

MEDICATION ADMINISTRATION DELEGATION/TRAINING CHECKLISTS

Purpose: These checklists are designed to assist the school district/school nurse in determining the level of medication administration training needed to train unlicensed schools staff in various situations, the forms to include, and the evaluation and follow-up required. School nursing administrators and school nurse leaders may use these checklists to develop district level policies, procedures and protocols around delegation and medication administration training that are based on the State of Alaska delegation guidelines and training guides.

Background: As per 12 AAC 44.965 DELEGATION OF THE ADMINISTRATION OF MEDICATION, “the person to whom the administration of medication is to be delegated must successfully complete a training course in administration of medication approved by the board.” The criteria for meeting [Alaska Board of Nursing medication administration course requirements](http://commerce.alaska.gov/dnn/Portals/5/pub/Medication_Scope_of_Practice.pdf) are available online (http://commerce.alaska.gov/dnn/Portals/5/pub/Medication_Scope_of_Practice.pdf).

Training Guides: The following [training guides](http://dhss.alaska.gov/dph/wcfh/Pages/school/resources.aspx#pubs), approved by the Alaska Board of Nursing, are available online (<http://dhss.alaska.gov/dph/wcfh/Pages/school/resources.aspx#pubs>) for school districts to utilize when developing district policies, procedures and protocols for trainings.

- **Medication Administration: Guide for Training Unlicensed School Staff** is a basic medication administration guide in training school staff on medications *delegable by registered nurses* (i.e., routinely scheduled oral, topical, transdermal, nasal, inhalation, optic, otic, vaginal, or rectal medications).
- **Emergency Medication Administration: Guide for Training Unlicensed School Staff** is a guide for training school staff in epinephrine, glucagon and diazepam rectal gel. These medications are *not delegable to staff by a registered nurse but the parent may designate unlicensed staff to administer them and the nurse may provide the training.* (See *Medication Administration Delegation Decision Tree*)
- **Diabetes Management: Guide for Training Unlicensed School Staff** is an intensive course in diabetes management intended for training school staff in schools where the nurse is not on site full-time and a student(s) with diabetes needs safe, supervised care. Skills training needed will depend on the individual student situation.

Checklists: The Alaska Board of Nursing recognizes that training and delegation should be customized to the individual student and that content may vary according to the situation. Below are suggestions for the breakdown of training materials and forms to be included for three common scenarios seen in schools:

1. **Daily, Frequent and/or Emergency Medications:** For unlicensed school staff administering medications on a regular basis when the school nurse is not on-site or available full-time.
2. **Field Trip:** For school staff that are only administering medications for a short-term purpose such as a singular or after-school event.
3. **Extracurricular, School-Sponsored Activity:** For staff who are responsible for administering medications for regular activities related to school but outside the normal school hours.



I. DAILY, FREQUENT AND/OR EMERGENCY MEDICATIONS

Student medications necessary for school attendance given by unlicensed school staff on a daily or frequent basis and, often for multiple students should be addressed by presenting the entire content contained in the **Medication Administration: Guide for Training Unlicensed School Staff**. In addition, staff should be trained on any emergency or diabetes medications, as appropriate for the school’s student population, utilizing **Emergency Medication Administration: Guide for Training Unlicensed School Staff** and **Diabetes Management: Guide for Training Unlicensed School Staff**.

Staff administering medications in the absence of a full-time school nurse should be given medication training(s) on an annual basis, be delegated medication administration for each individual student and follow up staff competency on a regular basis.

✓	Steps for Delegation and Training
	<p>1. Collaborate with the parents, healthcare provider and school administrator to develop an Individualized Healthcare Plan(IHP) and Emergency Care Plan (ECP),</p> <ul style="list-style-type: none"> • Obtain appropriate authorizations (i.e., parent signature for medication administration, procedure and care plan forms, healthcare provider orders), • Provide a nursing assessment of the student and his/her healthcare needs, and • Address how medication administration should occur when the nurse is not available (e.g., out of the school building).
	<p>2. Determine appropriate staff to administer medications – work with the administrator, parents, and, as needed, the healthcare provider; staff assigned must do so voluntarily.</p>
	<p>3. For parent-delegated medications, document their request asking to train unlicensed school staff. See form Medication Administration: Parental Request for Training Unlicensed School Staff to Administer.</p>
	<p>4. Provide the training(s). Document the training and competency via the pre- and post-test and evaluation of mastery checklist (forms available per specific training). Maintain a list of appropriately trained staff. See form List of Trained Unlicensed School Staff.</p>
	<p>5. For parent-delegated medications, document their authorization for the trained school staff member(s) to administer the medication(s). See form Medication Administration: Parental Authorization for Trained Unlicensed School Staff to Administer.</p>
	<p>6. Review individual student IHP/ECP, medication forms and instructions with trained staff. See sample forms: Prescription Long Term, Prescription Short Term, Non-prescription and student-specific IHP/ECP.</p>
	<p>7. Document nurse delegation. See form Medication Administration Delegation Plan.</p>
	<p>8. Evaluate the trained school staff person, using the mastery of skills checklists(s), on a regular basis. For medications delegated by the nurse, evaluate every 90 days per 12 AAC 44.960(c); for parent delegated medications, frequency should be determined by nursing judgment based on student/trainee needs. Maintain a record of the evaluations conducted. See form Medication Administration Delegation Plan.</p>
	<p>9. Evaluate student outcomes and adjust the IHP accordingly.</p>



🌀 FIELD TRIPS 🌀

The school nurse should address plans for school-sponsored activities and trips with the teacher, school administrator and parent(s)/guardian(s) of a student with special health care needs when developing the IHP and ECP. Encourage early dialogue for arrangements to be made in sufficient time prior to a trip or activity so that:

- ✓ The need for accommodations can be assessed,
- ✓ Adherence to the IHP can be ensured,
- ✓ Training of unlicensed school staff, if necessary, can be completed, and
- ✓ Proper emergency care for the student can be addressed.

✓	Steps for Delegation and Training
	<p>1. Collaborate with the parents, healthcare provider and school administrator to develop an <i>Individualized Healthcare Plan(IHP) and Emergency Care Plan (ECP)</i>,</p> <ul style="list-style-type: none"> • Obtain appropriate authorizations (i.e., parent signature for medication administration, procedure and care plan forms, healthcare provider orders), • Provide a nursing assessment of the student and his/her healthcare needs, and • Address how medication administration, including emergency medications, should occur on field trips.
	<p>2. Determine appropriate staff to administer medications – work with the administrator, parents, and, as needed, the healthcare provider; staff assigned must do so voluntarily.</p>
	<p>3. For nurse delegated medications, provide a focused training covering only the content needed for a singular event or short-term time period, specific to the individual student. This likely may include the following excerpts from the <i>Medication Administration: Guide for Training Unlicensed School Staff</i> :</p> <ul style="list-style-type: none"> • General Rules for Medication Administration (page 11) <ul style="list-style-type: none"> ○ Appropriate safety checks. Include how the medication will be secured while on the trip and how medication must be given only by the person trained. ○ Five rights of medication administration • General Steps for Medication Administration, those appropriate to the situation (page 14) • Specific medication route instructions (i.e., oral, ophthalmic, otic, intranasal, topical, inhaled found on pages 15-17), those appropriate to the situation • Review medication forms for time scheduled, side effects, storage instructions and where to document administration. See sample forms: <i>Prescription Long Term, Prescription Short Term, and Non-prescription.</i> • When and how to contact the school nurse, those appropriate to the situation (page 22) <p>For parent-delegated emergency medications, provide the appropriate training utilizing the <i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>.</p> <ul style="list-style-type: none"> ✓ Document the parent’s request to train the appropriate staff. See form <i>Medication Administration: Parental Request for Training Unlicensed School Staff to Administer.</i> ✓ Provide the specific training for the medication using the <i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i> ✓ Document the training and competency via the pre- and post-test and evaluation of mastery checklist (forms available per specific training).

	<ul style="list-style-type: none"> ✓ Document parent authorization for the trained school staff member(s) to administer the medication(s). See form <i>Medication Administration: Parental Authorization for Trained Unlicensed School Staff to Administer.</i> ✓ Review individual student IHP/ECP instructions with trained staff. See forms: student IHP/ECP. ✓ Regularly evaluate the need for further training by using the mastery of skills checklists(s) to determine continued competency. The frequency of evaluation is determined by using nursing judgment for student/trainee needs. <p>For diabetes skills, beyond administration of glucagon (see <i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>), train utilizing the <i>Diabetes Management: Guide for Training Unlicensed School Staff.</i></p>
	4. Document nurse delegation. See form <i>Medication Administration Delegation Plan.</i>
	5. Review and input the event documentation upon completion.
	6. Evaluate student outcomes and adjust the IHP accordingly.



🌀 Extracurricular, School-Sponsored Activities 🌀

A school sponsored activity is defined as: *academic, nonacademic and extracurricular activities that may include field trips, special interest groups or clubs, physical recreational athletics and other recreational activities sponsored by the school and/or school district. (34 CFR 104.34(b) and 104.37(a)(2))* To ensure that students with disabilities consistently have opportunities to participate in extracurricular programs and activities, the school has the responsibilities under Section 504 of the Rehabilitation Act of 1973 to make reasonable modifications and provide aids and services that are necessary. These services include access to needed health services for the student.

NOTE: organizations and clubs that meet after school in the school building but are not school-sponsored, such as Boy or Girl Scouts, are not considered extracurricular activities covered under Section 504.

✓	Steps for Delegation and Training	
	1.	<p>Collaborate with the parents, healthcare provider and school administrator to develop an Individualized Healthcare Plan(IHP) and Emergency Care Plan (ECP),</p> <ul style="list-style-type: none"> • Obtain appropriate authorizations (i.e., parent signature for medication administration, procedure and care plan forms, healthcare provider orders), • Provide a nursing assessment of the student and his/her healthcare needs, and • Address how medication administration should occur for school-sponsored extracurricular activities, should the student plan to participate in any. Discuss parent responsibility in notifying the school nurse at least 2 weeks prior to the commencement of the activity if medication is needed for an after- school activity.
	2.	<p>Work with the extracurricular activity coordinator to address specific student needs. When possible, the activity coordinator should request an extra medication supply from the parents for the activity. If this is not possible, set up a system by which the student may have access to the medication stored at school.*</p>
	3.	<p>Determine training needed using nursing judgment. Considerations include:</p> <ul style="list-style-type: none"> • Can the child self-administer the medication? How much supervision and assistance is needed? If a student has the approval by the parent and healthcare provider to self-administer the prescribed medication and nursing assessment verifies student abilities, minimal training of extracurricular staff may be necessary. • How frequent is the medication? Are there other medications the extracurricular staff will need to administer for different students? The more medications, the more students, the more frequent the medication(s) and the longer length of time the activity will continue, likely the best decision is to train using the entire content of the Medication Administration: Guide for Training Unlicensed School Staff. • Is the medication for anaphylaxis, diabetes or seizure emergencies? If so, and the parent requests the training for the responsible staff: <ul style="list-style-type: none"> ✓ Document the parent’s request to train the appropriate staff. See form Medication Administration: Parental Request for Training Unlicensed School Staff to Administer. ✓ Provide the specific training for the medication using the <i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i> ✓ Document the training and competency via the pre- and post-test and evaluation of mastery checklist (forms available per specific training).

	<ul style="list-style-type: none"> ✓ Document parent authorization for the trained school staff member(s) to administer the medication(s). See form Medication Administration: Parental Authorization for Trained Unlicensed School Staff to Administer. ✓ Review individual student IHP/ECP instructions with trained staff. See forms: student IHP/ECP. ✓ Regularly evaluate the need for further training by using the mastery of skills checklists(s) to determine continued competency. The frequency of evaluation is determined by using nursing judgment for student/trainee needs. <p>For diabetes skills, beyond administration of glucagon (see Emergency Medication Administration: Guide for Training Unlicensed School Staff), train utilizing the Diabetes Management: Guide for Training Unlicensed School Staff.</p>
4.	Evaluate student outcomes and adjust the IHP accordingly.

***SAMPLE SYSTEM FOR AFTER-SCHOOL ACCESS TO MEDICATIONS:**

1. The afterschool program coordinator for each school will identify the students that are participating in afterschool activities who have a documented medication need and list it on their afterschool program form.
2. A request will be made by the afterschool program coordinator to the parents/guardians of the identified students to provide an additional medication supply.
3. If medication is not provided for after school use, the nurse or designee will move the student's medication from nurse's office to a locked cabinet in the main office area that is accessible by the designated afterschool staff member.
4. The nurse or designee will retrieve the medication each morning before morning bell and restore the medication to its place in nurse's office.



FORMS INDEX

All guidelines and forms are available on the [Alaska Division of Public Health, School Nursing/School Health website](http://dhss.alaska.gov/dph/wcfh/Pages/school/resources.aspx#pubs) in Publications and Guidelines or Forms
(<http://dhss.alaska.gov/dph/wcfh/Pages/school/resources.aspx#pubs>).

FORMS (SAMPLE)	LOCATION
Individualized Healthcare Plans(IHP) and Emergency Care Plans (ECP)	
General IHP Sample	<i>Medication Administration Delegation Decision Tree Guidelines</i> OR in Forms
General ECP Sample	<i>Medication Administration Delegation Decision Tree Guidelines</i> OR in Forms
Sample Allergy/Anaphylaxis Care Plan	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i> OR in Forms
Alaska Diabetes Individualized Healthcare Plan	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i> OR <i>Diabetes Management: Guide for Training Unlicensed School Staff</i> OR in Forms
Student Asthma Action Card	In Forms
Seizure Action Plan	In Forms
Authorization Forms	
Sample Medication Administration: Parental Request for Training Unlicensed School Staff to Administer	<i>Medication Administration Delegation Decision Tree Guidelines</i>
Sample Parental Authorization for Trained Unlicensed School Staff to Administer	<i>Medication Administration Delegation Decision Tree Guidelines</i>
Sample Prescription Long Term form	<i>Medication Administration: Guide for Training Unlicensed School Staff</i> OR Forms
Sample Prescription Short Term	<i>Medication Administration: Guide for Training Unlicensed School Staff</i> OR Forms
Sample Non-prescription	<i>Medication Administration: Guide for Training Unlicensed School Staff</i> OR Forms
Parent Authorization for Medication Administration Assistance by Trained Unlicensed School Staff (Diabetes Tasks)	<i>Diabetes Management: Guide for Training Unlicensed School Staff</i>
Pre- and Post-Tests	
Sample Medication Administration Pre- and Post-Test	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Sample Pre-Post Test Anaphylaxis	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>
Sample Pre-Post Test Hypoglycemic Diabetes Emergency	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>
Sample Pre-Post Test Seizure Emergencies	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>

Evaluation of Mastery Skills Checklists	
Sample Medication Administration Evaluation of Mastery Checklist	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Sample Epinephrine Administration Checklist	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>
Sample Glucagon Administration Checklist	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff OR Diabetes Management: Guide for Training Unlicensed School Staff</i>
Sample Diazepam Rectal Gel Administration Checklist	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff</i>
Trainee Handouts	
Universal Precautions	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Confidentiality	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Low Blood Sugar (Hypoglycemia) Management	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff OR Diabetes Management: Guide for Training Unlicensed School Staff</i>
Glucagon Administration	<i>Emergency Medication Administration: Guide for Training Unlicensed School Staff OR Diabetes Management: Guide for Training Unlicensed School Staff</i>
Other Diabetes Trainee Handouts	<i>Diabetes Management: Guide for Training Unlicensed School Staff</i>
Training and Delegation - Miscellaneous Forms	
<i>List of Trained Unlicensed School Staff</i>	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
<i>Medication Administration Delegation Plan</i>	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Standard/Procedure for Delegation (Sample) -	<i>Medication Administration Delegation Decision Tree Guidelines OR Medication Administration: Model School Nursing Standard/Protocols</i>
<i>Medication Error Reporting Form</i>	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
<i>Medication Delegation Decision Tree</i>	<i>Medication Administration: Guide for Training Unlicensed School Staff</i>
Diabetes Management - Miscellaneous Forms	
<i>Agreement for Students Independently Managing Their Diabetes</i>	<i>Diabetes Management: Guide for Training Unlicensed School Staff</i>
<i>Unlicensed School Staff Agreement For Diabetes Care Tasks</i>	<i>Diabetes Management: Guide for Training Unlicensed School Staff</i>
<i>Training Assessments and Handouts</i>	<i>Diabetes Management: Guide for Training Unlicensed School Staff</i>