

**ORIENTATION CHECK LIST  
HEALTH SERVICES ASSISTANT  
A GUIDELINE CHECKLIST TO ASSIST HEALTH SERVICES ASSISTANTS IN COMPLETING THEIR  
ORIENTATION RESPONSIBILITIES**

\* Check off once successfully completed

I. **General/Employee Information**

- Evaluation
- Mileage
- Call Secretary to Director when out sick (before work or late the night before)
- Hours of employment
- Ordering supplies (school sites pay for Health Office supplies)
- Job Duties/Description
- Child Abuse Reporting-Mandated
- Manual Introduction
- Mandated Staff Meeting
- Map of District
- Emergency Card
- When to call school nurse and parents
- Medication forms/notebook
- Accident Reports
- Daily Log

II. **Understanding Chain of Command**

- Understanding when to call your site nurse for consultation or the designated Buddy nurse
- Nurse Specialist
- Director

III. **Immunizations**

- Review of Immunization requirements and waivers
- Make California Student Immunization Record (CSIR) "Blue Card"
- Review of students' health records
- Procedure for use in parent notification of required immunizations
  - Letter #1
  - Exclusion letter – after notifying principal
- Procedure for referral to Community Based Health Care Providers for Immunizations
- Immunization Forms:
  - Tracking immunizations
  - Kindergarten Immunization Audit

IV. **Enrollment Form - Health Folder**

- Review all yellow enrollment forms for illnesses, medications and allergies
- Emergency Cards (keep a working set); scan for illnesses, medications, etc.
- Make health folders for new students (include identification number)
- Put CSIR (blue immunization card) in student's health folder
- Update Health Concerns List from yellow enrollment forms and emergency card
- Review Health Folders (if enrolling from within PUSD, **DO NOT** make a new Health Folder); develop a system for tracking Health Folders of transferring students
- Make list of **NEW** students (**ALL** grade levels) for vision and hearing screening

SECTION 1

V. **Health Office Functions**

- \_\_\_\_\_ Develop method to triage students in health office
- \_\_\_\_\_ When to call your nurse for consultation or your buddy nurse
- \_\_\_\_\_ Student Accident Report (documentation) and tracking
- \_\_\_\_\_ Daily Log – Enter into Zangle under health office visits
- \_\_\_\_\_ First Aid Boxes (Sept./distribute, May/order supplies, June/clean and restock)
- \_\_\_\_\_ Teacher communications – referrals to nurse
- \_\_\_\_\_ Elementary: Health Cards
- \_\_\_\_\_ Communicable Diseases – policy – identification – parent notification – types of diseases, e.g. chicken pox
- \_\_\_\_\_ Temperature taking and recording
- \_\_\_\_\_ Field Trip Prep.with nurse(1<sup>st</sup> aid box & daily medications if required i.e. inhalers, Ritalin)
- \_\_\_\_\_ Medication Administration and notebook
  - \_\_\_\_\_ Procedure
  - \_\_\_\_\_ Storage
  - \_\_\_\_\_ Forms
  - \_\_\_\_\_ Identification of student
- \_\_\_\_\_ Monthly Reports
- \_\_\_\_\_ Annual Reports (tabulate: monthly reports, vision, hearing and scoliosis)
- \_\_\_\_\_ Reporting Suspected Child Abuse
  - \_\_\_\_\_ Legal responsibilities
  - \_\_\_\_\_ Confidentiality of forms
- \_\_\_\_\_ Student Attendance/Absences
  - \_\_\_\_\_ Long term
  - \_\_\_\_\_ Poor Attendance letter to parent from Health Office/Nurse
- \_\_\_\_\_ Vision/Hearing Testing (**Mandatory**)  
(Kinder/V&H, 2<sup>nd</sup> V/H, 5<sup>th</sup> V/H, 8<sup>th</sup> V/H, 10<sup>th</sup> V/H)
  - \_\_\_\_\_ *Prepare for group testing (include **NEW, ALL** grades and Sp. Ed.*
  - \_\_\_\_\_ Record on Health Folder
  - \_\_\_\_\_ Referral and follow-up
  - \_\_\_\_\_ Tally for Annual Report
- \_\_\_\_\_ Color Vision Testing (1<sup>st</sup> grade boys)
  - \_\_\_\_\_ Preparation
  - \_\_\_\_\_ Record and tally
- \_\_\_\_\_ Telephone Communication Skills
- \_\_\_\_\_ Scoliosis Screening (7<sup>th</sup> grade/girls, **and** 8<sup>th</sup> grade/boys)
  - \_\_\_\_\_ Letter to parents
  - \_\_\_\_\_ Record on Health Folder
  - \_\_\_\_\_ Annual Report
  - \_\_\_\_\_ Mandated Cost Log for above
- \_\_\_\_\_ Disaster Plan
  - \_\_\_\_\_ Student medication and Health Concerns List
  - \_\_\_\_\_ Responsibilities: Role in Disaster Plan
- \_\_\_\_\_ Transferring health records (i.e., promotion, purging, locating inactive files)
- \_\_\_\_\_ Personnel Activity Report (PARS) Time Log (Title 1)
- \_\_\_\_\_ Review Health Office – monthly activities

SECTION 1

VI. **Child Health And Disability Prevention (CHDP) Procedure**

**Physical Exams:**

- \_\_\_ Notification to 1<sup>st</sup> grade parents (sample packets)
- \_\_\_ Referral to Community Based Health Care Providers
- \_\_\_ Recording results and filing certificates
- \_\_\_ Notification to Kindergarten parents (sample packet)
- \_\_\_ 1<sup>st</sup> Grade Physical Exams/Waiver (time lines)
- \_\_\_ Obtaining Physical Exams for infants – 18 years
- \_\_\_ Nursing Services Monthly Mandated Cost Time Log: **Elementary** level only K-1)

VII. **Oral Health Assessment For All Kindergarteners**

- \_\_\_ Notification to Kindergarten parents
- \_\_\_ Keep list of oral assessments completed or signed waiver
- \_\_\_ Submit report - Due end of April

VIII. **Local Educational Agency (LEA) Medi-Cal Billing Procedure**

- \_\_\_ Purpose and procedure
- \_\_\_ Provider number
- \_\_\_ Billing form completion

IX. **Referral Services Within The Community**

**(See Resource Manual for assistance)**

- \_\_\_ Assist parents with appropriate referrals following your nurse's guidelines
- \_\_\_ Contact nurse or "buddy" for assistance with "sick" student
- \_\_\_ Familiarize yourself with Resource Manual
- \_\_\_ Communicate referrals to site nurse
- \_\_\_ Referral to Community Based Health Care Provider as needed