing diagnoses?
- What are the expected outcomes?
- What are the nursing interventions?
Evaluation
Using Embedded Reports to Evaluate IHPs