FileMaker Documentation for School Nurse Case Managers

When logging in to FileMaker, choose the current version (2017-18), then your ESD (171), then click on your name. The opening window will look like this:

The simplest way to navigate from student to student on your caseload is with these arrows.

If you continue to the right across the top, the record # indicates you are on the 2nd record out of 5 records that are yours out of a total 316 records being tracked by FileMaker.

When adding a student record, click "Add Record" and it will give you a blank new template that looks like this. It will automatically add your name as the "Advocate".

Demographics tab
Add the student's demographic data that you have access to from interviews and other student records like Skyward.

The "Program Enroll Date" would be the date that you enroll the student and would be identical to the "Current year enroll date" if the student is new this year. If the student was enrolled in previous years, then the dates will be different.

All pink shaded fields will auto-populate. For instance "Age at Enrollment" will automatically populate after you input "Date of Birth". "Exit date" is completed as the last date of the school year (June 30, 2018). If you exit them before that date, then change the date at that time.

The clip is a place to save "snips" of records pertinent to this student, i.e. signed referral form, emails to school staff or parents, medical records, letters to parents.

The symbol ❓ when clicked on will pop up a window with more information on how to complete the field.

After determining eligibility, click the appropriate circle.

Academics tab

Is completed only if appropriate to your student.

Form (Academics tab):

Last Name	First Name	County		171 ESD

lbrumfield

Advocate Name | School District | School | Grade

5927-1028 ☐ **Remove from 17-18 Database** | ◉ Active ○ Waiting List ○ Inactive

Tabs: Demographics | Academics | Referral | Assessment 1 | Assessment 2 | Tiers | Testing/Attend

Buttons: Add Record | Find Records | Sort | Case Notes | Contact List | Sign-In Sheet | Risk Assess | Print | ESD 171 Staff

Evidence

- Earned HS Credit ⊘
- Earned HS Diploma
- Enrolled in GED ⊘
- Enrolled Returned to School ⊘
- Obtained Work
- Enrolled in Juvenile Justice School ⊘

Referral tab

Refers to the referral of this student to the case management program. You will find this information on the referral form.

This is the only place for parent email which is sometimes the best way to contact a parent.

This data comes directly from the *Referral Form*.

Form (Referral tab):

Last Name	First Name	County		171 ESD

lbrumfield

Advocate Name | School District | School | Grade

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Name	Referral Date	Gender	Date of Birth

Parent Last Name	Parent First Name	Parent Email

Address	City	State	Zipcode

Parent Home Phone	Parent Cell Phone	Parent Work Phone	Teacher/Counselor/Advisor

AREAS OF CONCERNS (please check all that apply)

Referral Criteria (check at least one of the top 3 choices)

- ☐ Acute/chronic and/or life-threatening health condition
- ☐ Unmet health care need (Physical/Behavioral/Mental)
- ☐ Absenteeism
- ☐ Other (below)

Co-Morbid Factors (check all that apply)

- ☐ Chronic illness (Physical/Mental)
- ☐ Drug/alcohol Issues
- ☐ English Language Learner
- ☐ Poor Academic Performance
- ☐ Poverty/low income
- ☐ School re-entry
- ☐ Special Education
- ☐ Discipline referral
- ☐ Family Concerns
- ☐ High Mobility
- ☐ Homeless
- ☐ Other

Referred By | Referral Date

Office use only

Risk Criteria

	Continue	Stop - Does not qualify
Identified or suspected health condition?	○ Yes	○ No

	Yes				No
Is Health Condition managed or controlled?	○ 1	○ 2	○ 3	○ 4	○ 5

	Minor			Life-Threatening	
Is Health Condition Minor/Life Threatening?	○ 1	○ 2	○ 3	○ 4	○ 5

	None			Very Frequent	
Estimated required nursing intervention	○ 1	○ 2	○ 3	○ 4	○ 5

	0-4	5-9	10-14	15-17	18 or greater
Total absences (past calendar year)	○ 1	○ 2	○ 3	○ 4	○ 5

	None			Very Frequent	
Tardiness	○ 1	○ 2	○ 3	○ 4	○ 5
Missing assignments	○ 1	○ 2	○ 3	○ 4	○ 5
Off-Task in classroom* *observed by teacher or nurse	○ 1	○ 2	○ 3	○ 4	○ 5

Risk Assessment Total

Risk Criteria section

Complete this section according to your assessment. The pink shaded box at the bottom auto populates with the risk score and can help in prioritizing students for case management time.

Assessment 1 tab screenshot

| Demographics | Academics | Referral | **Assessment 1** | Assessment 2 | Tiers | Testing/Attend |

Case Notes
Contact List
Sign-In Sheet
Risk Assess
Print

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Known Diagnoses [_____]
Current Medications [_____]
Medical Home [_____] **Living Arrangement** [_____]
Current Plans ☐ IEP ☐ 504 Plan ☐ IHP/ECP ☐ Behavior Plan

[_____] [_____] ☐Initial ☐Annual
Assessment Start Date   Assessment Complete Date

Date of Last HCP Visit: [_____]

Number of ER Visits the year: [_____]   Date of Most Recent ER Visit: [_____]

Date of Most Recent Hospitalization: [_____]

Student Knowledge of Health Condition: ☐ None ☐ Little ☐ Some ☐ Thorough

Skill in Self-Managing Health Condition: ☐ None ☐ Little ☐ Some ☐ Thorough

[____] [____] [____] [____] [____] [____] [____]
Ht in Inches Weight BMI Temp Pulse Respiratory Blood Pressure

[____] [____] [____] [____] [____]
Head Neck Eyes Ears Teeth Heart Sounds

General Appearance [_____]

Skin Hair and Nails [_____]

[_____] [_____] [_____]
Breath Sounds Respiratory Efforts Abdomen

[_____] [_____] [_____]
Nutrition Arms Legs Hand Strength

Assessment 1 tab

Which sections you complete is determined by your nursing judgement and what health condition is qualifying them for case management.
There is an acknowledgement that the full assessment may take longer than one visit as you gain rapport and trust with students. Therefore "Assessment start" and "Assessment complete" fields are included.

Assessment 2 tab screenshot

| Demographics | Academics | Referral | Assessment 1 | **Assessment 2** | Tiers | Testing/Attend |

Case Notes
Contact List
Sign-In Sheet
Risk Assess
Print

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Date [_____]

Behavior Health Risks
(check all that apply)
☐ Mental Health Condition
☐ Substance Abuse (ATOD)
☐ Sexual Activity
☐ Disordered Eating
☐ Cutting or Self-harm
☐ Suicidal Ideation
☐ Other (below)

Impaired School/Social Function
(check all that apply)
☐ Behavior Issuses / Discipline referrals
☐ Suspended / Expelled
☐ Family Issues
☐ History of Academic Failure
☐ Truancy
☐ Stress Management
☐ Anger Management
☐ Bullied / Bully
☐ High Antisocial / Negative Peer Influence
☐ Other (below)

Family History
☐ Mental Health Condition(s)
☐ Substance Abuse (ATOD)
☐ Incarceration
☐ Other (below)

Strengths: (check all that apply or list specifics)

Belonging		Independence		Generosity	
Student	Nurse	Student	Nurse	Student	Nurse
☐ Family Support	☐	☐ Control of Actions	☐	☐ Share Time	☐
☐ Peer Support	☐	☐ Control of Thoughts	☐	☐ Share Things	☐
☐ Community Support	☐	☐ Control of Money	☐	☐ Share Respect	☐
☐ Pro-Social Activities	☐	☐ Control of Time	☐	☐ Share Understanding (Empathy)	☐
☐ ID 1 Caring Adult	☐	☐ Other (below)	☐	☐ Share Knowledge	☐
☐ Other (below)	☐			☐ Other (below)	☐

Strengths - Mastery

	Student	Nurse
Subject	[_____]	[_____]
Hobby	[_____]	[_____]
Talent	[_____]	[_____]
Other	[_____]	[_____]

Assessment 2 tab

A place for you to summarize the assessments you have identified.

Strengths
Review with student and identify where they believe their strengths lie and include your nursing assessment as well. These are documented in separate columns.

Refer to Circle of Courage model for more information

| Demographics | Academics | Referral | Assessment 1 | Assessment 2 | **Tiers** | Testing/Attend |

Tiers tab

Here is where you utilize the Public Health model of care required based on your acuity assessment. Student's Tier can change as case management progresses, either higher or lower (desired).

☐ **Tier 1**

* Brief Assessment

* Information Only

* Referral Only

☐ **Tier 2**

* Assessment

* Home Visit

* Care Planning

* Student/Staff/Family Education

* Access to health insurance or healthcare

☐ **Tier 3**

* Intensive Case Management

* Promote student self management

* Liaison with other agencies

* Parent Support for IEP/504/Behavior Plans

* Care Planning/Complex Health Needs

Case Notes
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| Demographics | Academics | Referral | Assessment 1 | Assessment 2 | Tiers | **Testing/Attend** |

Testing and Attendance tab

This tab will be managed by Todd Johnson.

Nursing's role is to assure MAP testing (Measure of Academic Progress) is done each school year. Students should be tested twice each year and at least 90 days apart. This is one of the data points by which we measure the effectiveness of the Nurse Case Management program.

Math Results

Pre Math	Not Tested
Post Math	Not Tested
Change in Math Score	

	Date Pre Test	Pre Score	%	Date Post Test	Post Score	%
2012-13 School Year						
2013-14 School Year						
2014-15 School Year						
2015-16 School Year						
2016-17 School Year						
2017-18 School Year						
2018-19 School Year						

Reading Results

Pre Read	Not Tested
Post Read	Not Tested
Change in Read Score	

	Date Pre Test	Pre Score	%	Date Post Test	Post Score	%
2012-13 School Year						
2013-14 School Year						
2014-15 School Year						
2015-16 School Year						
2016-17 School Year						
2017-18 School Year						
2018-19 School Year						

Case Notes
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Absences

Total Absences 2011-12	
Total Absences 2012-13	
Total Absences 2013-14	
Total Absences 2014-15	
Total Absences 2015-16	
Total Absences 2016-17	
Total Absences 2017-18	
Total Absences 2018-19	

Todd's Export Todd Only!

Todd will access and inpput this data independent of nursing.

Add a Case Note   Print Notes   Previous   Next   Sort

Date   Time Spent   Advocate

Intervention   Note Number
☐ Assessment

Contact Type
☐ Phone
☐ School Visit
☐ Home Visit
☐ Community Based Activity/Appointment
☐ Records Review
☐ Care Coordination Activity
☐ Other

Care Planning
☐ IHP
☐ ECP
☐ 504
☐ IEP
☐ Other

Notes

Health/Social Referral
☐ Insurance
☐ Mental Health
☐ Medical
☐ Dental
☐ Chem. Depend.
☐ Basic Needs (food, housing)
☐ Other

Health Education Intervention
☐ Student
☐ Family
☐ School Staff

Plan/Goals

Academic Referral
☐ Extended Day
☐ Tutoring
☐ Mentoring
☐ Other

Priority Concern(s) Addressed Today

Priorities Worked Today

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Case Notes

Case notes are accessed by the vertical list of buttons on the right side of the screen. Case notes are to document each interaction with student, family and school staff.

One can add a new case note by either clicking on "Add a Case Note" or scrolling down and a new blank template will appear. No matter how you add a case note they are organized with the newest one at the top.

All appropriate fields must be entered as these are data points that are gathered for the program evaluation.

Start at the top by entering the date of the interaction, time spent and your name. Then Contact Type, Care Planning, Referrals, Health Education and Academic Referrals. You may check more than one box in each field.

Notes
Details of your interaction.

Plan/Goals
Next steps that you develop with the student.

Priorities Worked Today
The first Case Note is where you initiate these priorities by clicking on the "Priorities Worked Today" button. They come out of your assessment and are agreed on with the student. Each time you write a Case Note you will click on this button and your previously entered priorities will be there and you click on each one and it will show up in the "Priorities Concerns Addressed Today" as a list.

Sample case note:

1/8/2018	0:45	lbrumfield
Date	Time Spent	Advocate

Intervention Note Number

☐ Assessment

Contact Type

☐ Phone ☐ Records Review
☒ School Visit ☒ Care Coordination Activity
☐ Home Visit ☐ Other
☒ Community Based Activity/Appointment

Care Planning

☐ IHP
☐ ECP
☐ 504
☐ IEP
☐ Other

Notes

was eager for nurse to meet mother so nurse took student home at end of day. Mother wasn't at home but found her at community computer center. She was crying pretty hard and apologized. Nurse told her she wanted to help ge   an optometry appointment and well child check to evaluate for asthma and need for medication. Mother agreed. Nurse offered to pick mother up and join in appointment
Students have health insurance.
Mother concerned that they are running out of wood for heat. They have food, but no water or electricity. She likes the community but does not qualify for many resources because she is not tribal.
They do have health insurance through Medicaid

Health/Social Referral

☒ Insurance
☐ Mental Health
☒ Medical
☐ Dental
☐ Chem. Depend.
☒ Basic Needs (food, housing)
☐ Other

Plan/Goals

Mother requested appointment be made for son   as well.
Nurse will call in the next week and let mom know the date--using email:
      gmail.com

Health Education Intervention

☐ Student
☒ Family
☐ School Staff

Academic Referral

☐ Extended Day
☐ Tutoring
☐ Mentoring
☐ Other

Priority Concern(s) Addressed Today

Poverty-Lack of basic needs at home--water and electricity
Needs eye exam and probably glasses
Needs asthma assessment and well child exam   Lightshot Screenshot