



# **ADMINISTRATIVE PROCEDURE**

CATEGORY: **Student, Records**  
SUBJECT: **Health Records**

NO: **6515**  
PAGE: **1 OF 7**  
EFFECTIVE: **1-29-62**  
REVISED: **12-10-10**

## **A. PURPOSE AND SCOPE**

1. To outline administrative procedures governing the initiation and maintenance of student health records in schools.
2. **Related Procedures:**

Cumulative record keeping, K-6 .....	6505
Cumulative record keeping, 7-12 .....	6510
Student records, retention and destruction .....	6520
Release of directory-type student information .....	6525
Transfer and withdrawal, K-6 .....	6145
Transfer and withdrawal, 7-12 .....	6146

## **B. LEGAL AND POLICY BASIS**

1. **Reference:** Board Policy: H-7400, H-7600, H-8900; Education Code Sections 49062, 49400, 49426, 49451; California Code of Regulations, Title 5, Sections 16020-16030.

## **C. GENERAL**

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Nursing and Wellness Department, Student Services Division.
2. **Student Health Records**
  - a. **Contents.** Health records include the “California School Immunization Record” (CSIR) (prior to 2010), “Student Health Record,” “Student Health Record Insert Sheet,” “Health Examination Request,” “Health History,” and “Health Exchange Information Consent.” The parent/guardian completes the “Health History,” and the examining physician completes the “Health Examination Request” if required. Additional forms are used by school nurses, health technicians and assistants, and office clerical staff for communicating with parents and for scheduling health programs.
  - b. **Record maintenance.** Student health records are classified as part of a student’s cumulative record. The “Student Health Record” and “California School Immunization Record” (CSIR) are *permanent* health records and are filed with permanent cumulative records when a student transfers from a school. Other health records may be kept in the health office, along with the “Student Health Record,” or in a confidential “Health Profile Envelope” within the cumulative record while the student is still in attendance. These records are

considered *mandatory interim* records and must be kept for at least three (3) years after the student is no longer enrolled in the district. They should not be purged from the student's cumulative record without first consulting with the site school nurse or Nursing and Wellness Program Office (Procedures 6505, 6510 and 6520). Students entering the district beginning with the 2010-2011 school year will not have a CSIR. Their "permanent" school immunization record will be in the "San Diego Immunization Record" (SDIR).

(1) **Filing records**

(a) *K-12* health records and Special Education Early Childhood health records are kept in the health office at each school; *child development center/state preschool* health records are kept at the Early Childhood Education Program Office.

(b) Questions regarding records stored at Revere Center should be directed to 858-496-8201.

(2) **Recording entries.** Notations on the "Student Health Record" and "Health History" forms must be made with thermo-reproducing ballpoint pens or typed in black to ensure clear photocopies.

3. **Critical Health Problems**

a. **Criteria for identification** include serious, handicapping, or uncorrected health problems that may affect learning or participation in school activities, or that may require sudden immediate first aid.

b. **School nurse** shall ensure that an entry is made on the student's health record when supporting documentation is received and notify appropriate teachers, administrators and other school staff with a "need to know." School nurse will add any health concerns for any new student into Zangle or the current district student information system health component, marking them as "confidential."

4. **Record of Examinations.** Examinations done at individual school sites, by the student's private physician, or at community clinics become part of the student's health record, once released to the school by the health care provider or parent. State and federal laws regarding the exchange of health and student records must be followed whenever health records are exchanged between the district and outside agencies and health care providers.

**D. IMPLEMENTATION**

1. **Entering students, K-12**

- a. **Student entering from out of district. School secretary, clerk, registrar, health technician or health assistant:**
- (1) Secures completed “Health History” and “Health Exchange Information Consent” forms from person enrolling student.
  - (2) Checks for student immunization record in the “San Diego Immunization Record” (SDIR). If all immunizations are in SDIR and are up to date for age/grade, nothing else is needed. If incomplete, copies the student’s immunization record or prints it out from SDIR and notifies the parent or guardian which immunizations are needed either prior to attendance or by what date. If immunization records are not already in SDIR, copies the immunization record or enters it directly into SDIR and has parent complete the form titled “CAIR Immunization records are online!” Initials and dates CAIR form where indicated under the label “Office Use Only.” If the parent wants the SDIR records to be available to their doctor, themselves, or future school districts, they should not initial the box on the bottom of the form. Students without immunization records who are new to the United States must receive at least one dose of all required vaccinations for their age/grade prior to attending school. They can be referred to the nearest health department or community clinic for vaccination.
  - (3) Secures exemption statement from persons whose religious faith prohibits health services. If such beliefs also prohibit immunizations, obtains the parent’s signature on the Personal Beliefs Exemption section on the back of the “California School Immunization Record” (CSIR) blue card. This is the only time the CSIR card is to be used for newly enrolling students. A medical exemption, verified in writing by a physician, is also recorded on the CSIR card. All personal belief exemptions (PBE) and medical exemptions (ME) are also entered into SDIR and the parent must still complete the CAIR form. Prepares and maintains a list of all PBE/ME exemptions and submits annually or more often to the Nursing and Wellness Office.
  - (4) As directed by the school nurse, issues “Health Examination Request” or another exam report form to person enrolling student; requests that a medical examination be reported to the school at convenience of parent/guardian (mandated for entry into first grade).
  - (5) Initiates a “Student Health Record,” may attach “Health History” card (preferably with magic mending tape).

- (6) Inputs immunization data not already entered into the “San Diego Immunization Registry” (SDIR).
- (7) Gives “Student Health Record,” “Health History,” CAIR form and copy of immunization records to school nurse and informs nurse of students with incomplete immunization verifications.

**b. Student entering from another district school. School secretary, clerk, registrar, health technician or health assistant:**

- (1) Secures health records, cumulative record, and CSIR (if available) from school of transfer or last district school attended or Early Childhood Education Program. Verifies immunization records in SDIR to ensure current completion and compliance with age/grade level requirements. Notifies parent or guardian of any incomplete or missing immunizations required since previous enrollment.
- (2) Delivers incomplete immunization status information to nurse, if applicable. May print out a copy of the SDIR “Patient Immunization Record” to show which vaccines are missing or recommended.
- (3) Forwards “Student Health Record” and CSIR (if available) to school nurse.

**c. All entering students. School nurse:**

- (1) Files health record, with “Health History” attached, in school health office. Initiates a “Temporary Health Record” only if necessary or if previous school records are known to be forthcoming. (May be done by health technician or health assistant under direction of school nurse).
- (2) Records results of any observations, reports, and significant contacts with student on “Student Health Record” and into Zangle, or current district electronic student information system.
- (3) Makes entry on health record when supporting documentation of a critical health problem is received; notifies appropriate teachers, administrators and other staff and discusses appropriate medical recommendations, treatments or medications necessary during the school day.
- (4) Prepares a hand written or electronic list of names of students with critical health problems and students in need of examinations other than routine screening (may be assisted by a health technician or health assistant, if available).

- (5) Files exemption statements with health records; notifies teacher, principal, secretary and Nursing and Wellness Program Office of any personal belief or medical immunization exemptions, if not already done, and maintains a current list of all PBE/ME exemptions in the health office, accessible to appropriate site or district staff in the event of an outbreak.
- (6) Gives CSIR, CAIR form, copy of immunizations, if present, and any other health information not needed in the health office to secretary to file in student cumulative record folder. A “Health Profile Envelope” should be used for any confidential health or medical records.
- (7) Signs New Student Enrollment Form for secondary students, if appropriate.

2. **Transferring/Articulating Students, K–6** (Procedures 6145 and 6525)

- a. **School nurse** brings “Student Health Record,” Zangle (or current student information system) and SDIR electronic immunization record up to date; gives “Student Health Record” and any other health files kept in the health office to school secretary/clerk to be sent with cumulative record.
- b. **School secretary or clerk** attaches (staples to inside folder) “Student Health Record” to cumulative student record; maintains file until requested by receiving school.

3. **Transferring/Articulating Students, 7–12** (Procedures 6146 and 6525)

- a. **School nurse**
  - (1) Notes transfer on student’s schedule of classes, transfer form, and/or in the electronic health record.
  - (2) Brings “Student Health Record,” Zangle (or current student information system) and SDIR electronic immunization record up to date; gives “Student Health Record” and any other health files kept in the health office to school clerk.
- b. **School clerk or registrar** attaches (staples to inside folder) “Student Health Record” to cumulative student record; maintains file until requested by receiving school.

**4. Graduating Students** (Completion of High School)**a. High school nurse**

- (1) Brings “Student Health Record,” Zangle (or current student information system) and SDIR electronic immunization record up to date; gives to school clerk or registrar for filing after graduation.
- (2) Upon student’s request, instructs clerk to provide student with copy of his/her immunization record from SDIR. (Parent or student can also access these records on their own).

- b. School clerk** attaches “Student Health Record” to cumulative student record; files in “inactive” file.

**E. FORMS AND AUXILIARY REFERENCE**

1. Student Health Record, Stock Item 22-H-1205
2. Student Health Record Insert Sheet, Stock Item 22-H-1206
3. Health History, Stock Item 22-H-0710; Spanish, 22-H-0711
4. Health Examination Request, Stock Item 22-H-0700; Spanish, 22-H-0701
5. California School Immunization Record (CSIR), Stock Item 63-P-0286
6. Health Exchange Information Consent, Stock Item 22-H-0714
7. Health Profile Envelope, Stock Item 22-H-0717
8. CAIR Immunization Records are Online! form, HHSA:IZ148ES-SDUSD 03/10

**F. REPORTS AND RECORDS**

1. **At the beginning of each school year (by October 1) and periodically thereafter,** school nurse sends notice of critical health problems to teachers, delivers critical health problem lists to teachers, or arranges to meet with teachers regarding specific student health concerns, unless parent has specifically requested that information not be shared with school staff.

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NO: **6515**

PAGE: **7 OF 7**

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2. **Student Health Record and CSIR** (if available for students enrolled prior to 2010-2011 school year) retained as permanent records to be attached to and included with permanent cumulative student records. Beginning with the 2010-2011 school year, immunization records of all newly enrolled students are recorded only in the “San Diego Immunization Registry” (SDIR), which can subsequently be accessed by other schools, doctors, parents or the students themselves, so there is no longer a need to maintain CSIR cards as part of the permanent school record unless the Personal Beliefs Exemption (PBE) has been signed by the parent or there is documentation from the physician for a Medical Exemption (ME) from immunization.

**G. APPROVED BY**

A handwritten signature in black ink, consisting of several loops and a long horizontal stroke extending to the right.

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Interim General Counsel, Legal Services  
San Diego Unified School District