

ERP Chronicle Walkthrough Guide

Module 1: Creating and Managing Patient Records

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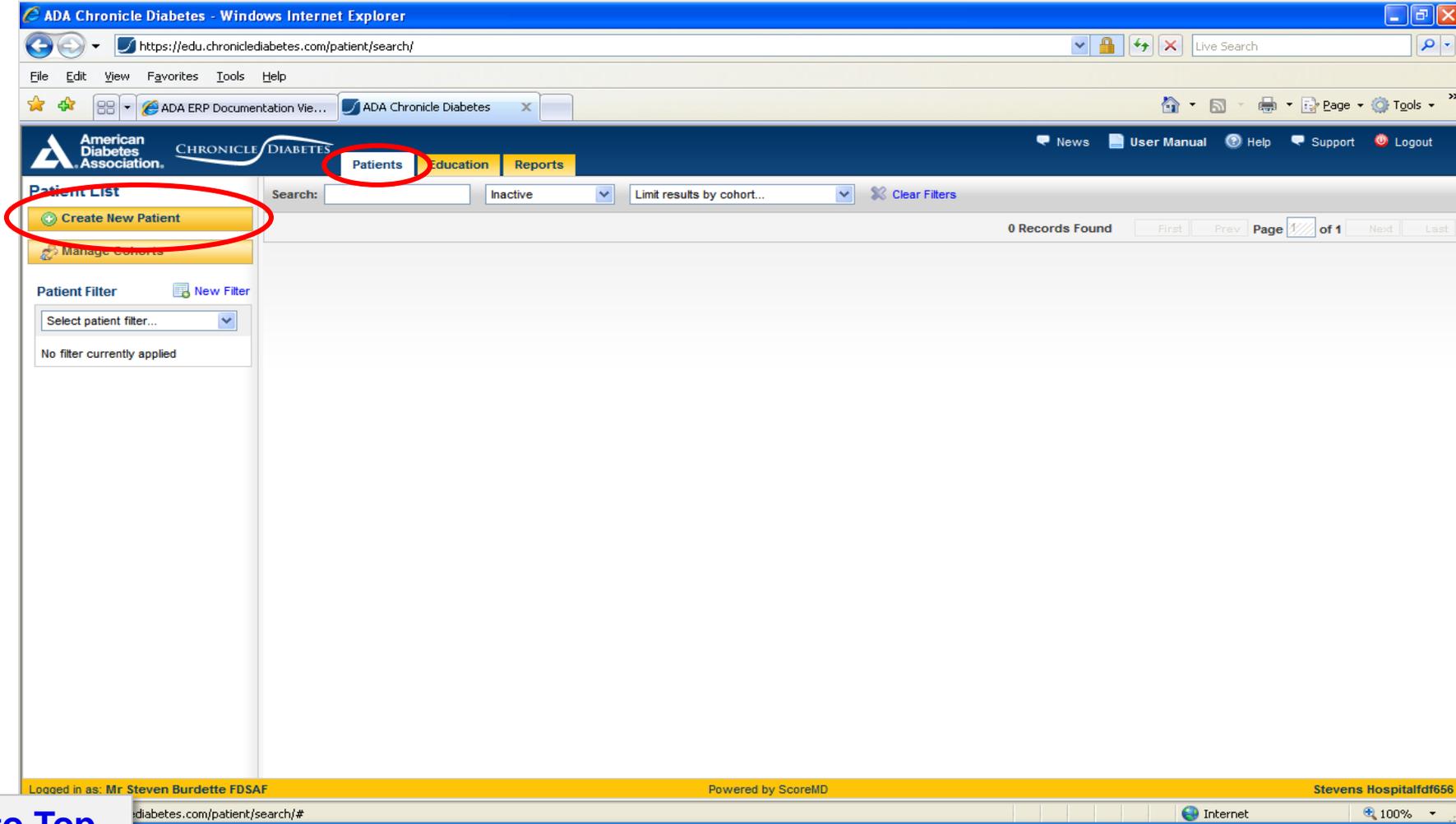
A. Creating and Editing Letters with the Letter Manager

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Module 1: Creating and Managing Patient Records

Creating a new patient Record *Page 1 of 3*

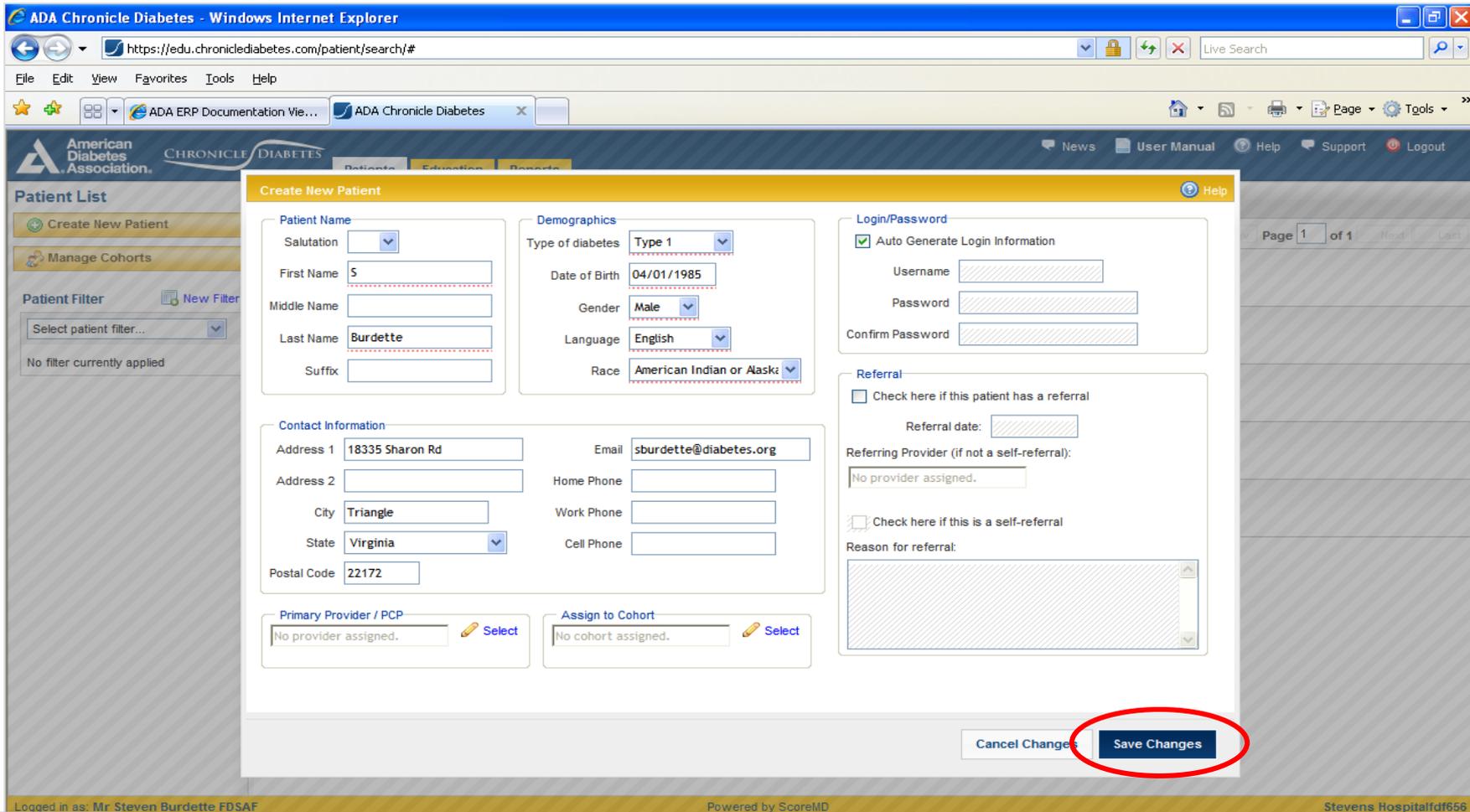
- 1) Click on the **Patients** tab at the top of the page, and then the **Create New Patient** button.



The screenshot displays the ADA Chronicle Diabetes patient management system. The browser window title is "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chronicdiabetes.com/patient/search/". The navigation menu includes "Patients", "Education", and "Reports", with "Patients" highlighted. The "Patient LIST" section features a search bar, a dropdown menu set to "Inactive", and a "Limit results by cohort..." dropdown. A "Create New Patient" button is prominently displayed and circled in red. Below the search bar, there is a "Patient Filter" section with a "New Filter" button and a dropdown menu labeled "Select patient filter...". The status bar at the bottom indicates the user is logged in as "Mr Steven Burdette FDSAF" and the system is powered by ScoreMD. The footer also shows "Stevens Hospitaldf656" and "Internet" with a 100% zoom level.

Creating a new patient Record *Page 2 of 3*

- 2) Fill in as much information as you have. Fields marked with a red dotted line under the field are required. Click **Save Changes**.



The screenshot shows a web browser window displaying the ADA Chronicle Diabetes patient creation form. The form is titled "Create New Patient" and is divided into several sections:

- Patient Name:** Salutation (dropdown), First Name (S), Middle Name, Last Name (Burdette), Suffix.
- Demographics:** Type of diabetes (Type 1), Date of Birth (04/01/1985), Gender (Male), Language (English), Race (American Indian or Alaski).
- Login/Password:** Auto Generate Login Information, Username, Password, Confirm Password.
- Contact Information:** Address 1 (18335 Sharon Rd), Address 2, City (Triangle), State (Virginia), Postal Code (22172), Email (sburdette@diabetes.org), Home Phone, Work Phone, Cell Phone.
- Referral:** Check here if this patient has a referral, Referral date, Referring Provider (if not a self-referral): No provider assigned., Check here if this is a self-referral, Reason for referral.
- Primary Provider / PCP:** No provider assigned. [Select](#)
- Assign to Cohort:** No cohort assigned. [Select](#)

At the bottom right of the form, there are two buttons: "Cancel Changes" and "Save Changes". The "Save Changes" button is circled in red.

Creating a new patient Record Page 3 of 3

You will now be on the General Information page of the patient's record. You can view the various pages of the patient record by clicking the tabs on the left side of the page (e.g. DSME Assessment, Health Status, etc.)

The screenshot shows a web browser window displaying the ADA Chronicle Diabetes patient record for Steven Burdette. The browser title is "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chronicdiabetes.com/patient/detail/40756/". The page has a blue header with the ADA logo and navigation tabs for "Patients", "Education", and "Reports". On the right side of the header, there are links for "News", "User Manual", "Help", "Support", and "Logout".

The main content area is divided into several sections:

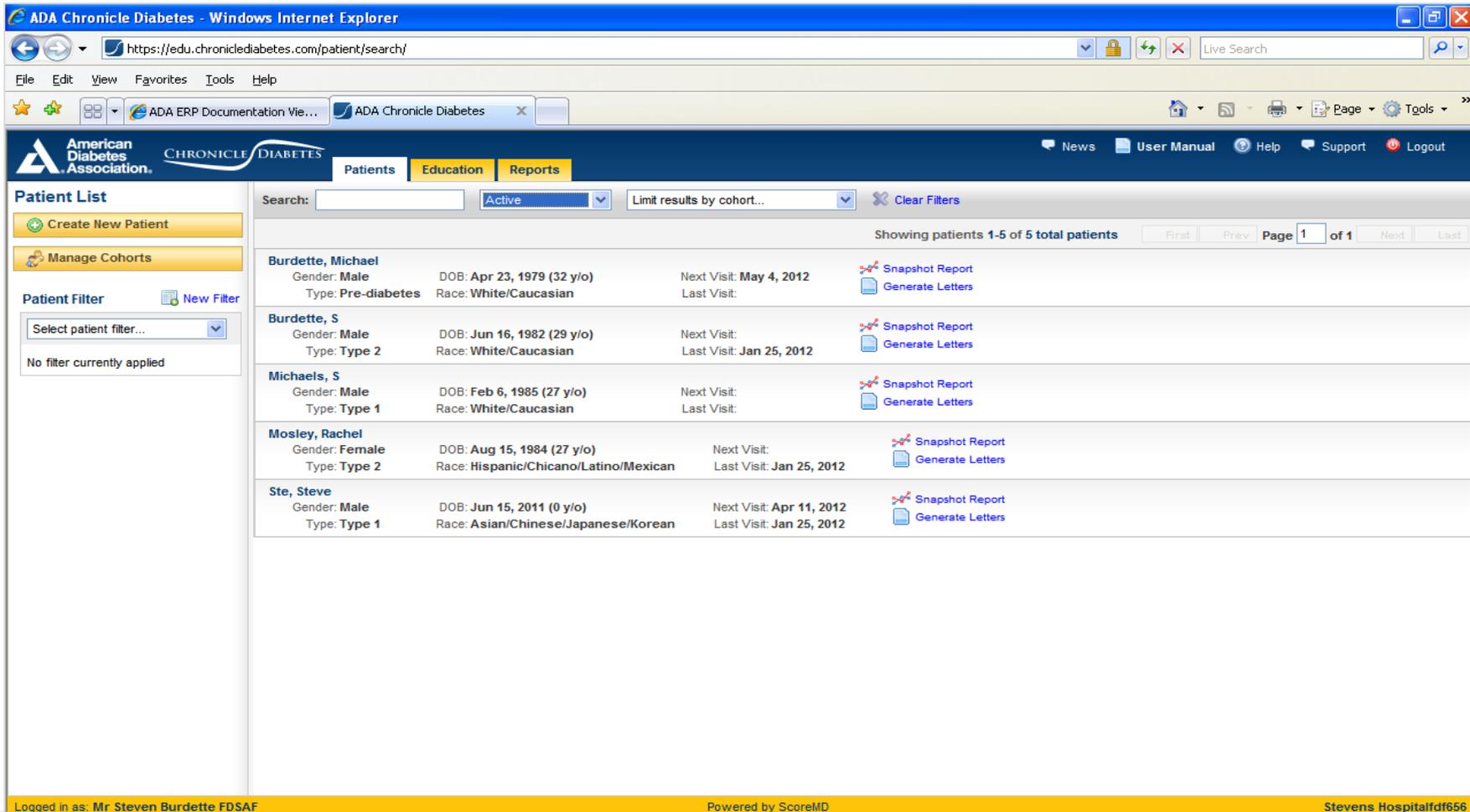
- Navigation:** A yellow button labeled "<<< Return to Patient List" is at the top left. On the right, there are links for "Print Current Page", "Print All Pages", and "Delete this patient".
- Patient Information:** A summary box showing: Gender: Male, DOB: Apr 1, 1985 (27 years old), Diabetes type: Type 1, Email: sburdette@diabetes.org, Race/ethnicity: American Indian or Alaskan Native, and BMI: (blank). Home phone: (blank).
- General Information:** A section with an "Edit" button. It contains:
 - Patient Name / ID:** S Burdette, Patient ID: No value, Medicaid ID: No value, Status: Active, Chronicle ID (internal): 40756.
 - Demographics:** Date of Birth: Apr 1, 1985 (27 yrs. old), Gender: Male, Race: American Indian or Alaskan Native, Occupation: No value, Language: English, Education: No value.
 - Referrals:** No referrals assigned. Add Referral button.
 - Education Summary:** New 1:1 button.
 - Health Insurance Information:** Has Insurance: No value, Primary Insurance: No value, Primary Insurance ID: No value, Primary Insurance Group: No value, This Primary Insurance is a Medicare Product: No value, Secondary Insurance: No value.
- Login Information:** A section with an "Edit" button. It contains:
 - Web Login:** Username: sburdette40756, Password: *****.
 - Touchscreen Login:** Pin Code: 40756, Year of Birth: 1985.
- Contact Information:** A section with an "Edit" button. It contains:
 - Address 1: 18335 Sharon Rd
 - Address 2: No value
 - City: Triangle
 - State: VA
 - Postal Code: 22172
 - Email: sburdette@diabetes.org

On the left side, there is a vertical navigation menu with tabs for "Patient Information", "General Information", "DSME Assessment", "Health Status", "Behavior Change Objectives", "Clinical and Lab Data", "Medications", "Contact History", "Notes", "Patient Reports", and "Generate Letters". Under "Patient Reports", there is a "Snapshot Report" dropdown and a "Click to generate selected report" button. Under "Generate Letters", there is a "Default - Welcome Letter" dropdown, a "Click to generate selected letter" button, and a "Launch Letter Manager" button.

At the bottom of the page, there is a yellow footer with the text "Steven Burdette FDSAF", "Powered by ScoreMD", and "Stevens Hospitaldf656". The browser's status bar at the very bottom shows "Internet" and "100%" zoom.

Viewing other patients *Page 1 of 2*

1. Click the Return to Patient List button in the upper left. **Note** that the patient that you just added is listed in the patients table. If you do not see the patient you can search for them by typing their last name in the search box and hitting return.



ADA Chronicle Diabetes - Windows Internet Explorer
 https://edu.chronicdiabetes.com/patient/search/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES

News User Manual Help Support Logout

Patients Education Reports

Patient List

Create New Patient

Manage Cohorts

Patient Filter [New Filter](#)

Select patient filter...
 No filter currently applied

Search: Active Limit results by cohort... Clear Filters

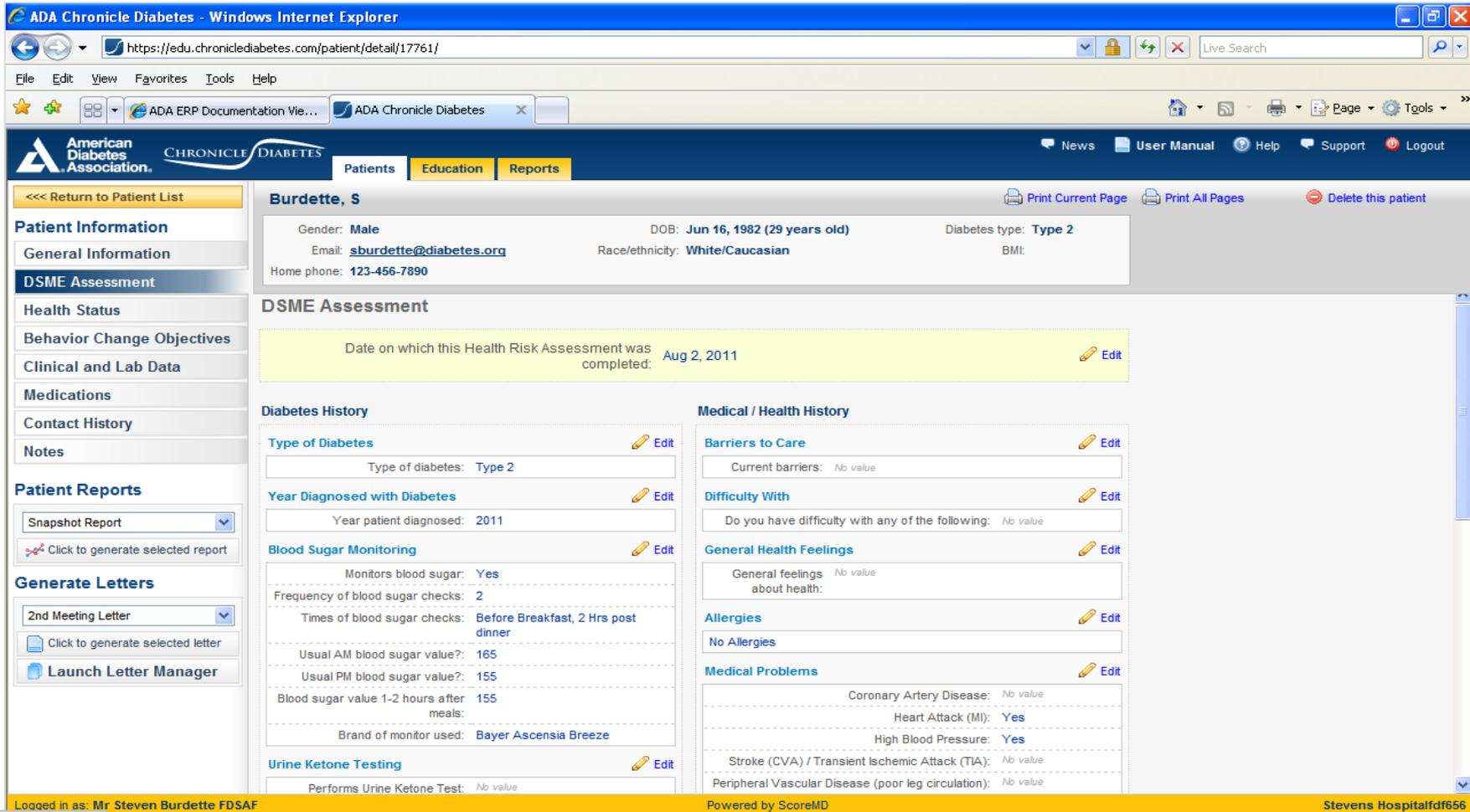
Showing patients 1-5 of 5 total patients

Burdette, Michael Gender: Male Type: Pre-diabetes	DOB: Apr 23, 1979 (32 y/o) Race: White/Caucasian	Next Visit: May 4, 2012 Last Visit:	Snapshot Report Generate Letters
Burdette, S Gender: Male Type: Type 2	DOB: Jun 16, 1982 (29 y/o) Race: White/Caucasian	Next Visit: Last Visit: Jan 25, 2012	Snapshot Report Generate Letters
Michaels, S Gender: Male Type: Type 1	DOB: Feb 6, 1985 (27 y/o) Race: White/Caucasian	Next Visit: Last Visit:	Snapshot Report Generate Letters
Mosley, Rachel Gender: Female Type: Type 2	DOB: Aug 15, 1984 (27 y/o) Race: Hispanic/Chicano/Latino/Mexican	Next Visit: Last Visit: Jan 25, 2012	Snapshot Report Generate Letters
Ste, Steve Gender: Male Type: Type 1	DOB: Jun 15, 2011 (0 y/o) Race: Asian/Chinese/Japanese/Korean	Next Visit: Apr 11, 2012 Last Visit: Jan 25, 2012	Snapshot Report Generate Letters

Logged in as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf656

Viewing other patients *Page 2 of 2*

- Click on a patient's listing to open the patient's record. You will be on the General Information page of the patient's record. You can view the various pages of the patient record by clicking the tabs on the left side of the page (e.g. DSME Assessment, Health Status, etc.)



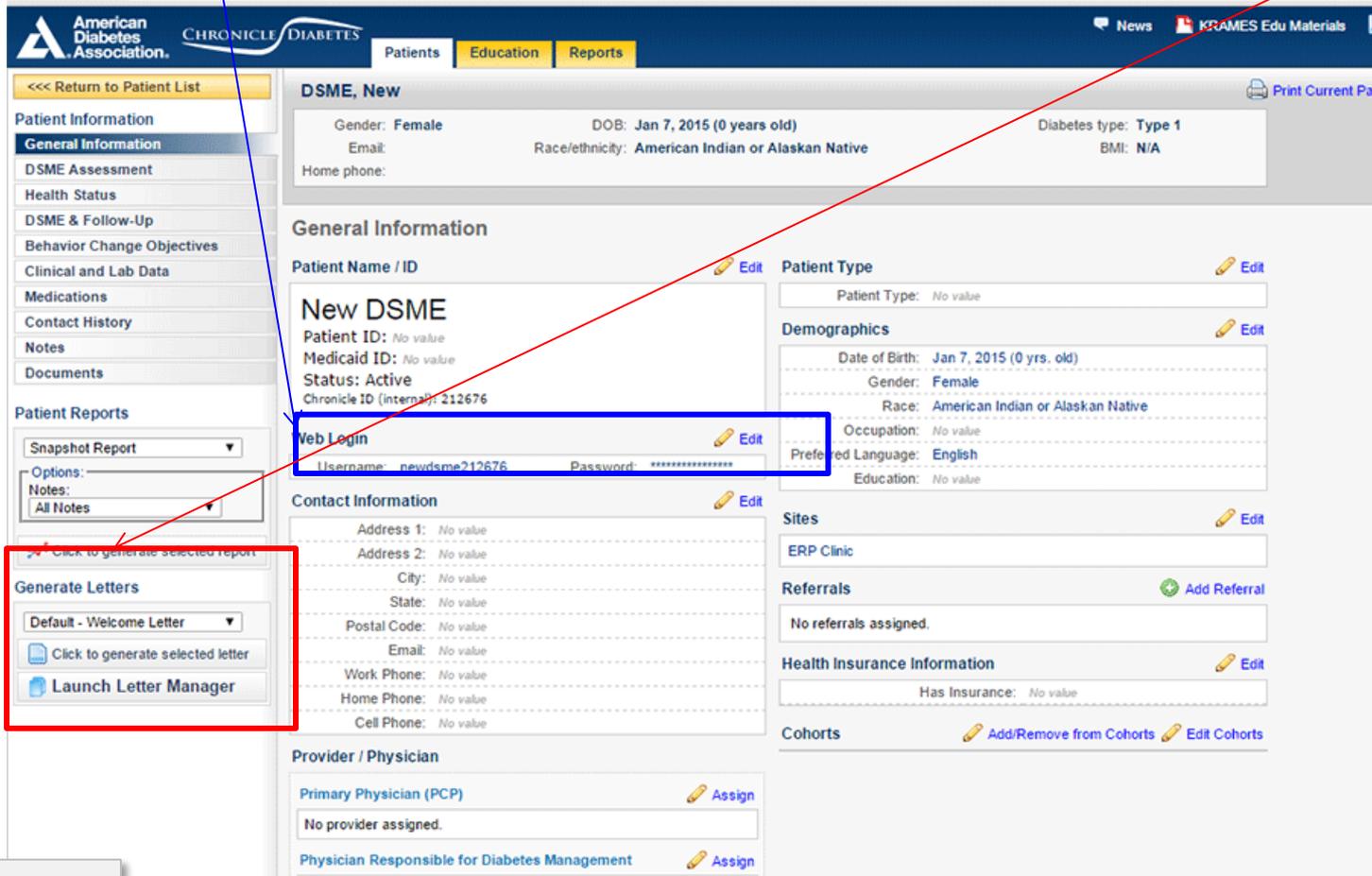
The screenshot shows a web browser window displaying the ADA Chronicle Diabetes patient record for Steven Burdette, S. The browser title is "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chronicdiabetes.com/patient/detail/17761/". The page features a navigation menu on the left with tabs for "Patients", "Education", and "Reports". The main content area is divided into several sections:

- Patient Information:**
 - Gender: Male
 - DOB: Jun 16, 1982 (29 years old)
 - Diabetes type: Type 2
 - Email: sburdette@diabetes.org
 - Race/ethnicity: White/Caucasian
 - BMI:
 - Home phone: 123-456-7890
- DSME Assessment:**
 - Date on which this Health Risk Assessment was completed: Aug 2, 2011
- Diabetes History:**
 - Type of Diabetes: Type 2
 - Year Diagnosed with Diabetes: 2011
 - Blood Sugar Monitoring:
 - Monitors blood sugar: Yes
 - Frequency of blood sugar checks: 2
 - Times of blood sugar checks: Before Breakfast, 2 Hrs post dinner
 - Usual AM blood sugar value?: 165
 - Usual PM blood sugar value?: 155
 - Blood sugar value 1-2 hours after meals: 155
 - Brand of monitor used: Bayer Ascensia Breeze
 - Urine Ketone Testing: Performs Urine Ketone Test: No value
- Medical / Health History:**
 - Barriers to Care: Current barriers: No value
 - Difficulty With: Do you have difficulty with any of the following: No value
 - General Health Feelings: General feelings about health: No value
 - Allergies: No Allergies
 - Medical Problems:
 - Coronary Artery Disease: No value
 - Heart Attack (MI): Yes
 - High Blood Pressure: Yes
 - Stroke (CVA) / Transient Ischemic Attack (TIA): No value
 - Peripheral Vascular Disease (poor leg circulation): No value

The footer of the page indicates the user is logged in as "Mr Steven Burdette FDSAF" and the system is powered by ScoreMD. The page is from Stevens Hospital/df656.

Online Patient Self-Assessment

When a patient record is created in Chronicle, the system automatically sets up a **username and password** for the patient to complete their assessment. The login credentials for the online patient self-assessment are included in the default **Welcome Letter** discussed in **Module 3**.



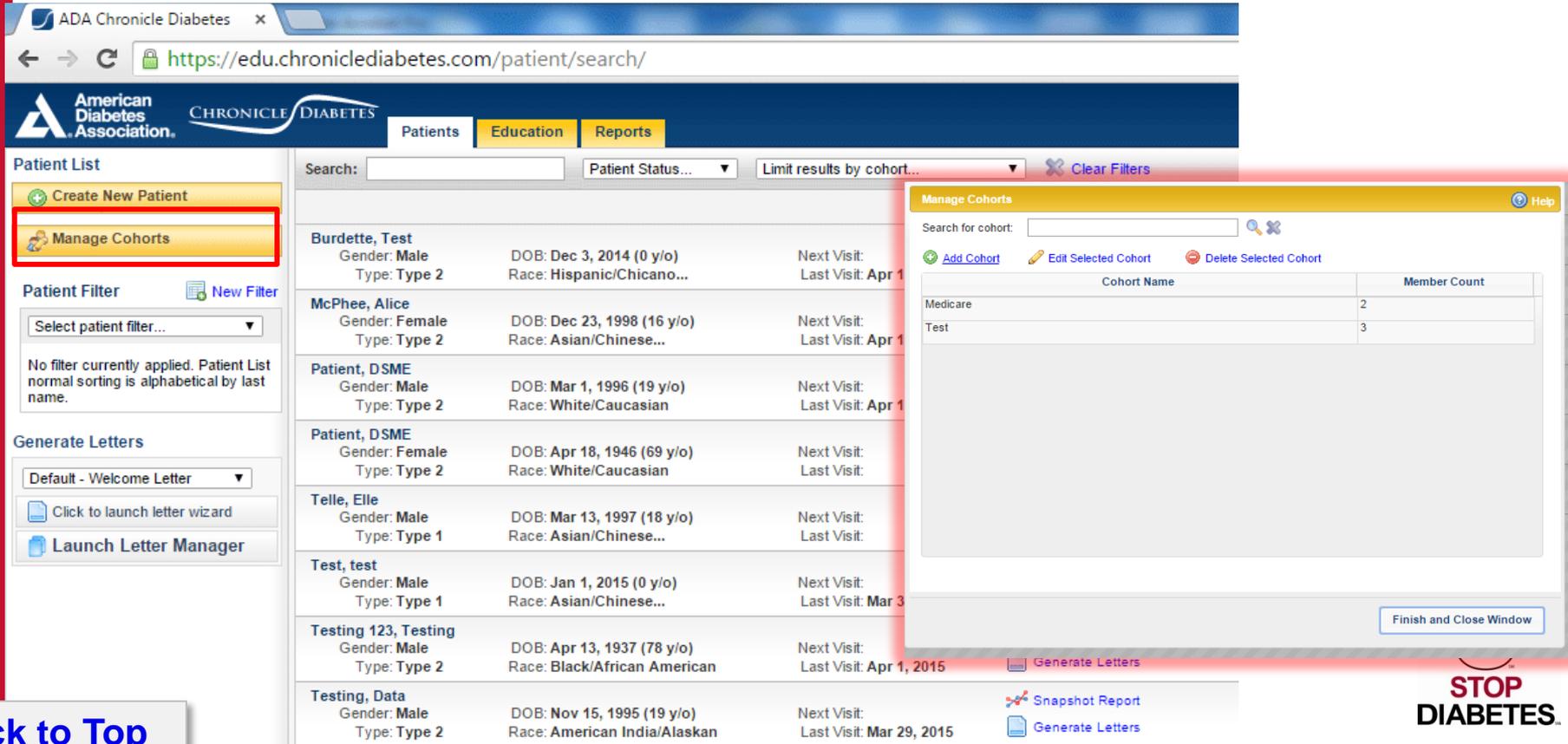
The screenshot displays the 'DSME, New' patient record in the Chronicle Diabetes system. The interface includes a navigation menu on the left with options like 'Patient Information', 'General Information', and 'Patient Reports'. The main content area shows patient details such as 'Gender: Female', 'DOB: Jan 7, 2015 (0 years old)', and 'Diabetes type: Type 1'. A 'Web Login' section is highlighted with a blue box, showing 'Username: newdsme212676' and a masked password. Below this, a 'Generate Letters' section is highlighted with a red box, containing a dropdown menu set to 'Default - Welcome Letter' and buttons for 'Click to generate selected letter' and 'Launch Letter Manager'. A red arrow points from the 'Welcome Letter' text in the introductory paragraph to the 'Generate Letters' section in the screenshot.

Creating/Managing Patient Cohorts *Page 1 of 2*

Patient Cohorts are a way to categorize patients into groups of similar patient types such as Insulin Starts, GDMs, PEDs or Referring Provider.

Creating/Managing a Cohort

1. From the Patients List Page, Click the **Manage Cohorts** Button
2. Click the *Add Cohort* button and give it an identifiable name
3. Select patients from the list to be in the cohort



The screenshot shows the ADA Chronicle Diabetes website interface. The main content area displays a list of patients with the following details:

Patient Name	Gender	DOB	Race	Next Visit	Last Visit
Burdette, Test	Male	Dec 3, 2014 (0 y/o)	Hispanic/Chicano...		Apr 1
McPhee, Alice	Female	Dec 23, 1998 (16 y/o)	Asian/Chinese...		Apr 1
Patient, DSME	Male	Mar 1, 1996 (19 y/o)	White/Caucasian		Apr 1
Patient, DSME	Female	Apr 18, 1946 (69 y/o)	White/Caucasian		
Telle, Elle	Male	Mar 13, 1997 (18 y/o)	Asian/Chinese...		
Test, test	Male	Jan 1, 2015 (0 y/o)	Asian/Chinese...		Mar 3
Testing 123, Testing	Male	Apr 13, 1937 (78 y/o)	Black/African American		Apr 1, 2015
Testing, Data	Male	Nov 15, 1995 (19 y/o)	American India/Alaskan		Mar 29, 2015

The **Manage Cohorts** modal window is open, showing a search bar and a table of existing cohorts:

Cohort Name	Member Count
Medicare	2
Test	3

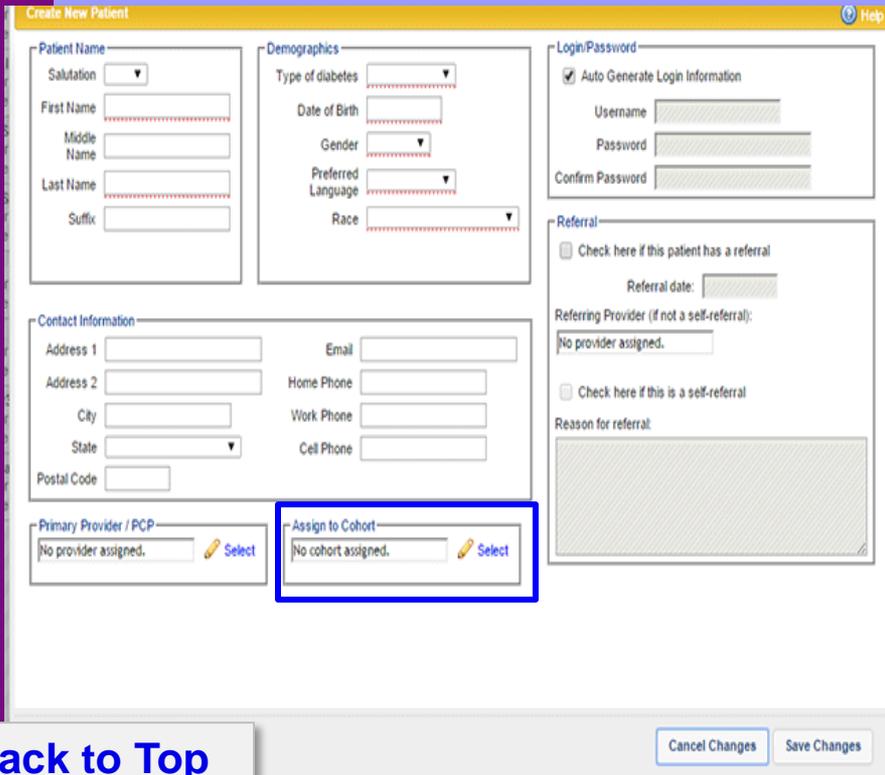
Buttons for **Add Cohort**, **Edit Selected Cohort**, and **Delete Selected Cohort** are visible. The **Manage Cohorts** window also includes a **Finish and Close Window** button.

Creating/Managing Patient Cohorts *Page 2 of 2*

Assigning a Patient to a Cohort - Cohorts can be assigned when initially creating a patient record or added within the **general information** section of an existing patient.

Assigning a **patient cohort** while creating a new patient record.

Assigning a **patient cohort** to an existing patient record.



Create New Patient

Patient Name
Salutation: [v]
First Name: []
Middle Name: []
Last Name: []
Suffix: []

Demographics
Type of diabetes: [v]
Date of Birth: []
Gender: [v]
Preferred Language: [v]
Race: [v]

Login/Password
 Auto Generate Login Information
Username: []
Password: []
Confirm Password: []

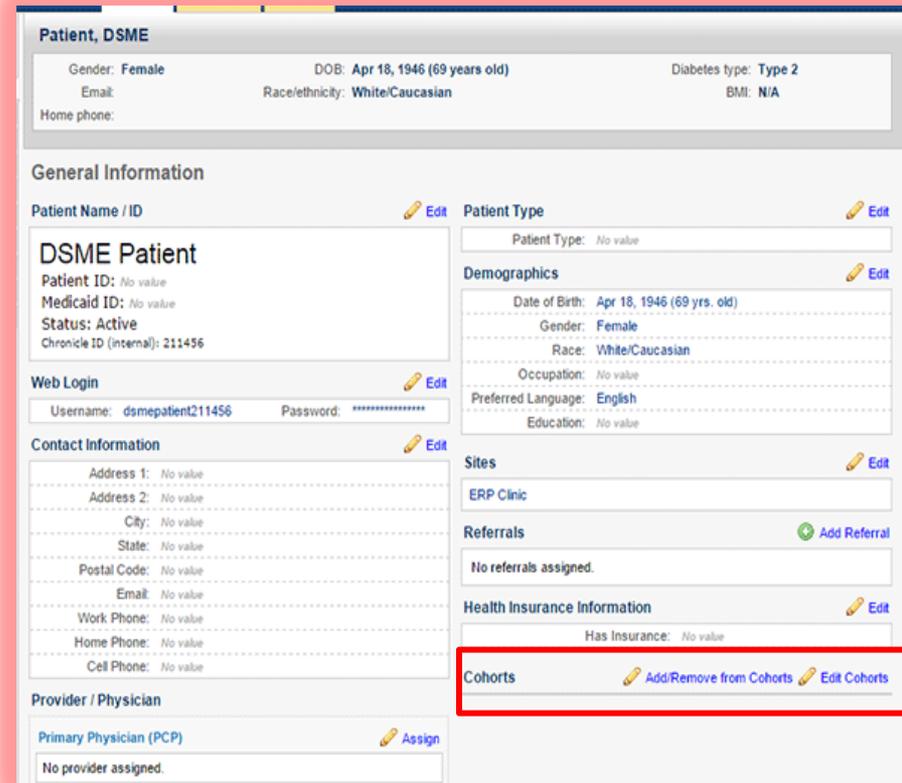
Referral
 Check here if this patient has a referral
Referral date: []
Referring Provider (if not a self-referral):
No provider assigned.
 Check here if this is a self-referral
Reason for referral: []

Contact Information
Address 1: [] Email: []
Address 2: [] Home Phone: []
City: [] Work Phone: []
State: [v] Cell Phone: []
Postal Code: []

Primary Provider / PCP
No provider assigned. [Select]

Assign to Cohort
No cohort assigned. [Select]

Cancel Changes Save Changes



Patient, DSME
Gender: Female DOB: Apr 18, 1946 (69 years old) Diabetes type: Type 2
Email: Race/ethnicity: White/Caucasian BMI: N/A
Home phone:

General Information

Patient Name / ID [Edit] **Patient Type** [Edit]
DSME Patient
Patient ID: No value
Medicaid ID: No value
Status: Active
Chronicle ID (internal): 211456

Web Login [Edit]
Username: dsmpatient211456 Password: *****

Contact Information [Edit]
Address 1: No value
Address 2: No value
City: No value
State: No value
Postal Code: No value
Email: No value
Work Phone: No value
Home Phone: No value
Cell Phone: No value

Demographics [Edit]
Date of Birth: Apr 18, 1946 (69 yrs. old)
Gender: Female
Race: White/Caucasian
Occupation: No value
Preferred Language: English
Education: No value

Sites [Edit]
ERP Clinic

Referrals [Add Referral]
No referrals assigned.

Health Insurance Information [Edit]
Has Insurance: No value

Cohorts [Add/Remove from Cohorts] [Edit Cohorts]

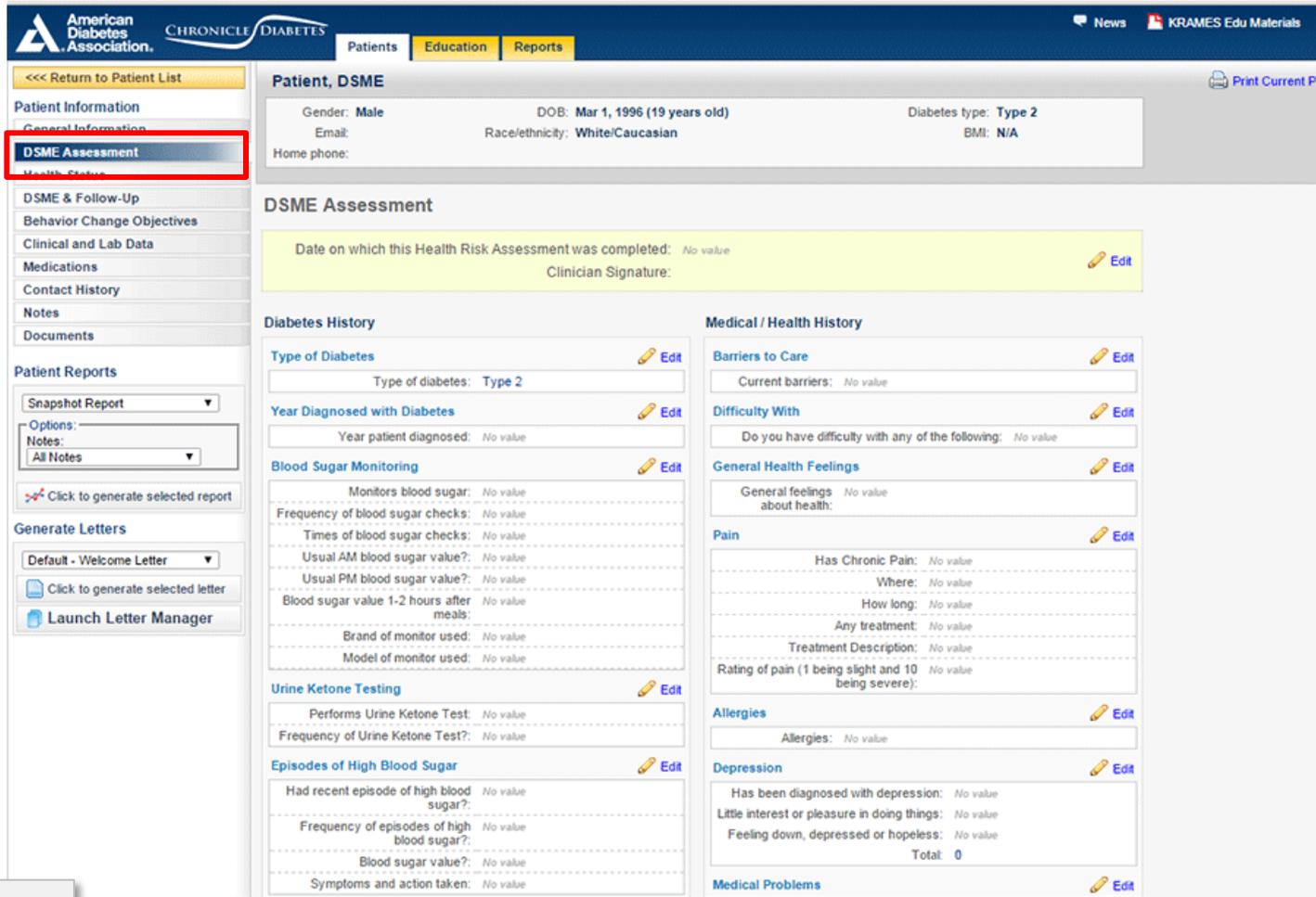
Provider / Physician [Assign]
Primary Physician (PCP)
No provider assigned.

Patient Cohort Tips

- Filter reports can be filtered by patient cohort
- Each Patient can be assigned to one or more cohorts
- You can Add, Edit or Delete a cohort through the Manage Cohorts button located near the upper left of the Patient List page.

DSME Assessment & Health Status

The **DSME Assessment** can be completed electronically by the patient or by the educator on behalf of the patient. Any of the information on this page can be edited by clicking on the *Edit* pencil to the right of the section name.

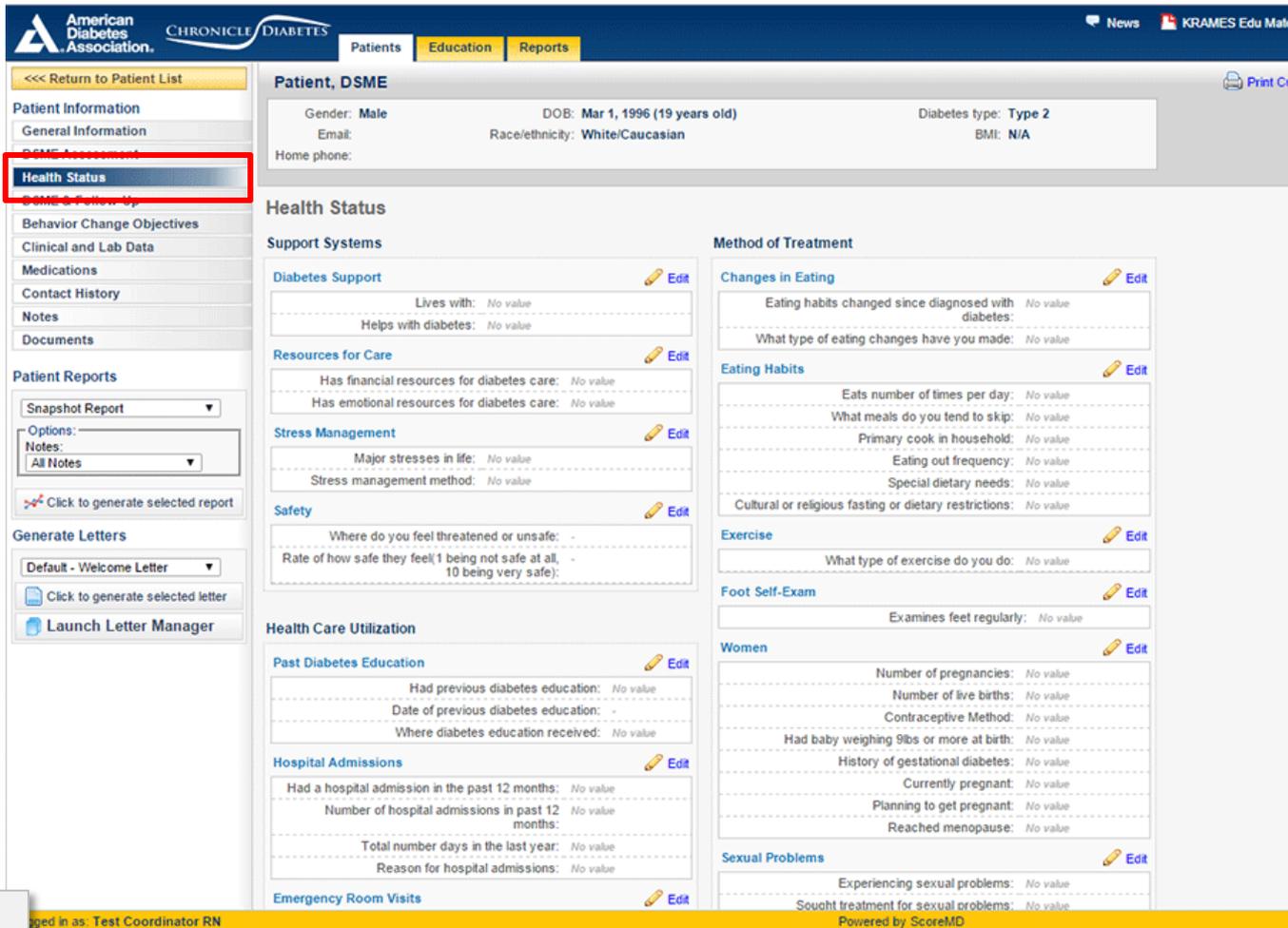


The screenshot displays the 'Patient, DSME' page in the American Diabetes Association patient portal. The left sidebar contains navigation options such as 'Patient Information', 'DSME Assessment' (highlighted with a red box), 'DSME & Follow-Up', and 'Patient Reports'. The main content area is titled 'Patient, DSME' and includes personal information like Gender (Male), DOB (Mar 1, 1996), and Diabetes type (Type 2). Below this is the 'DSME Assessment' section, which is currently empty, showing fields for completion date and clinician signature. The 'Diabetes History' section includes fields for Type of Diabetes (Type 2), Year Diagnosed, Blood Sugar Monitoring (e.g., Monitors blood sugar, Frequency of checks), Urine Ketone Testing, and Episodes of High Blood Sugar. The 'Medical / Health History' section includes Barriers to Care, Difficulty With (e.g., Do you have difficulty with any of the following?), General Health Feelings, Pain (e.g., Has Chronic Pain, Where, How long), Allergies, and Depression (e.g., Has been diagnosed with depression, Little interest or pleasure in doing things). Each section has an 'Edit' pencil icon to its right.



DSME Assessment & Health Status Page 1 of 2

The **Health Status section** can be completed electronically by the patient during their initial patient self-assessment (PSA) or by the educator on behalf of the patient. Any of the information on this page can be edited by clicking on the *Edit* pencil to the right of the section name.



Health Status

Support Systems

Diabetes Support [Edit](#)

Lives with: No value

Helps with diabetes: No value

Resources for Care [Edit](#)

Has financial resources for diabetes care: No value

Has emotional resources for diabetes care: No value

Stress Management [Edit](#)

Major stresses in life: No value

Stress management method: No value

Safety [Edit](#)

Where do you feel threatened or unsafe: -

Rate of how safe they feel (1 being not safe at all, 10 being very safe): -

Health Care Utilization

Past Diabetes Education [Edit](#)

Had previous diabetes education: No value

Date of previous diabetes education: -

Where diabetes education received: No value

Hospital Admissions [Edit](#)

Had a hospital admission in the past 12 months: No value

Number of hospital admissions in past 12 months: No value

Total number days in the last year: No value

Reason for hospital admissions: No value

Emergency Room Visits [Edit](#)

Method of Treatment

Changes in Eating [Edit](#)

Eating habits changed since diagnosed with diabetes: No value

What type of eating changes have you made: No value

Eating Habits [Edit](#)

Eats number of times per day: No value

What meals do you tend to skip: No value

Primary cook in household: No value

Eating out frequency: No value

Special dietary needs: No value

Cultural or religious fasting or dietary restrictions: No value

Exercise [Edit](#)

What type of exercise do you do: No value

Foot Self-Exam [Edit](#)

Examines feet regularly: No value

Women [Edit](#)

Number of pregnancies: No value

Number of live births: No value

Contraceptive Method: No value

Had baby weighing 9lbs or more at birth: No value

History of gestational diabetes: No value

Currently pregnant: No value

Planning to get pregnant: No value

Reached menopause: No value

Sexual Problems [Edit](#)

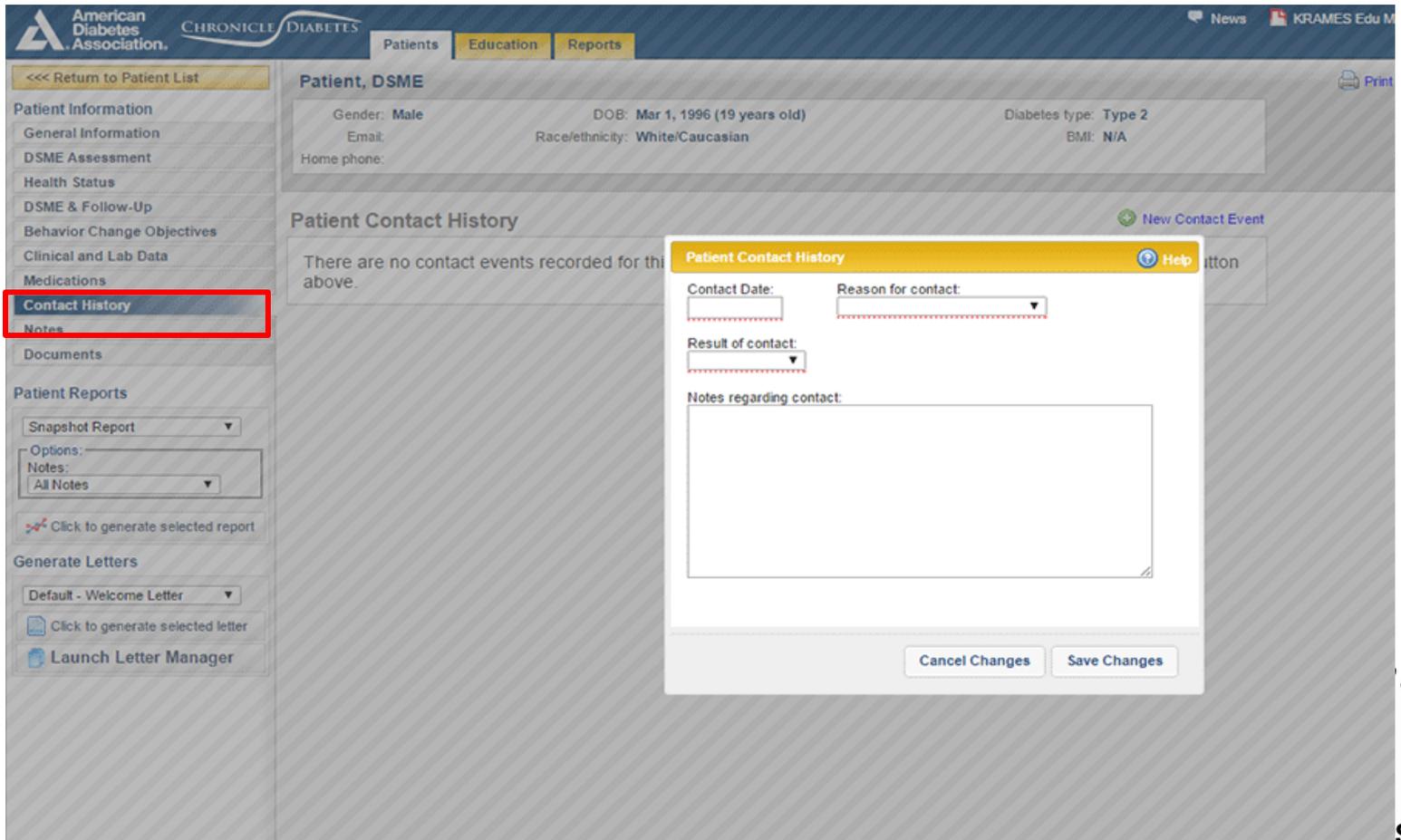
Experiencing sexual problems: No value

Sought treatment for sexual problems: No value



Contact History / Notes / Patient Documents Page 1 of 3

The **Contact History** section allows you to record and view contacts that have been made or attempted with the patient. Enter a date for the event, select the *Reason for Contact*, and the *Result of Contact*. If there is any other information that you'd like to record you can enter it in the *Notes* box.



The screenshot shows the American Diabetes Association patient management interface. The main content area displays patient information for 'Patient, DSME' (DOB: Mar 1, 1996, Type 2 Diabetes) and a 'Patient Contact History' section with a message: 'There are no contact events recorded for this patient above.' A modal window titled 'Patient Contact History' is open, containing the following fields:

- Contact Date:
- Reason for contact:
- Result of contact:
- Notes regarding contact:

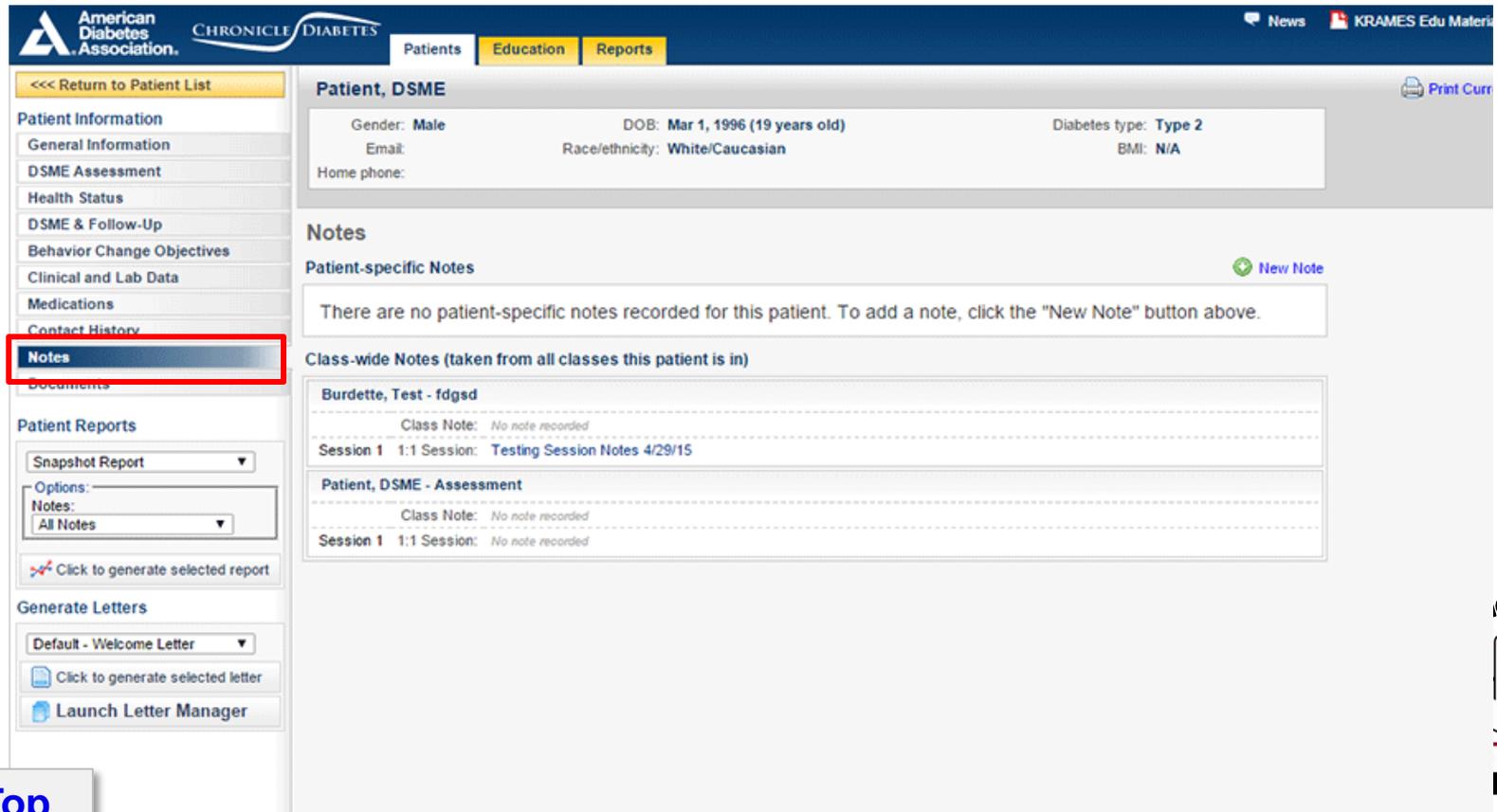
Buttons for 'Cancel Changes' and 'Save Changes' are located at the bottom of the modal. The 'Contact History' menu item in the left sidebar is highlighted with a red box.

can

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Contact History / Notes / Patient Documents Page 2 of 3

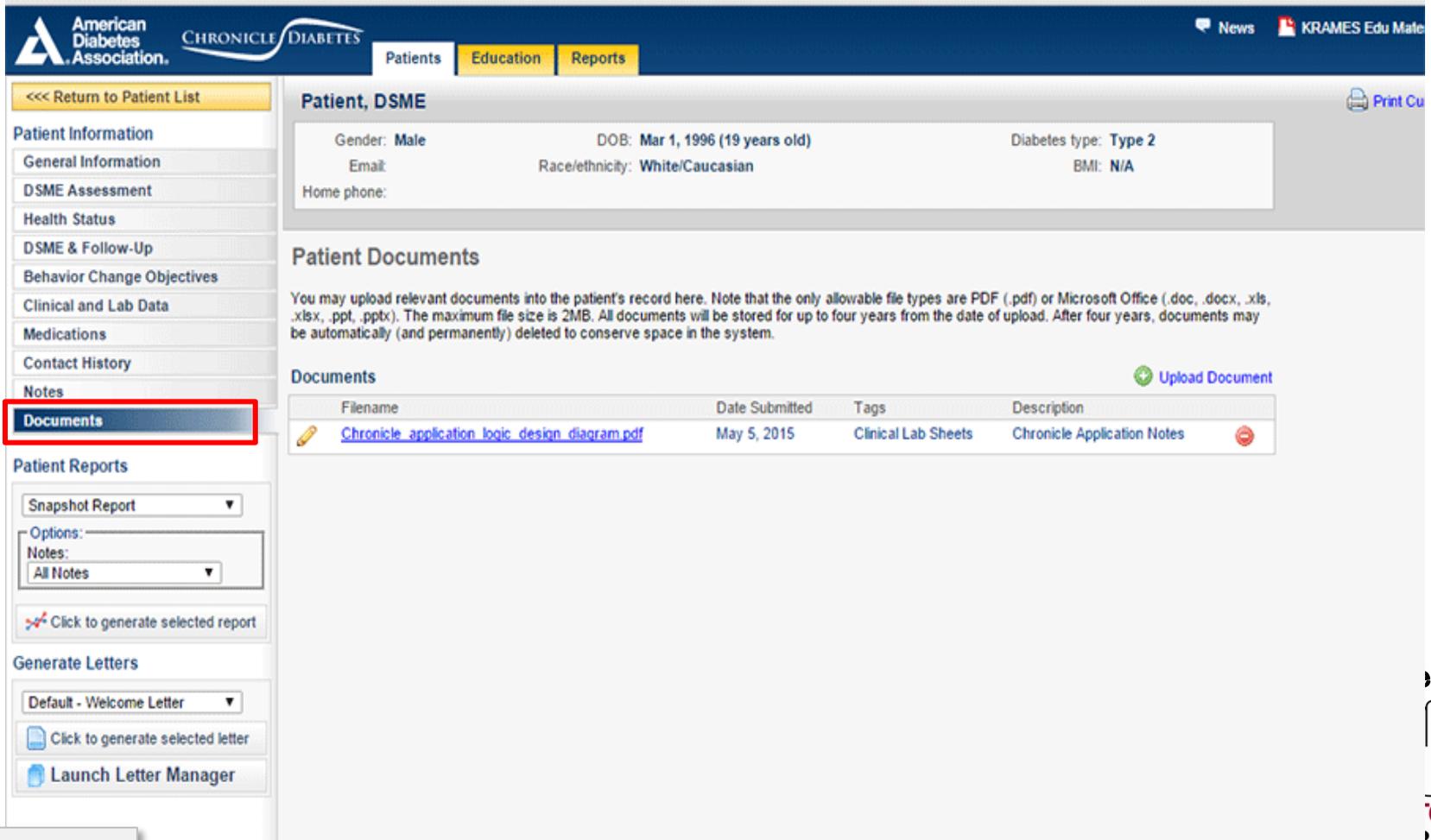
The **Notes** section allows you to record and view free-text notes about the patient. To add a new patient-specific note, click *Add New Note*, which will open the *Add / Edit Note* window. Below the patient-specific notes are both **class-wide notes** and **session-specific notes**. These are notes that are recorded for classes that the patient is in. Each class that the patient is in will be listed, and any class-wide and session notes will be displayed.



The screenshot displays the patient portal interface for a patient named DSME. The left sidebar contains navigation options: Patient Information, Patient Reports, and Generate Letters. The 'Notes' option is highlighted with a red box. The main content area shows patient information (Gender: Male, DOB: Mar 1, 1996, Diabetes type: Type 2) and a 'Notes' section. The 'Notes' section includes a 'New Note' button and a message stating there are no patient-specific notes recorded. Below this, 'Class-wide Notes' are listed for two classes: 'Burdette, Test - fdgsd' and 'Patient, DSME - Assessment'. Each class entry shows 'Class Note: No note recorded' and 'Session 1 1:1 Session: No note recorded'.

Contact History / Notes / **Patient Documents** Page 3 of 3

The **Patient Documents** section allows you to upload relevant documents into the patient's record. Note that the only allowable file types are PDF (.pdf) or Microsoft Office (.doc, .docx, .xls, .xlsx, .ppt, .pptx). The maximum file size is 2MB.



The screenshot shows the American Diabetes Association patient portal interface. The top navigation bar includes the logo, "CHRONICLE DIABETES", and tabs for "Patients", "Education", and "Reports". The patient's name "Patient, DSME" is displayed at the top of the main content area. A "Patient Information" section contains details such as Gender: Male, DOB: Mar 1, 1996 (19 years old), Diabetes type: Type 2, Email, Race/ethnicity: White/Caucasian, BMI: N/A, and Home phone. Below this is the "Patient Documents" section, which includes an "Upload Document" button and a table of existing documents. The "Documents" section is highlighted with a red box in the original image. The table lists one document: "Chronicle_application_logic_design_diagram.pdf" submitted on May 5, 2015, with the tag "Clinical Lab Sheets" and description "Chronicle Application Notes". The left sidebar contains a "Patient Information" menu with "Documents" selected, and a "Patient Reports" section with a "Snapshot Report" dropdown and "Options" for "Notes" set to "All Notes". A "Generate Letters" section is also visible at the bottom of the sidebar.

Filename	Date Submitted	Tags	Description
 Chronicle_application_logic_design_diagram.pdf	May 5, 2015	Clinical Lab Sheets	Chronicle Application Notes 

Behavioral Change Objectives Page 1 of 2

1. Clicking the **Behavior Change Objectives** tab from the left navigation pane displays a page that lists all of the patient's behavior change objectives, including a full history for each objective. At the top of the page are two *Personal Goals* which are questions asked of the patient during the PSA.

The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://demo.chronicdiabetes.com/dsme/patient/detail/34/". The page header includes the American Diabetes Association logo and navigation tabs for "Patients", "Education", and "Reports". The patient's name is "Addelson, Margaret".

Personal Information:
Gender: Female | DOB: Mar 1, 1989 (23 years old) | Diabetes type: Pre-diabetes
Race/ethnicity: Hispanic/Chicano/Latino/Mexican | BMI:
Home phone:

Behavior Change Objectives

Personal Goals [Edit](#)

- Hopes to gain the following from this educational program: No value
- Two things patient needs help with to improve diabetes: No value

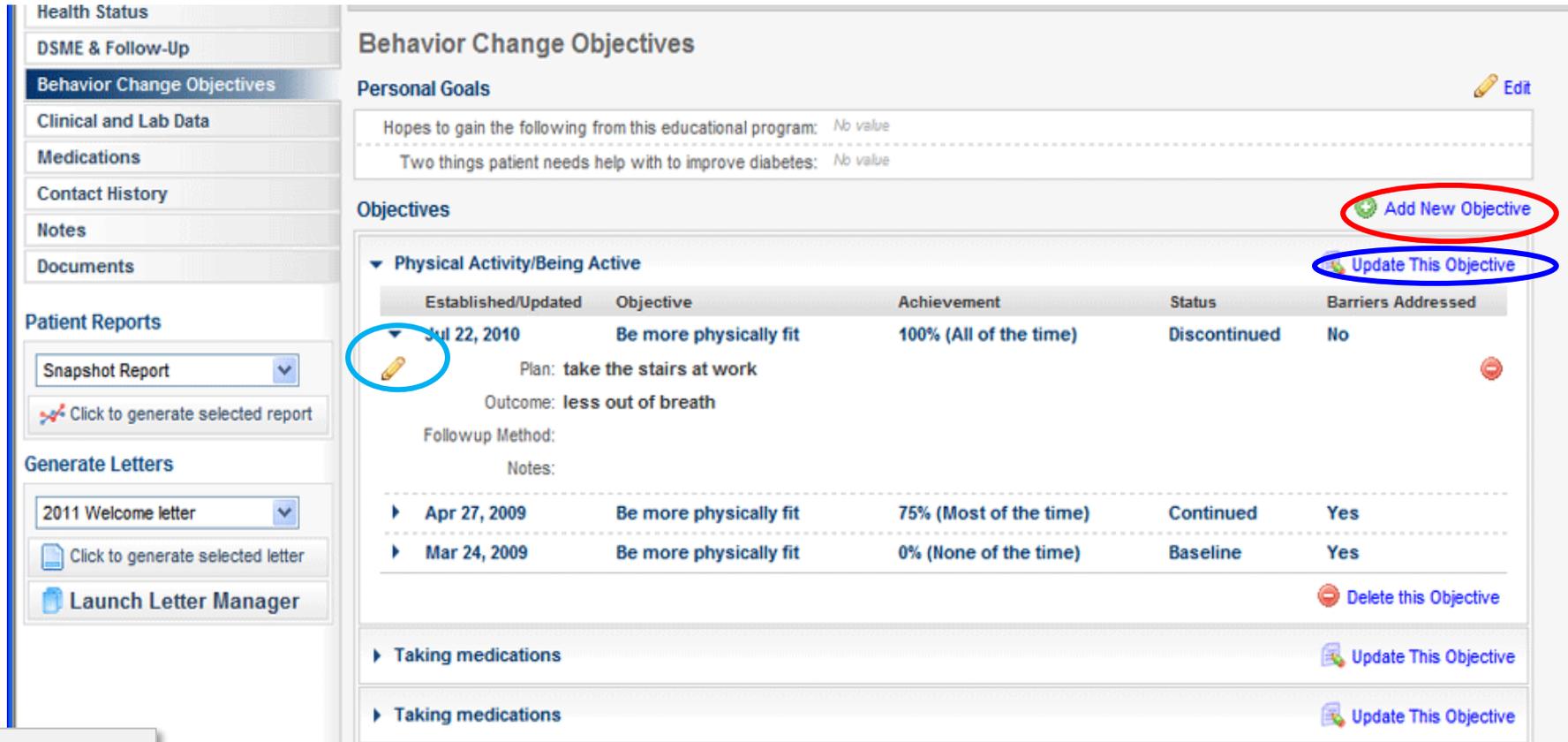
Objectives [Add New Objective](#)

- Physical Activity/Being Active [Update This Objective](#)
- Taking medications [Update This Objective](#)
- Taking medications [Update This Objective](#)

The left navigation pane includes sections for "Patient Information", "Patient Reports", and "Generate Letters". The "Behavior Change Objectives" link in the "Patient Information" section is highlighted with a red box.

Behavioral Change Objectives *Page 2 of 2*

2. The *Objectives* section allows you to document how the patient's objectives (and their adherence to those objectives) change over time. To add a new baseline objective, click on **Add new objective**. When you next follow up with the patient you can **update the objective's status**, recording the patient's new achievement level. An existing baseline objective or objective update can be edited by clicking on the **edit pencil** to the left of the record.



Behavior Change Objectives

Personal Goals  Edit

Hopes to gain the following from this educational program: No value

Two things patient needs help with to improve diabetes: No value

Objectives  Add New Objective

▼ **Physical Activity/Being Active**  Update This Objective

Established/Updated	Objective	Achievement	Status	Barriers Addressed
Jul 22, 2010 	Be more physically fit Plan: take the stairs at work Outcome: less out of breath Followup Method: Notes:	100% (All of the time)	Discontinued	No
▶ Apr 27, 2009	Be more physically fit	75% (Most of the time)	Continued	Yes
▶ Mar 24, 2009	Be more physically fit	0% (None of the time)	Baseline	Yes

 Delete this Objective

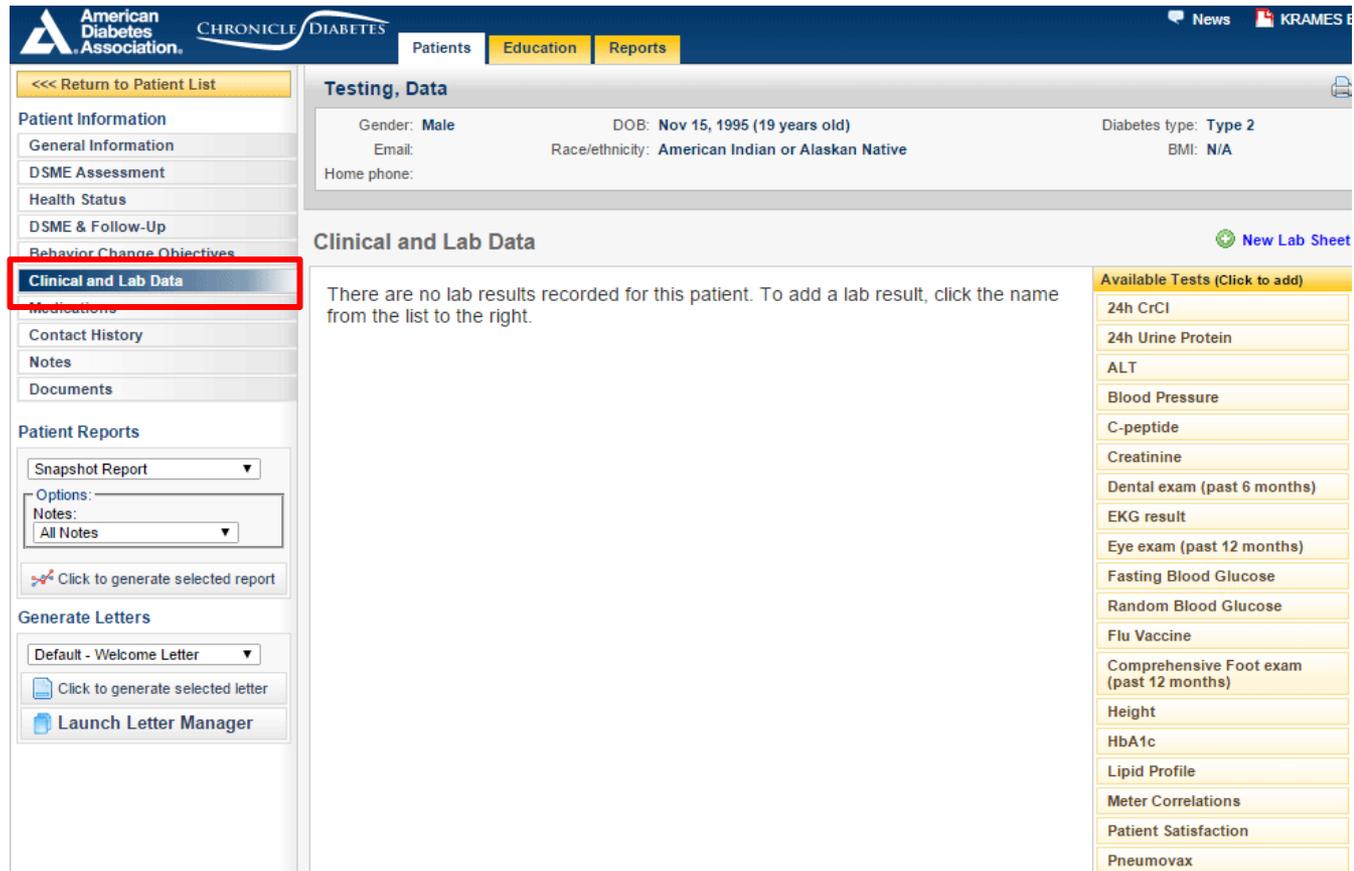
▶ Taking medications  Update This Objective

▶ Taking medications  Update This Objective

Clinical Data and Labs *Page 1 of 4*

Clicking the **Clinical and Lab Data** button from the left navigation pane displays a page that lists all of the most recent clinical data and lab information for the patient. For a new patient with no clinical data or labs documented, the main middle section of this page will be empty and the full list of *Available Tests* will be displayed on the right side of the page.

As test values are documented, those values will be displayed in the main middle section and the test will be removed from the *Available Tests* lists.



The screenshot displays the American Diabetes Association patient portal interface. The top navigation bar includes the logo, "CHRONICLE / DIABETES", and tabs for "Patients", "Education", and "Reports". The left sidebar contains a navigation menu with "Clinical and Lab Data" highlighted in a red box. The main content area is titled "Testing, Data" and shows patient information: Gender: Male, DOB: Nov 15, 1995 (19 years old), Diabetes type: Type 2, Race/ethnicity: American Indian or Alaskan Native, and BMI: N/A. Below this is the "Clinical and Lab Data" section, which is currently empty and contains the message: "There are no lab results recorded for this patient. To add a lab result, click the name from the list to the right." To the right of this message is a list of "Available Tests (Click to add)", including: 24h CrCl, 24h Urine Protein, ALT, Blood Pressure, C-peptide, Creatinine, Dental exam (past 6 months), EKG result, Eye exam (past 12 months), Fasting Blood Glucose, Random Blood Glucose, Flu Vaccine, Comprehensive Foot exam (past 12 months), Height, HbA1c, Lipid Profile, Meter Correlations, Patient Satisfaction, and Pneumovax.

Clinical Data and Labs - Adding a new clinical data or lab test result *Page 2 of 4*

After you have gathered clinical data or lab results for a patient, you can enter both the most recent values as well as historical values into Chronicle. To enter a test result for a test that doesn't have any previous data, begin by clicking on the test's name in the *Available Tests* lists. Alternatively, if the test already has one or more previous results and you're going to be adding another test result, click the *Add Results* link to the right of the test's name. Doing either of these will bring up the *New Lab* window.

Enter the following information:

- Test result
- Date Performed
- Source of data
- Notes
- Provider

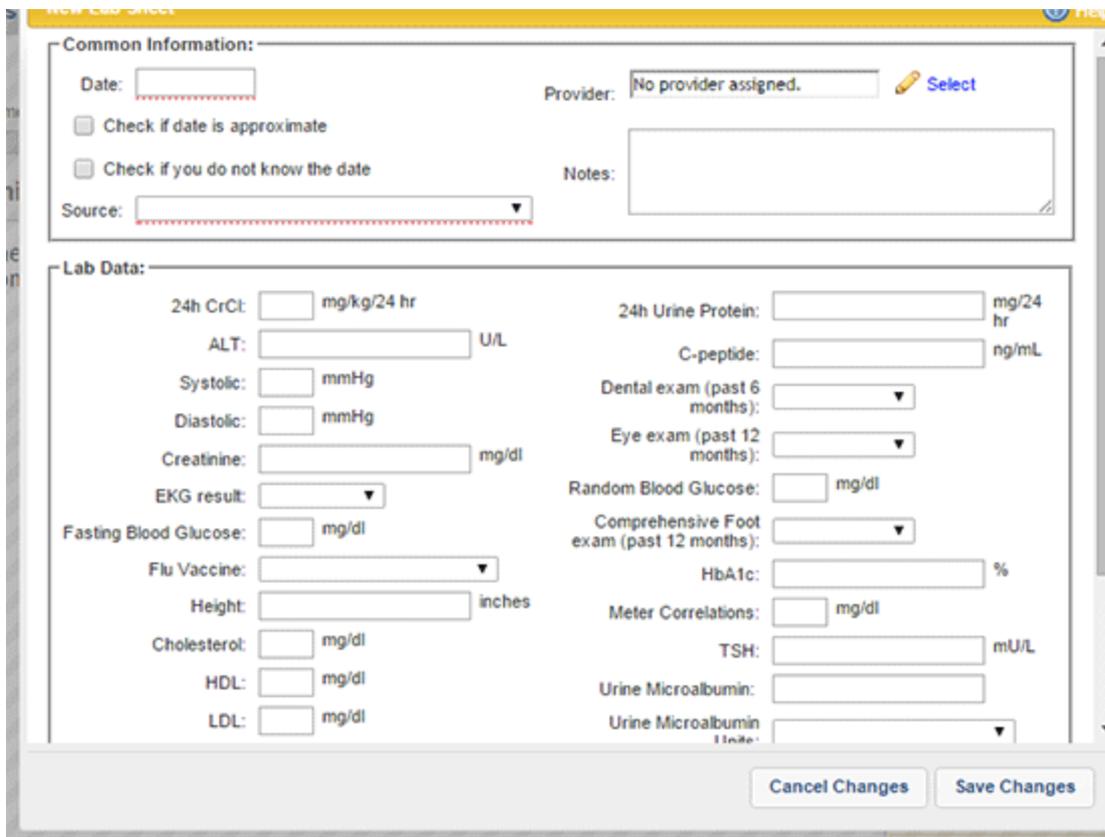
When you have entered all of the information, click the *Save Changes* button to save the test result. If the value you just entered is the most recent value for that test, then the new value will be displayed in the center table.



Clinical Data and Labs - Adding multiple clinical data or lab test results using a Lab Sheet *Page 3 of 4*

If you are going to be entering multiple clinical data or lab test result values that all share the same common information you can use a *Lab Sheet* to speed the entry. Click the *New Lab Sheet* link in the upper right above the *Available Tests* lists.

Note that all of the data entered on the *Lab Sheet* will share the same Common Information. Also, when the Lab Sheet is saved, the individual test results are all stored individually- they're not stored as a single lab sheet..



The screenshot displays the 'New Lab Sheet' form, which is divided into two main sections: 'Common Information' and 'Lab Data'.

Common Information:

- Date:
- Provider: [Select](#)
- Check if date is approximate
- Check if you do not know the date
- Source:
- Notes:

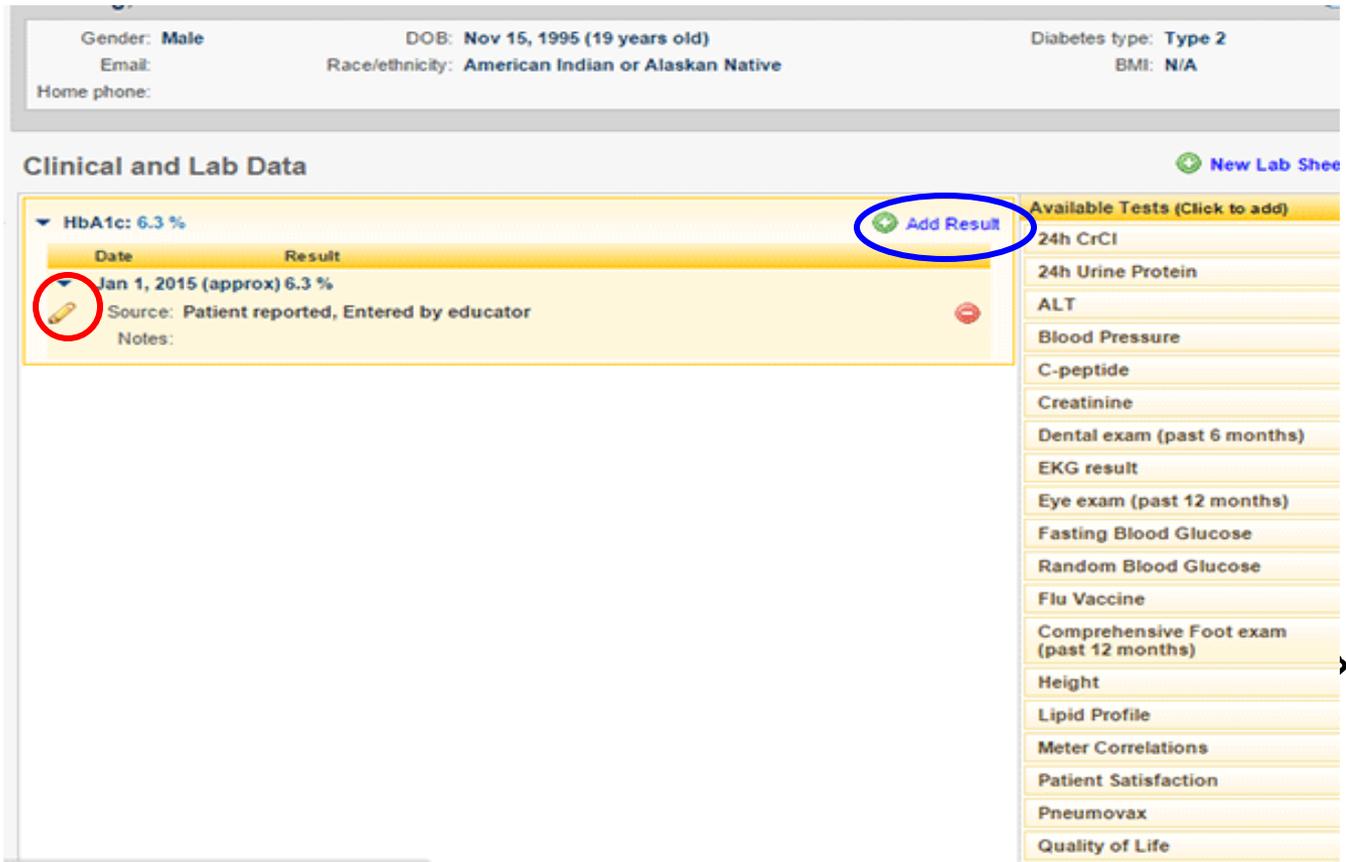
Lab Data:

24h CrCl: <input type="text"/> mg/kg/24 hr	24h Urine Protein: <input type="text"/> mg/24 hr
ALT: <input type="text"/> U/L	C-peptide: <input type="text"/> ng/mL
Systolic: <input type="text"/> mmHg	Dental exam (past 6 months): <input type="text"/>
Diastolic: <input type="text"/> mmHg	Eye exam (past 12 months): <input type="text"/>
Creatinine: <input type="text"/> mg/dl	Random Blood Glucose: <input type="text"/> mg/dl
EKG result: <input type="text"/>	Comprehensive Foot exam (past 12 months): <input type="text"/>
Fasting Blood Glucose: <input type="text"/> mg/dl	HbA1c: <input type="text"/> %
Flu Vaccine: <input type="text"/>	Meter Correlations: <input type="text"/> mg/dl
Height: <input type="text"/> inches	TSH: <input type="text"/> mU/L
Cholesterol: <input type="text"/> mg/dl	Urine Microalbumin: <input type="text"/>
HDL: <input type="text"/> mg/dl	Urine Microalbumin <input type="text"/>
LDL: <input type="text"/> mg/dl	

Buttons: [Cancel Changes](#) [Save Changes](#)

Clinical Data and Labs - Editing or deleting an existing test result *Page 4 of 4*

To edit an existing test result, begin by clicking on the test in the main middle section, which will expand the test down to reveal the historical results. Click on the specific test result that you'd like to edit (which will expand that individual result) and then click the **Edit pencil icon**. This will open the *Edit Lab* window where you can make any necessary corrections and click the *Save Changes* button. To add a result to an existing lab value, click on the **Add Result** link next to the appropriate lab entry.



The screenshot displays a patient's clinical and lab data. At the top, patient information is shown: Gender: Male, Email: (blank), Home phone: (blank), DOB: Nov 15, 1995 (19 years old), Race/ethnicity: American Indian or Alaskan Native, Diabetes type: Type 2, and BMI: N/A. Below this is the "Clinical and Lab Data" section, which includes a "New Lab Sheet" button. The main data area is divided into two columns. The left column shows a table of HbA1c results. The right column lists "Available Tests (Click to add)" such as 24h CrCl, 24h Urine Protein, ALT, Blood Pressure, C-peptide, Creatinine, Dental exam (past 6 months), EKG result, Eye exam (past 12 months), Fasting Blood Glucose, Random Blood Glucose, Flu Vaccine, Comprehensive Foot exam (past 12 months), Height, Lipid Profile, Meter Correlations, Patient Satisfaction, Pneumovax, and Quality of Life.

Date	Result
Jan 1, 2015 (approx)	6.3 %

Source: Patient reported, Entered by educator

Notes:

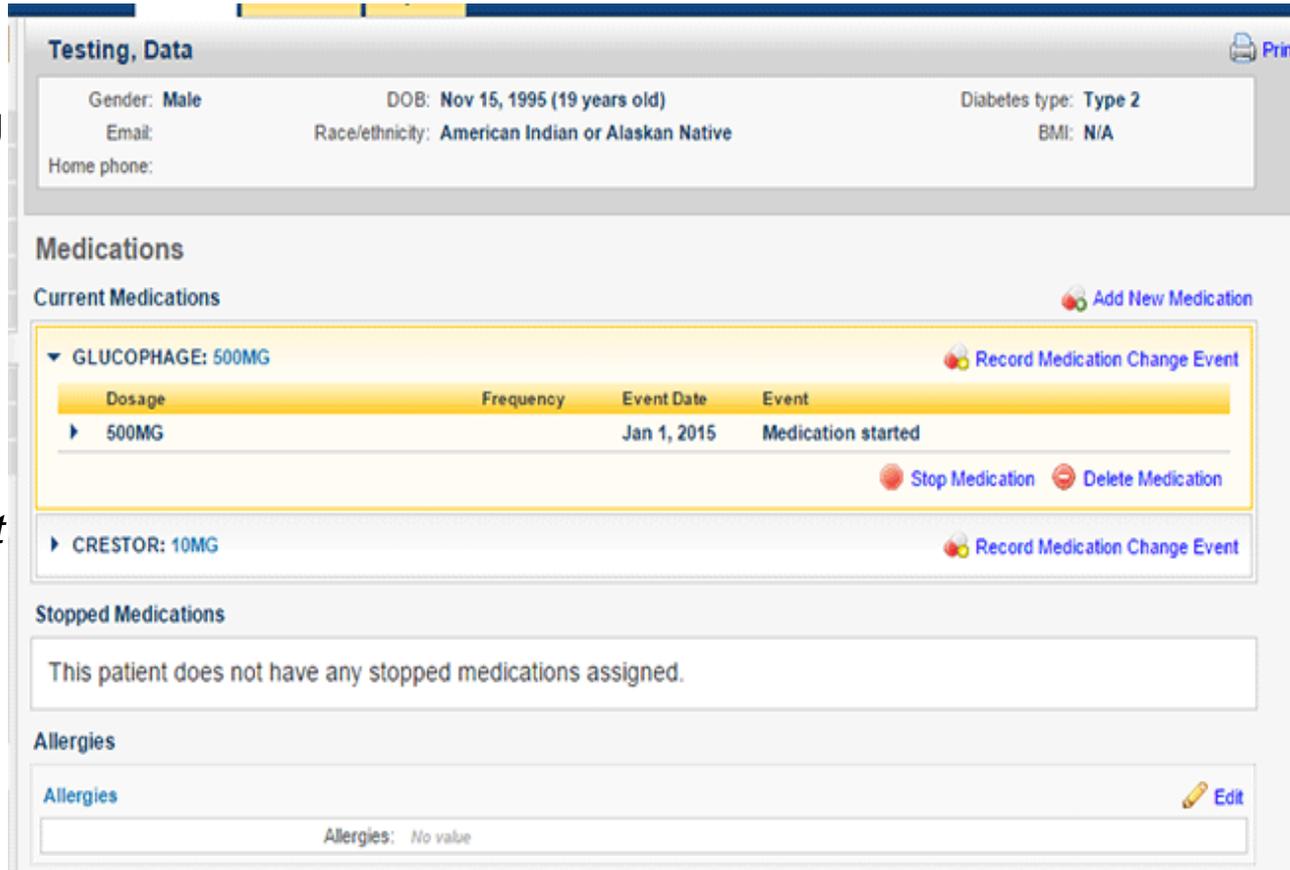
Add Result

Documenting Medications *Page 1 of 5*

Clicking the *Medications* tab from the left navigation pane displays a page that lists all of the medications that the patient is taking or was taking in the past. Each listing in the center table lists a medication and the most recent information about that medication. For new patient the center section will be empty.

By clicking on a specific medication line, the listing will expand down to reveal a complete history of *Medication Change Events* for that medication.

Clicking on a specific *Medication Change Event* will cause it to expand down and reveal any notes for that event.



Testing, Data  Print

Gender: **Male** DOB: **Nov 15, 1995 (19 years old)** Diabetes type: **Type 2**
Email: Race/ethnicity: **American Indian or Alaskan Native** BMI: **N/A**
Home phone:

Medications

Current Medications  Add New Medication

▼ **GLUCOPHAGE: 500MG**  Record Medication Change Event

Dosage	Frequency	Event Date	Event
▶ 500MG		Jan 1, 2015	Medication started

 Stop Medication  Delete Medication

▶ **CRESTOR: 10MG**  Record Medication Change Event

Stopped Medications

This patient does not have any stopped medications assigned.

Allergies

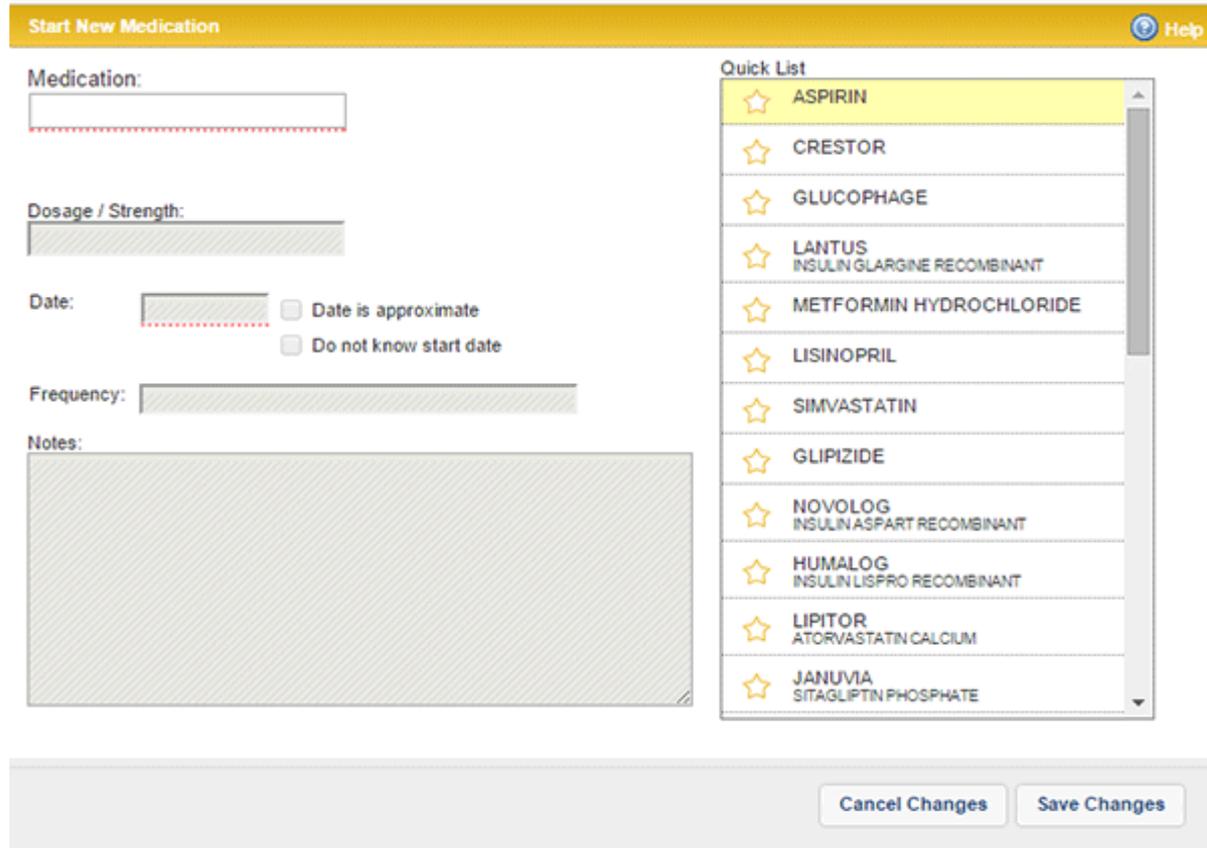
Allergies  Edit

Allergies: No value

Adding a medication *Page 2 of 5*

To enter a new medication, click the *Add New Medication* link (near the top right of the *Medications* page) to bring up the *Start New Medication* window. This box allows you to enter a new medication for this patient. The *Quick List* on the right contains medications that you've previously marked as a favorite (marked with solid stars) as well as other popular or recent medications (marked with empty stars). The boxes on the left allow you to select a medication that isn't already in your *Quick List*.

Tip: If the medication that you just entered is one that you believe you'll be using frequently, you can add it to the *Quick List* by clicking the link *Add medication to favorites* link next to the medication's name.



Start New Medication Help

Medication:

Dosage / Strength:

Date: Date is approximate
 Do not know start date

Frequency:

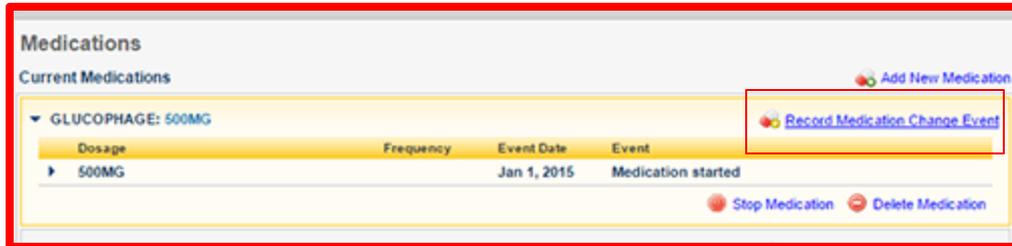
Notes:

Quick List

- ☆ ASPIRIN
- ☆ CRESTOR
- ☆ GLUCOPHAGE
- ☆ LANTUS
INSULIN GLARGINE RECOMBINANT
- ☆ METFORMIN HYDROCHLORIDE
- ☆ LISINAPRIL
- ☆ SIMVASTATIN
- ☆ GLIPIZIDE
- ☆ NOVOLOG
INSULIN ASPART RECOMBINANT
- ☆ HUMALOG
INSULIN LISPRO RECOMBINANT
- ☆ LIPITOR
ATORVASTATIN CALCIUM
- ☆ JANUVIA
SITAGLIPTIN PHOSPHATE

Recording a medication change event *Page 3 of 5*

If a patient's prescribed medication regimen changes (e.g. the dosage or frequency of a medication that they are on is modified), you can document this information by recording a medication change event.

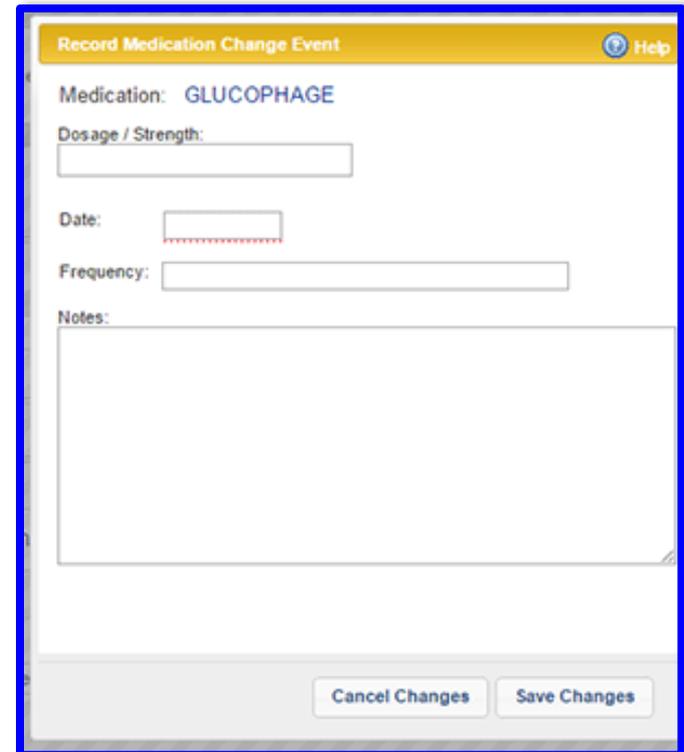


The screenshot shows a 'Medications' interface. Under 'Current Medications', there is a table with the following data:

Dosage	Frequency	Event Date	Event
500MG		Jan 1, 2015	Medication started

Buttons for 'Add New Medication', 'Record Medication Change Event', 'Stop Medication', and 'Delete Medication' are visible. The 'Record Medication Change Event' link is highlighted with a red box.

Click the **Record Medication Change Event** link to the right of the medication's name, which will bring up the **Record Medication Change Event window**. Here you can enter the date that the medication change event took place. Then enter the new dosage and frequency for the medication, and any notes that you'd like associated with the change of this medication.



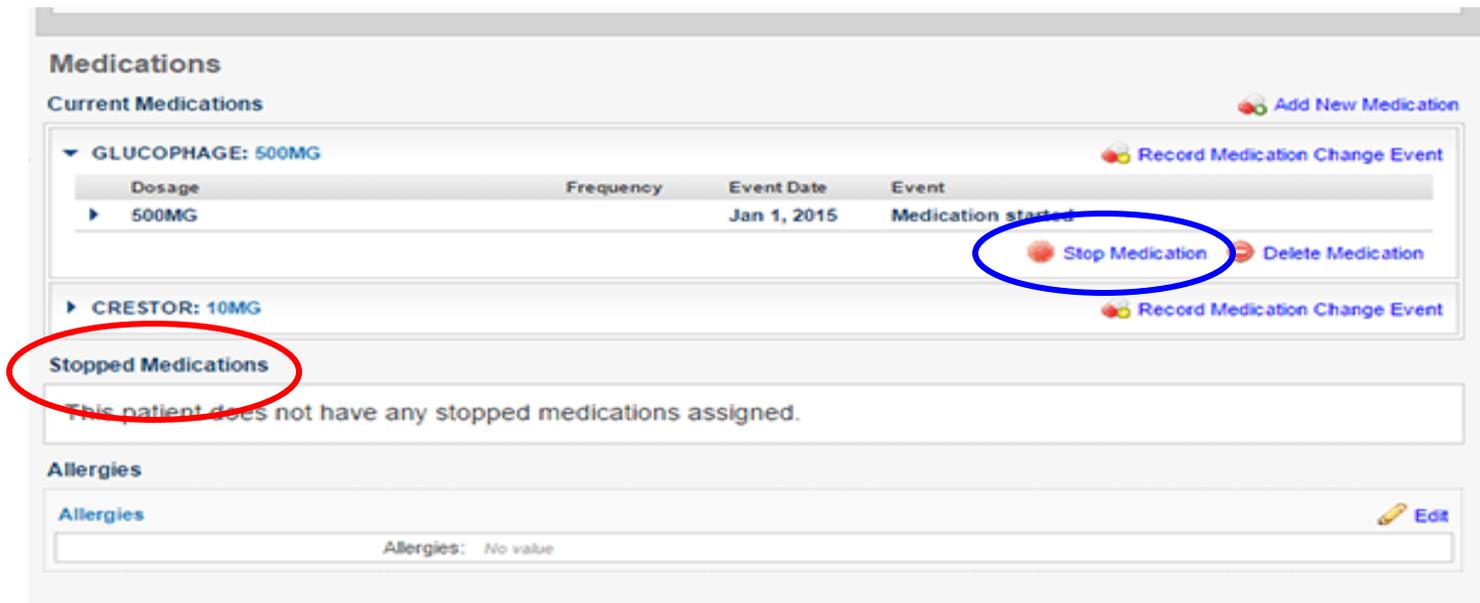
The 'Record Medication Change Event' window is shown. It contains the following fields:

- Medication: GLUCOPHAGE
- Dosage / Strength:
- Date:
- Frequency:
- Notes:

Buttons for 'Cancel Changes' and 'Save Changes' are at the bottom.

Recording a **Stop** medication event *Page 4 of 5*

If a patient is no longer taking a medication that they had previously been prescribed, you can document this information by recording a stop medication event. Begin by clicking on the medication's name in the main medication table. Then click the **Stop Medication** link to bring up the *Stop Medication* window. Enter the date on which the patient stopped taking the medication and any associated notes. When you have entered all of the information, click the *Save Changes* button to save the stop medication event. You'll see that the medication has been removed from the *Current Medication* table down into the **Stopped Medications table**.



The screenshot displays the 'Medications' section of a patient's record. It is divided into 'Current Medications' and 'Stopped Medications'.

Current Medications:

- GLUCOPHAGE: 500MG** (circled in blue): Includes a 'Record Medication Change Event' link. Below it is a table with columns: Dosage, Frequency, Event Date, and Event. The row shows '500MG', 'Medication started', and 'Jan 1, 2015'. To the right of this row are 'Stop Medication' (circled in blue) and 'Delete Medication' buttons.
- CRESTOR: 10MG** (circled in red): Includes a 'Record Medication Change Event' link.

Stopped Medications: (circled in red) This patient does not have any stopped medications assigned.

Allergies: Allergies: No value (with an 'Edit' button).

Creating a new (custom) medication *Page 5 of 5*

If a patient is taking a medication that is not already in the database, you can manually add the medication to your site's medication database so that it will be available for future use.

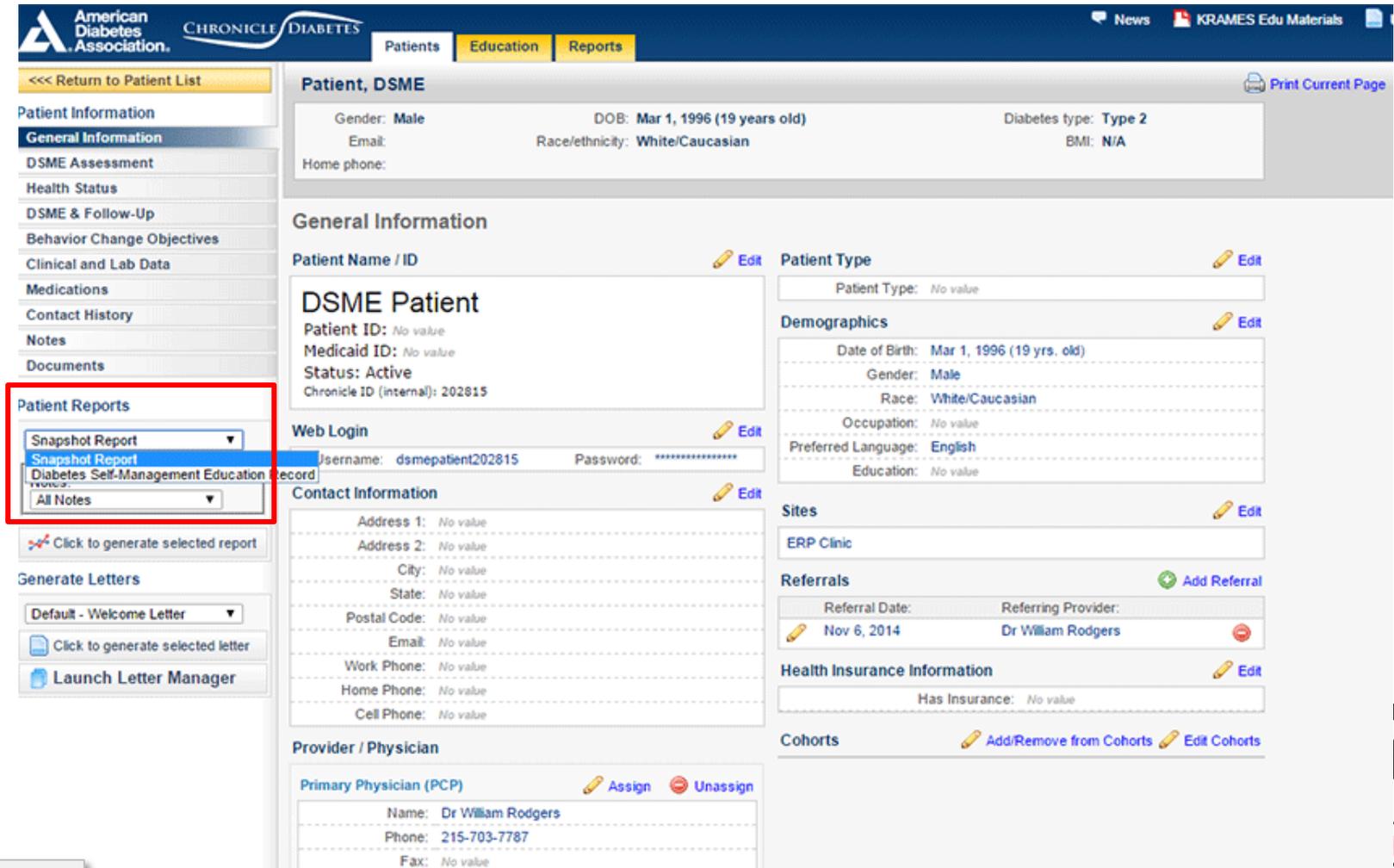
Begin by trying to add the medication to a patient's record

- Click the **Add New Medication** button to bring up the Start New Medication window.
- Type in the Trade Name, and if the medication isn't already in the medication database you'll be presented with no matches but will have an option to click Add a new medication named [name]. Clicking this option will bring up a link that says Click to add "[name]" as a custom medication. Clicking that will add the medication you entered as a new medication in the database. From then on it will be available to all your site's educators in the medication's list in the future.



Patient Reports Page 1 of 3

The **Snapshot Report** and the **DSME Record report** give an overview of the data about a specific patient. Both reports are generated through the **Patient Reports** section of the patient record.



The screenshot displays the 'Patient, DSME' record page. The left sidebar contains a navigation menu with 'Patient Reports' highlighted in red. A dropdown menu is open under 'Patient Reports', showing options: 'Snapshot Report', 'Snapshot Report', 'Diabetes Self-Management Education Record', and 'All Notes'. The main content area shows patient details: Gender: Male, DOB: Mar 1, 1996 (19 years old), Diabetes type: Type 2, Email, Race/ethnicity: White/Caucasian, BMI: N/A, Home phone. Below this is the 'General Information' section with fields for Patient Name / ID (DSME Patient), Patient ID, Medicaid ID, Status (Active), and Chronicle ID (202815). Other sections include Web Login (username: dsmpatient202815), Contact Information (Address 1, Address 2, City, State, Postal Code, Email, Work Phone, Home Phone, Cell Phone), Provider / Physician (Primary Physician (PCP): Dr William Rodgers), Patient Type, Demographics (Date of Birth, Gender, Race, Occupation, Preferred Language, Education), Sites (ERP Clinic), Referrals (Referral Date: Nov 6, 2014, Referring Provider: Dr William Rodgers), Health Insurance Information (Has Insurance: No value), and Cohorts.

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Patient Reports *Page 2 of 3*

The Snapshot Report This report gives an overview of the data about a specific patient. The left column contains lists of the patient's current medications, recent interventions, topics that were covered during the educational sessions, and the patient's goals (and their change rate). The right column of the report contains clinical data, with historical values listed in a table and a graph displaying the change over time.

Diabetes: **Type 2** Gender: **Male** DOB: **3/1/1996 (19)** Last edu. visit: **Apr 1, 2015** Height: **N/A** Weight: **188.00** BMI: **N/A** Waist: **N/A** Referring Provider:

Current Medications

Aspirin 81 MG
allergies: No Data

Recent Interventions

Intervention	Result / Date
Dental Exam	No Data
Eye Exam	No Data
Foot Exam	No Data
Urine Protein	No Data
Urine microalb	No Data
Flu Vaccine	No Data
Pneumonia Vaccine	No Data
EKG	No Data

Educational Topics Addressed

Topic	Most recently covered
Disease Process	4/01/2015
Nutritional Management	4/01/2015
Being Active	4/01/2015
Taking medications	4/01/2015
Monitoring	4/01/2015
Acute complications	4/01/2015
Chronic complication	4/01/2015
Psychosocial Adjustment	4/01/2015
Promote health	4/01/2015

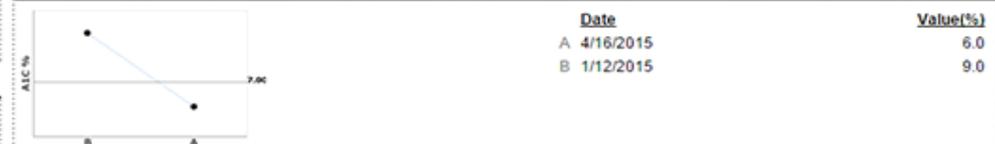
Behavior Change Objectives

Objective	Current Level	Assessed
Test	75% (Most)	4/14/2015
Monitor two times a day, AM & PM	100% (All)	3/31/2015

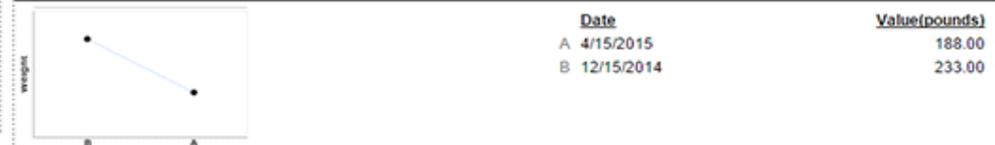
DSMS Plan

None

HbA1c



Weight



Blood Pressure

No data available

Cholesterol - Total and HDL

No data available

Cholesterol - LDL and Trigs

No data available

Patient Reports *Page 3 of 3*

The **DSME Record report** contains the information that was documented for the patient's educational session(s). This includes the pre assessment and post evaluation of the patient's ability in the nine ADA topic/learning objectives, class methods and materials, barriers and DSMS plan. All of the educational information included in this report will represent the most current information documented in Chronicle.

Diabetes Self-Management Education Record

Topics/Learning Objectives	Pre-Session Assessment	Comments	Instr. Date	Post-Session Evaluation	Comments
Diabetes disease process and Treatment options	1		04/01/2015	3	
Incorporating nutritional management into lifestyle	2		04/01/2015	4	
Incorporating physical activity into lifestyle	2		04/01/2015	3	
Using medications safely	1		04/01/2015	4	
Monitoring blood glucose, interpreting and using results	1		04/01/2015	4	
Prevention, detection and treatment of acute complications	1		04/01/2015	3	
Prevention, detection and treatment of chronic complications	1		04/01/2015	3	
Developing strategies to address psychosocial issues	2		04/01/2015	4	
Developing strategies to promote health/change behavior	2		04/01/2015	4	

Ratings: 1=Needs instruction 2=Needs review 3= Comprehends key points 4= Demonstrates competency NA=Not applicable

Education plan:

Instruction Method:

Lecture/Discussion, Demonstration (Source: Assessment (12/01/2014))

Education Materials/Equipment Provided:

Computer aided (Interactive) (Source: Assessment (12/01/2014))

Identified Barriers to learning/adherence to self management plan:

DSMS Plan:

Diabetes Forecast- 800-342-2383- www.diabetesforecast.org Diabetes Self-Management- 855-367-4813- www.diabetesselfmanagement.com (Source: Assessment (12/1/14))

Module 2: Creating/Managing Classes & Documenting Education

Creating a 1:1 or Group Class: Page 1 of 7

1. Click on the **Education tab** at the top of the page. You will see a list of existing classes, along with basic information about the class.

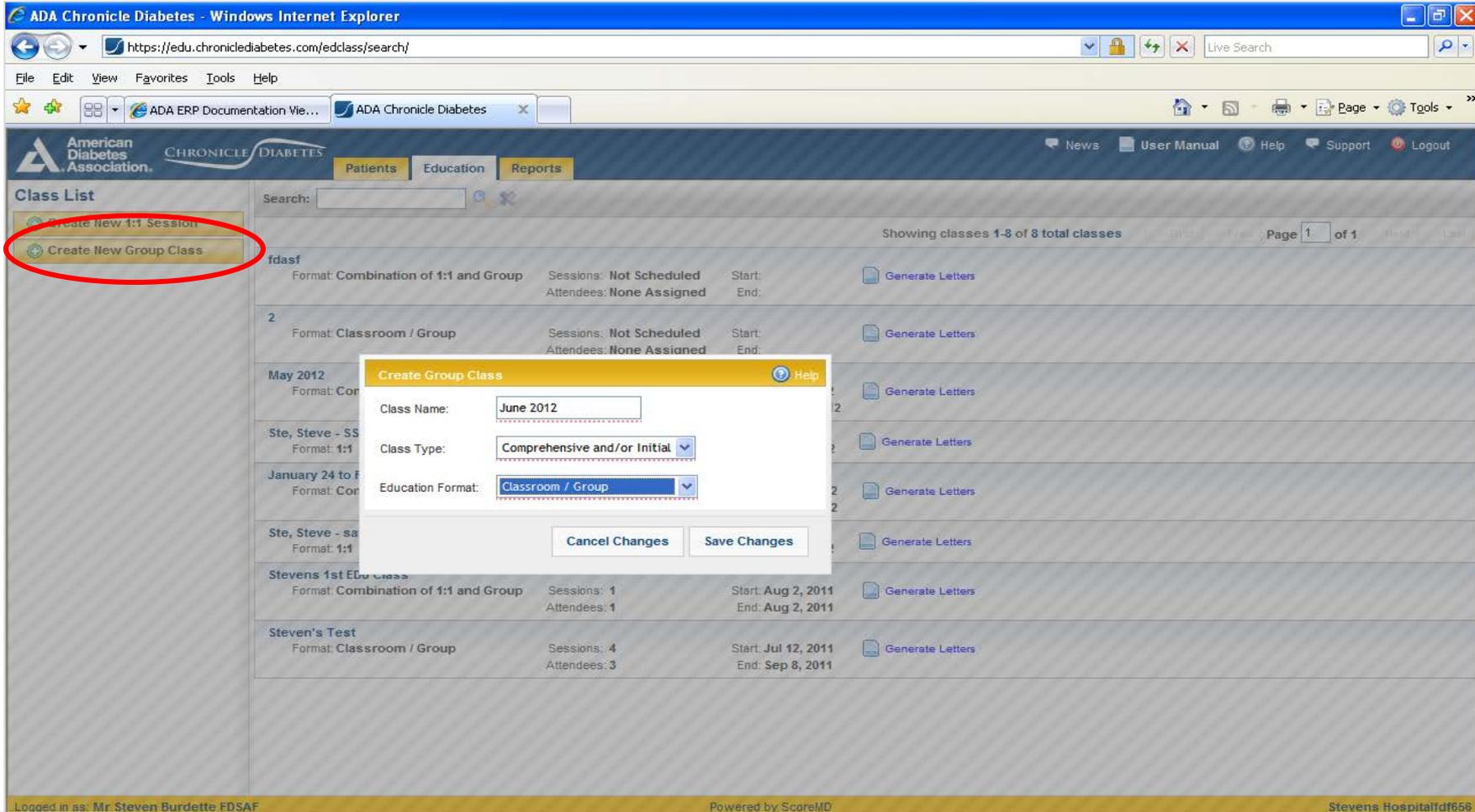
The screenshot shows a Windows Internet Explorer browser window displaying the ADA Chronicle Diabetes website. The browser's address bar shows the URL <https://edu.chroniclediabetes.com/edclass/search/>. The website's navigation menu includes 'Patients', 'Education', and 'Reports', with 'Education' highlighted by a red circle. The main content area displays a 'Class List' with a search bar and a table of classes. The table shows 8 total classes, with the first page displaying 1-8. The classes listed are:

Class Name	Format	Sessions	Attendees	Start/End	Action
fdasf	Combination of 1:1 and Group	Not Scheduled	None Assigned		Generate Letters
2	Classroom / Group	Not Scheduled	None Assigned		Generate Letters
May 2012	Combination of 1:1 and Group	3	1	May 4, 2012 - May 31, 2012	Generate Letters
Ste, Steve - SSS	1:1			Apr 11, 2012	Generate Letters
January 24 to February 28	Combination of 1:1 and Group	2	3	Jan 24, 2012 - Jan 25, 2012	Generate Letters
Ste, Steve - safsdaf	1:1			Jan 12, 2012	Generate Letters
Stevens 1st EDU Class	Combination of 1:1 and Group	1	1	Aug 2, 2011 - Aug 2, 2011	Generate Letters
Steven's Test	Classroom / Group	4	3	Jul 12, 2011 - Sep 8, 2011	Generate Letters

The footer of the page indicates the user is logged in as 'Mr Steven Burdette FDSAF', the site is powered by ScoreMD, and the user is at Stevens Hospital. The browser's status bar shows the URL <https://edu.chroniclediabetes.com/reports/> and the page is zoomed to 100%.

Creating a 1:1 or Group Class: Page 2 of 7

2. Click **Create New Class** on the left side of the page to bring up the window. Enter a name for the class. Examples could be "June 2012" or "June 2012 Friday AM". Choose a name that you will logically associate with this class. Enter the Class Type and Education Format and click Save Changes.



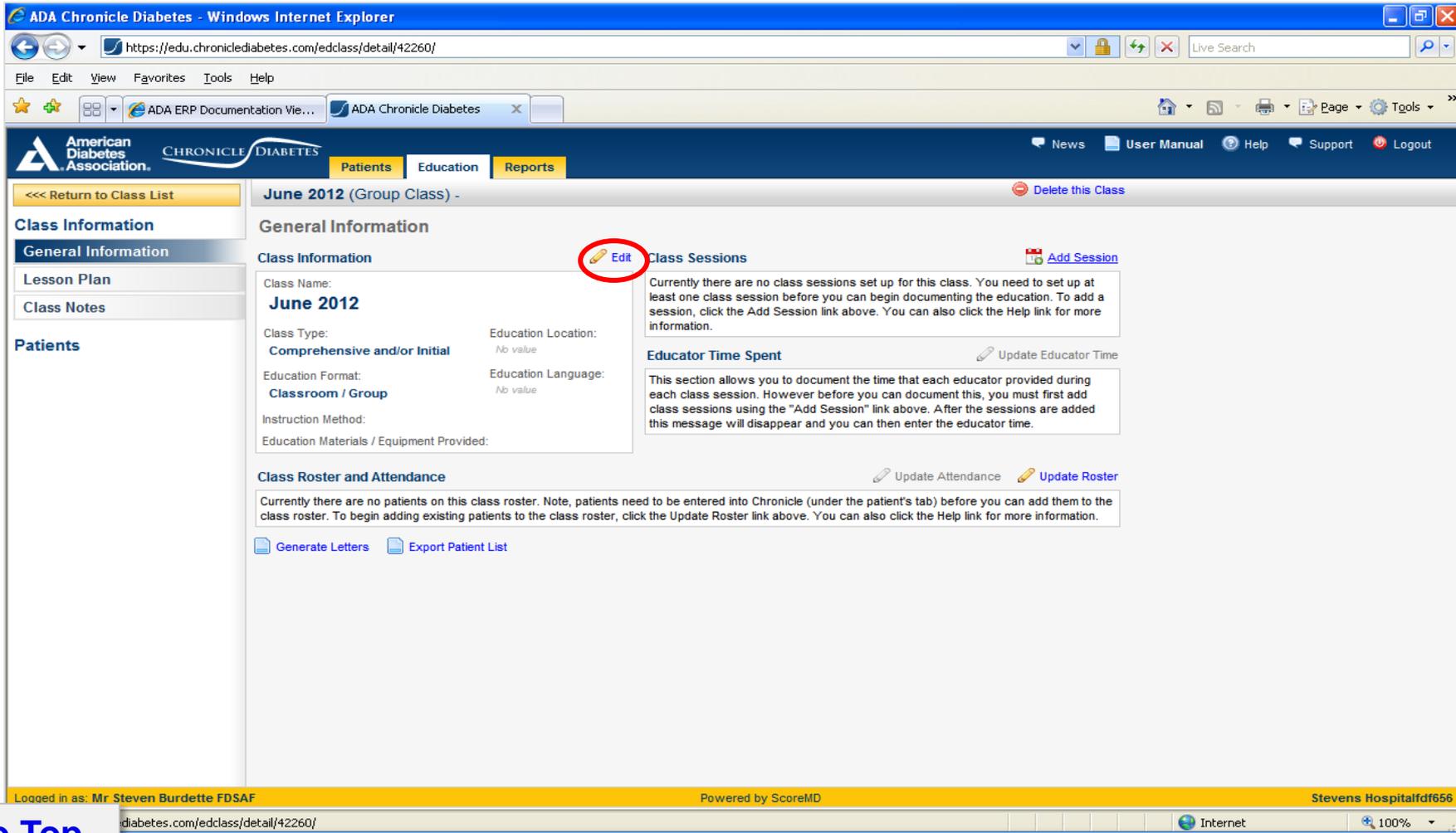
The screenshot shows the ADA Chronicle Diabetes website interface. The browser window title is "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chroniclediabetes.com/edclass/search/". The website header includes the American Diabetes Association logo and navigation tabs for "Patients", "Education", and "Reports". The "Class List" section is visible, showing a table of classes with columns for format, sessions, attendees, start/end dates, and a "Generate Letters" button. A red circle highlights the "Create New Group Class" link in the left sidebar. A modal dialog box titled "Create Group Class" is open, containing the following fields:

- Class Name:
- Class Type:
- Education Format:

Buttons for "Cancel Changes" and "Save Changes" are at the bottom of the dialog. The footer of the page indicates the user is logged in as "Mr Steven Burdette FDSAF" and the page is powered by ScoreMD.

Creating a 1:1 or Group Class: Page 3 of 7

3. Once you have created a new class, you can begin by adding the general class information by clicking the **Edit** pencil link above the Class Information box.



The screenshot shows the ADA Chronicle Diabetes website interface. The browser title is "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chroniclediabetes.com/edclass/detail/42260/". The page header includes the ADA logo, "CHRONICLE DIABETES", and navigation tabs for "Patients", "Education", and "Reports". The main content area is titled "June 2012 (Group Class) -" and includes a "Delete this Class" link. The "Class Information" section is highlighted, and the "Edit" pencil icon is circled in red. The "Class Information" section displays the following details:

- Class Name: **June 2012**
- Class Type: **Comprehensive and/or Initial**
- Education Location: *No value*
- Education Format: **Classroom / Group**
- Education Language: *No value*
- Instruction Method:
- Education Materials / Equipment Provided:

The "Class Sessions" section contains the text: "Currently there are no class sessions set up for this class. You need to set up at least one class session before you can begin documenting the education. To add a session, click the Add Session link above. You can also click the Help link for more information." The "Add Session" link is visible.

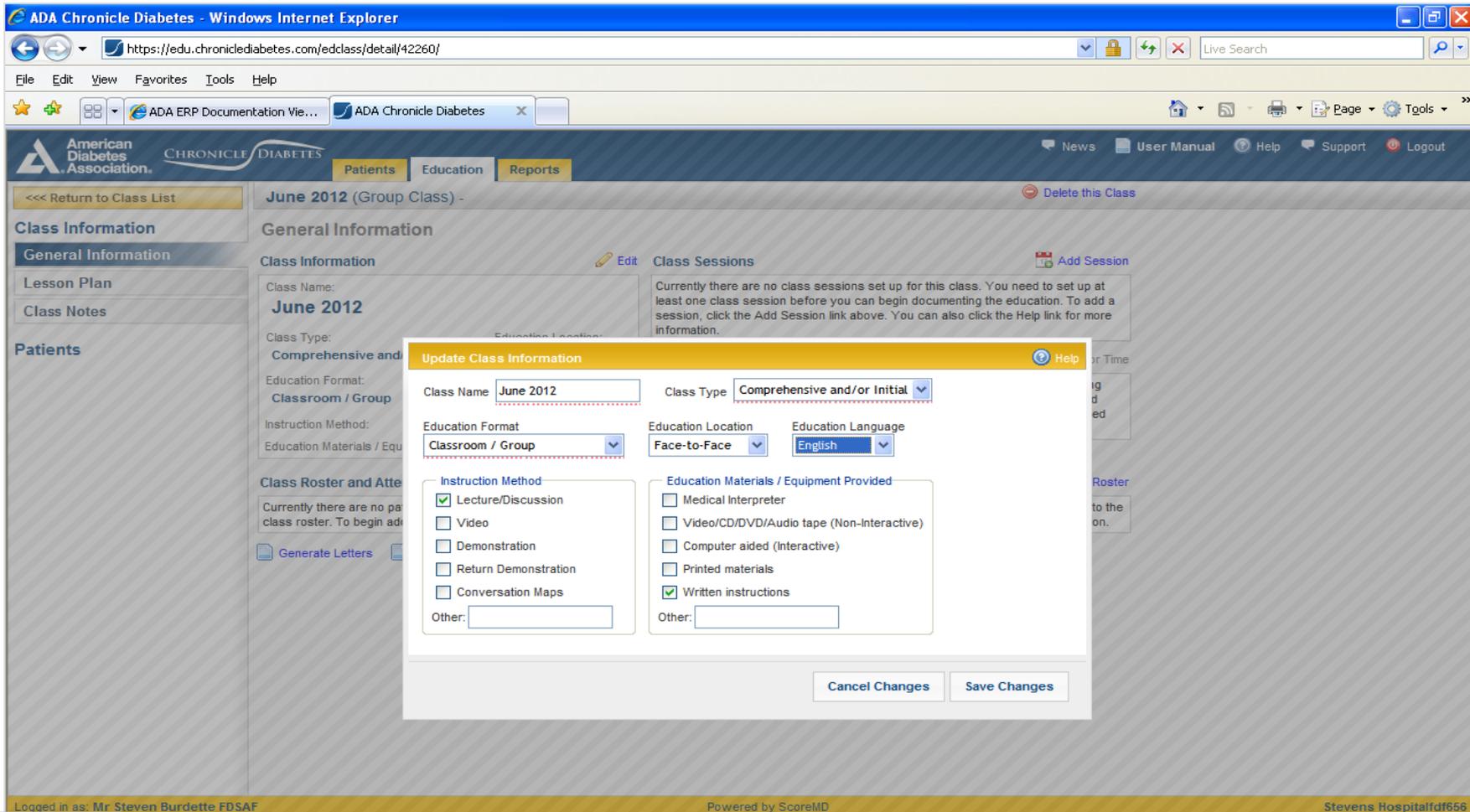
The "Educator Time Spent" section contains the text: "This section allows you to document the time that each educator provided during each class session. However before you can document this, you must first add class sessions using the 'Add Session' link above. After the sessions are added this message will disappear and you can then enter the educator time." The "Update Educator Time" link is visible.

The "Class Roster and Attendance" section contains the text: "Currently there are no patients on this class roster. Note, patients need to be entered into Chronicle (under the patient's tab) before you can add them to the class roster. To begin adding existing patients to the class roster, click the Update Roster link above. You can also click the Help link for more information." The "Update Attendance" and "Update Roster" links are visible.

At the bottom of the page, there are links for "Generate Letters" and "Export Patient List". The footer shows "Logged in as: Mr Steven Burdette FDSAF", "Powered by ScoreMD", and "Stevens Hospitaldf656".

Creating a 1:1 or Group Class: Page 4 of 7

4. Enter the Location, Language, instruction methods and any materials you are using, and then click Save Changes.



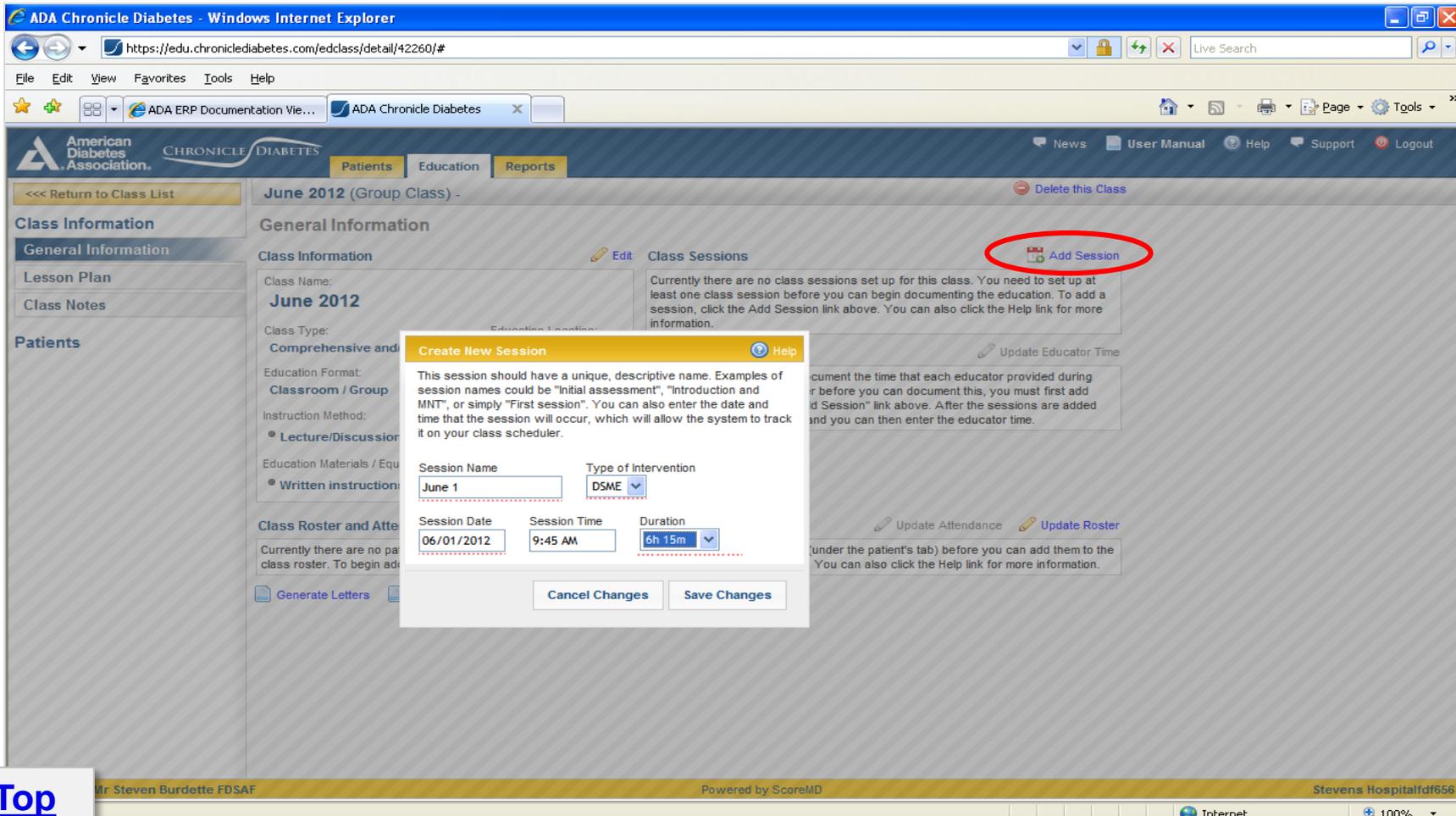
The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chroniclediabetes.com/edclass/detail/42260/". The page displays the "June 2012 (Group Class)" details. A modal dialog box titled "Update Class Information" is open, allowing for the following configuration:

- Class Name:** June 2012
- Class Type:** Comprehensive and/or Initial
- Education Format:** Classroom / Group
- Education Location:** Face-to-Face
- Education Language:** English
- Instruction Method:**
 - Lecture/Discussion
 - Video
 - Demonstration
 - Return Demonstration
 - Conversation Maps
 - Other:
- Education Materials / Equipment Provided:**
 - Medical Interpreter
 - Video/CD/DVD/Audio tape (Non-Interactive)
 - Computer aided (Interactive)
 - Printed materials
 - Written instructions
 - Other:

Buttons for "Cancel Changes" and "Save Changes" are located at the bottom of the dialog box. The background page shows the class name "June 2012", class type "Comprehensive and/or Initial", and a note that no class sessions are currently set up.

Creating a 1:1 or Group Class: Page 5 of 7

- Each class must have one or more sessions. A class that meets three times over the month of June will have three sessions. **Click the Add Sessions link** above the Class Schedule box to bring up the entry window. Enter a name for the session. Choose a name that you will logically associate with your class session. For example: "Welcome and Intro", "Pumps and Meters", or simply "Class 1".



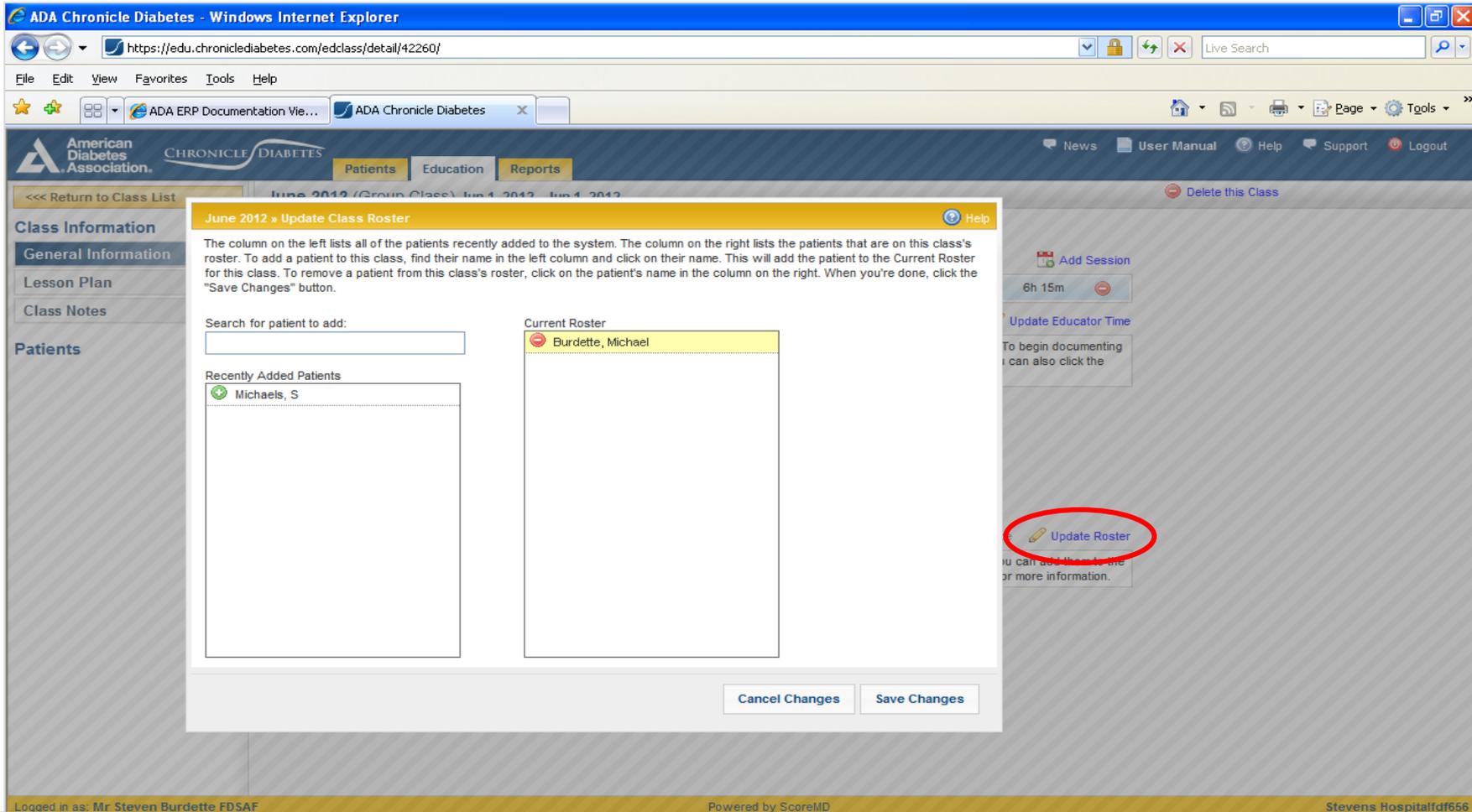
The screenshot shows the ADA Chronic Diabetes website interface. The browser title is "ADA Chronic Diabetes - Windows Internet Explorer" and the URL is "https://edu.chronicdiabetes.com/edclass/detail/42260/#". The page displays a class titled "June 2012 (Group Class)". The "Add Session" link is circled in red. A "Create New Session" dialog box is open, showing the following fields:

- Session Name: June 1
- Type of Intervention: DSME
- Session Date: 06/01/2012
- Session Time: 9:45 AM
- Duration: 6h 15m

The dialog box also includes "Cancel Changes" and "Save Changes" buttons. The background page shows the "Class Information" section with a message: "Currently there are no class sessions set up for this class. You need to set up at least one class session before you can begin documenting the education. To add a session, click the Add Session link above. You can also click the Help link for more information."

Creating a 1:1 or Group Class: Page 6 of 7

6. Above the Class Roster and Attendance box, click **Update Roster** to bring up the patient selector. In the left recently Added Patients list find each patient that will be in the class and click on the patient to move her to the Current Roster list. When you have selected all the patients in the class; click Save Changes.

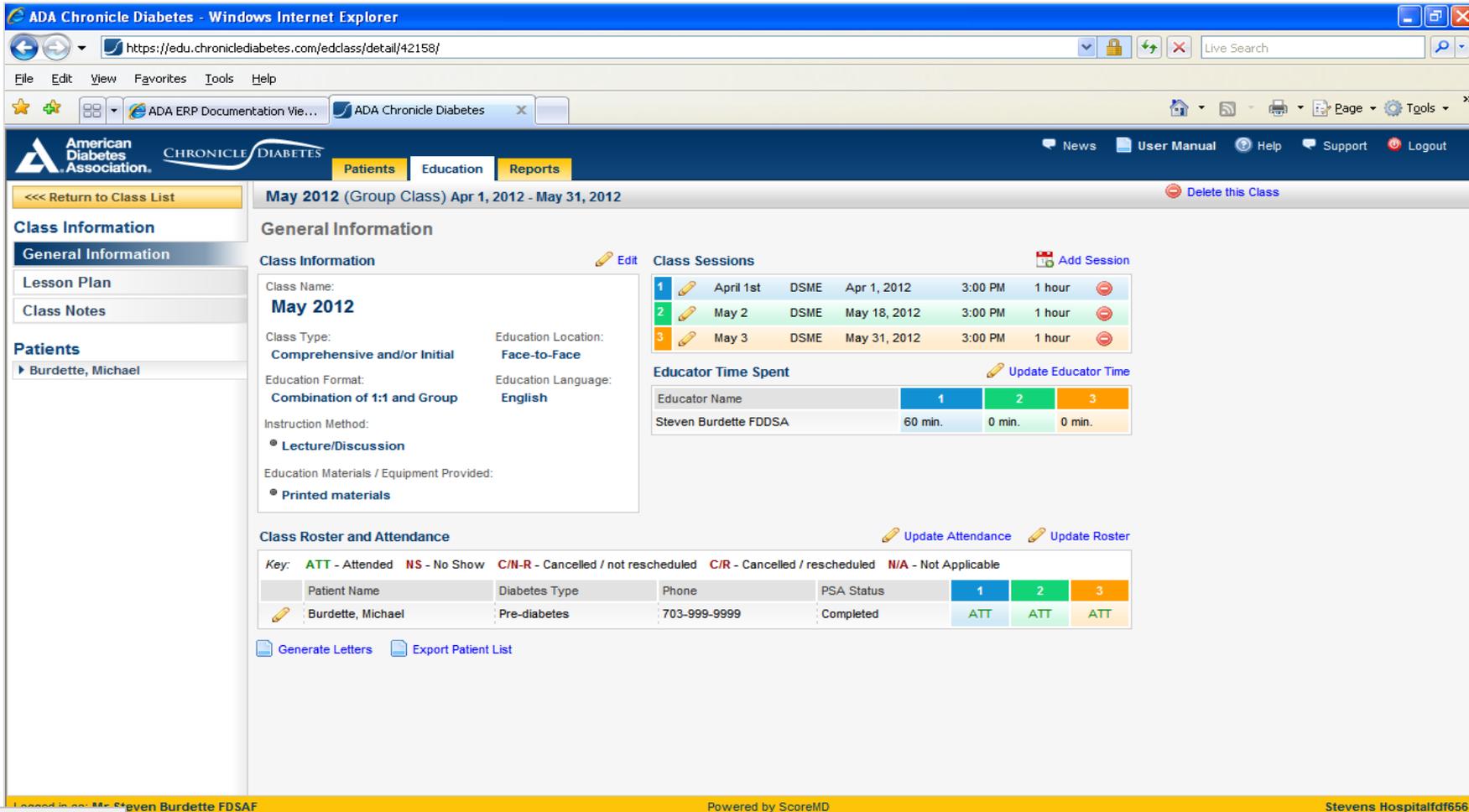


The screenshot shows a web browser window displaying the ADA Chronicle Diabetes application. The main page is titled "June 2012 (Group Class)" and includes a "Delete this Class" link. A modal dialog box titled "June 2012 » Update Class Roster" is open, providing instructions on how to manage the class roster. The dialog contains a search field, a "Recently Added Patients" list with "Michaels, S", and a "Current Roster" list with "Burdette, Michael". A red circle highlights the "Update Roster" button in the background. The footer of the application shows the user is logged in as "Mr Steven Burdette FDSAF" and the system is powered by ScoreMD.

ADA Chronicle Diabetes - Windows Internet Explorer
https://edu.chroniclediabetes.com/edclass/detail/42260/
File Edit View Favorites Tools Help
ADA ERP Documentation Vie... ADA Chronicle Diabetes x
News User Manual Help Support Logout
Patients Education Reports
<<< Return to Class List June 2012 (Group Class) Jun 1 2012 Jun 1 2012 Delete this Class
Class Information
General Information
Lesson Plan
Class Notes
Patients
June 2012 » Update Class Roster Help
The column on the left lists all of the patients recently added to the system. The column on the right lists the patients that are on this class's roster. To add a patient to this class, find their name in the left column and click on their name. This will add the patient to the Current Roster for this class. To remove a patient from this class's roster, click on the patient's name in the column on the right. When you're done, click the "Save Changes" button.
Search for patient to add:
Recently Added Patients
+ Michaels, S
Current Roster
- Burdette, Michael
Add Session
6h 15m
Update Educator Time
To begin documenting
can also click the
Update Roster
You can add the...
for more information.
Cancel Changes Save Changes
Logged in as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf658

Creating a 1:1 or Group Class: Page 7 of 7

On the **General Information** page of the record, the Class Roster and Attendance table lists each patient's attendance. Each colored column represents a specific class session as listed in the Class Schedule section. **Note:** By default all patients are marked as being in attendance (ATT) at each session.



ADA Chronicle Diabetes - Windows Internet Explorer
 https://edu.chroniclediabetes.com/edclass/detail/42158/

American Diabetes Association. CHRONICLE DIABETES

Patients Education Reports

News User Manual Help Support Logout

<<< Return to Class List **May 2012 (Group Class) Apr 1, 2012 - May 31, 2012** Delete this Class

Class Information

General Information

Lesson Plan

Class Notes

Patients

Burdette, Michael

General Information

Class Information Edit

Class Name: **May 2012**

Class Type: **Comprehensive and/or Initial** Education Location: **Face-to-Face**

Education Format: **Combination of 1:1 and Group** Education Language: **English**

Instruction Method:
 • **Lecture/Discussion**

Education Materials / Equipment Provided:
 • **Printed materials**

Class Sessions Add Session

	1	2	3
1	April 1st DSME Apr 1, 2012 3:00 PM 1 hour		
2	May 2 DSME May 18, 2012 3:00 PM 1 hour		
3	May 3 DSME May 31, 2012 3:00 PM 1 hour		

Educator Time Spent Update Educator Time

Educator Name	1	2	3
Steven Burdette FDDSA	60 min.	0 min.	0 min.

Class Roster and Attendance Update Attendance Update Roster

Key: **ATT** - Attended **NS** - No Show **C/N-R** - Cancelled / not rescheduled **C/R** - Cancelled / rescheduled **N/A** - Not Applicable

Patient Name	Diabetes Type	Phone	PSA Status	1	2	3
Burdette, Michael	Pre-diabetes	703-999-9999	Completed	ATT	ATT	ATT

Generate Letters Export Patient List

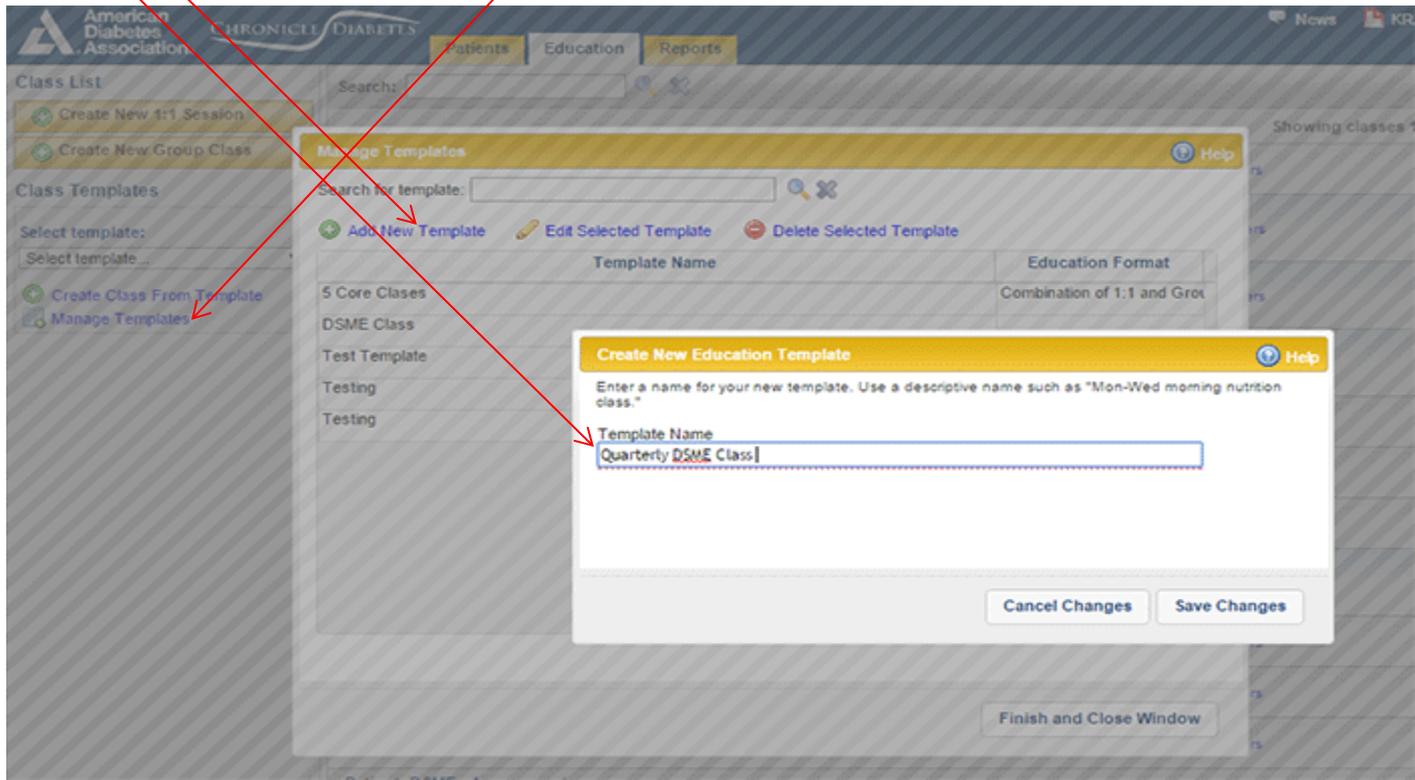
Logged in as: Mr. Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf656

Managing and Using Class Templates *Page 1 of 3*

Classes can be created “from scratch” or can be created from a class template that you can set up for a series of classes. In this section we will cover creating a class template and using that template to create a class.

To create a new class template:

- 1) From the Education Tab, Click the **Manage Templates** link
- 2) Click Add **New Template**
- 3) **Enter the name of the template** i.e. Quarterly DSME Class, click Save Changes



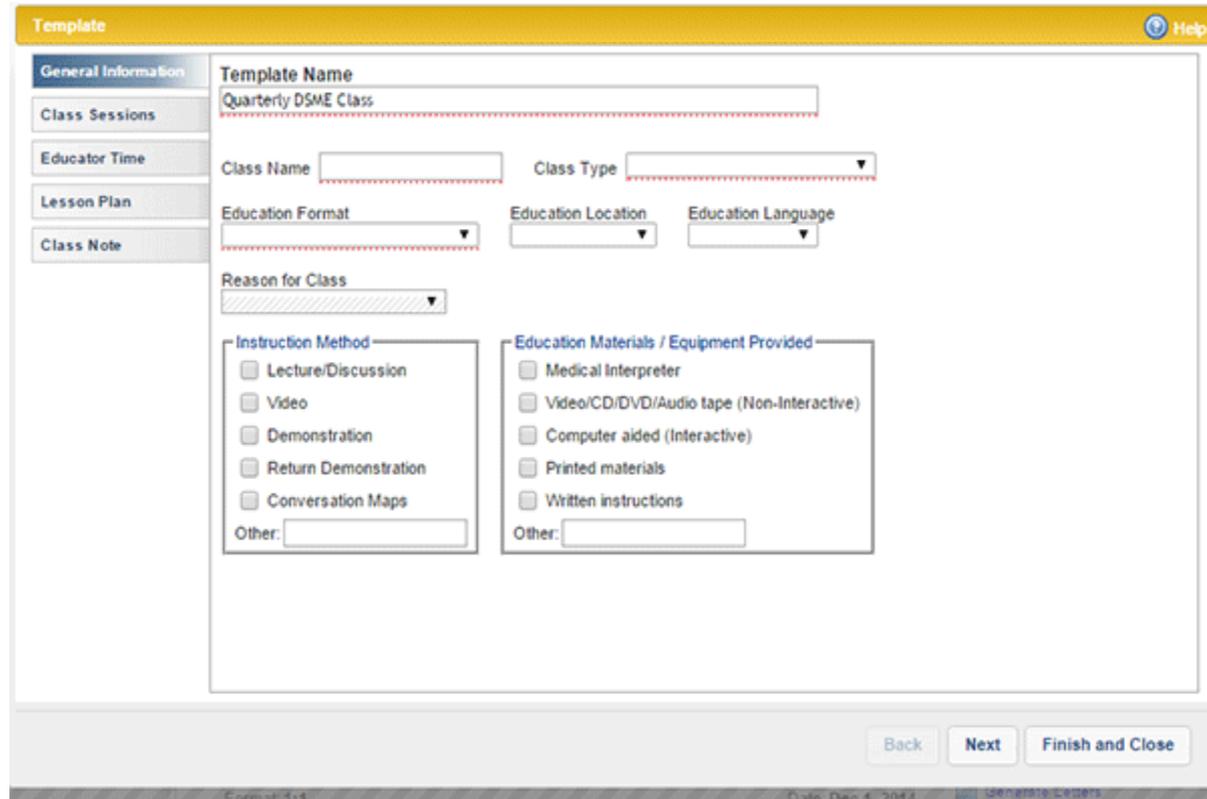
The screenshot displays the American Diabetes Association software interface. The 'Manage Templates' dialog box is open, showing a list of existing templates: '5 Core Classes', 'DSME Class', 'Test Template', 'Testing', and 'Testing'. The 'Add New Template' button is highlighted. A second dialog box, 'Create New Education Template', is also open, with the 'Template Name' field containing the text 'Quarterly DSME Class'. The 'Save Changes' button is visible at the bottom of this dialog box. Red arrows point from the text in the list above to the 'Manage Templates' link, the 'Add New Template' button, and the 'Template Name' field in the 'Create New Education Template' dialog box.

Template Name	Education Format
5 Core Classes	Combination of 1:1 and Gro
DSME Class	
Test Template	
Testing	
Testing	

Managing and Using Class Templates *Page 2 of 3*

You will now be on the tab where you can define the *General Information* for the class. Fill as much information out on this tab as will be common to all classes created with this template. **Nothing is required** (other than the *Template Name*), but the more information you fill out, the more information will be pre-populated when you create the class.

For example, if all classes created with this template will share the same Class Type, Education Format, Location, and Language, (but will differ on the Education Materials provided), then fill out all of the common fields.



The screenshot shows a web-based form titled "Template" with a yellow header bar containing a "Help" icon. The form is divided into several sections:

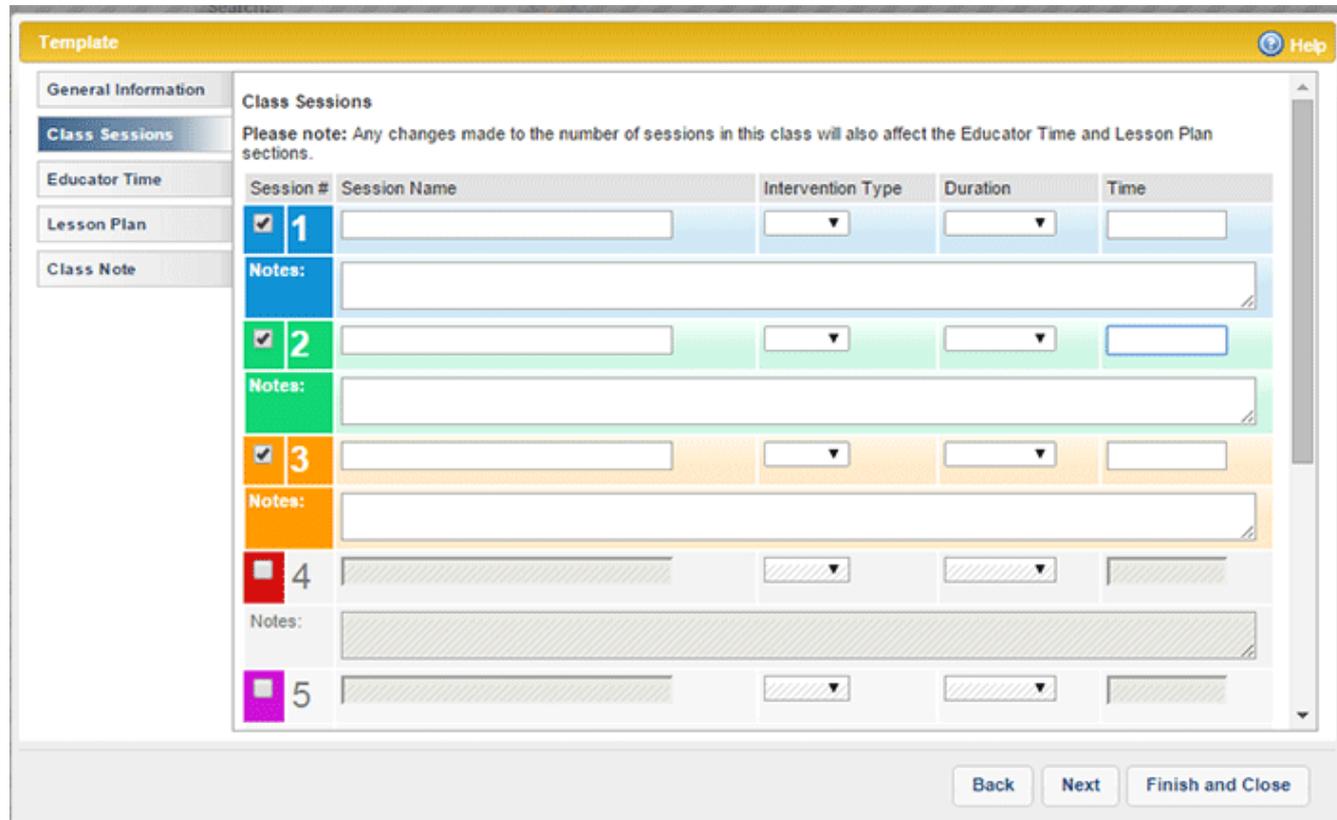
- General Information** (selected tab):
 - Template Name: Quarterly DSME Class
 - Class Name: [Text Field]
 - Class Type: [Dropdown Menu]
 - Education Format: [Dropdown Menu]
 - Education Location: [Dropdown Menu]
 - Education Language: [Dropdown Menu]
 - Reason for Class: [Dropdown Menu]
 - Instruction Method:
 - Lecture/Discussion
 - Video
 - Demonstration
 - Return Demonstration
 - Conversation Maps
 - Other: [Text Field]
 - Education Materials / Equipment Provided:
 - Medical Interpreter
 - Video/CD/DVD/Audio tape (Non-Interactive)
 - Computer aided (Interactive)
 - Printed materials
 - Written instructions
 - Other: [Text Field]
- Class Sessions**
- Educator Time**
- Lesson Plan**
- Class Note**

At the bottom of the form, there are three buttons: "Back", "Next", and "Finish and Close".

Managing and Using Class Templates *Page 3 of 3*

The **Class Sessions** tab allows you to define the sessions that each class will have. For each session give it a name, intervention type, duration, time, and a note. All of these are optional in the template, and can be added later when you're creating the class. The **Educator Time** tab allows you to define how much time each educator will contribute to each of the sessions. The **Lesson Plan** tab allows you to define which educational topics will be covered during each of the sessions. The **Class Note** tab allows you to enter a note that will apply to all patients in the class.

When you are done entering all of the information for the class template, click **Finish and Close**

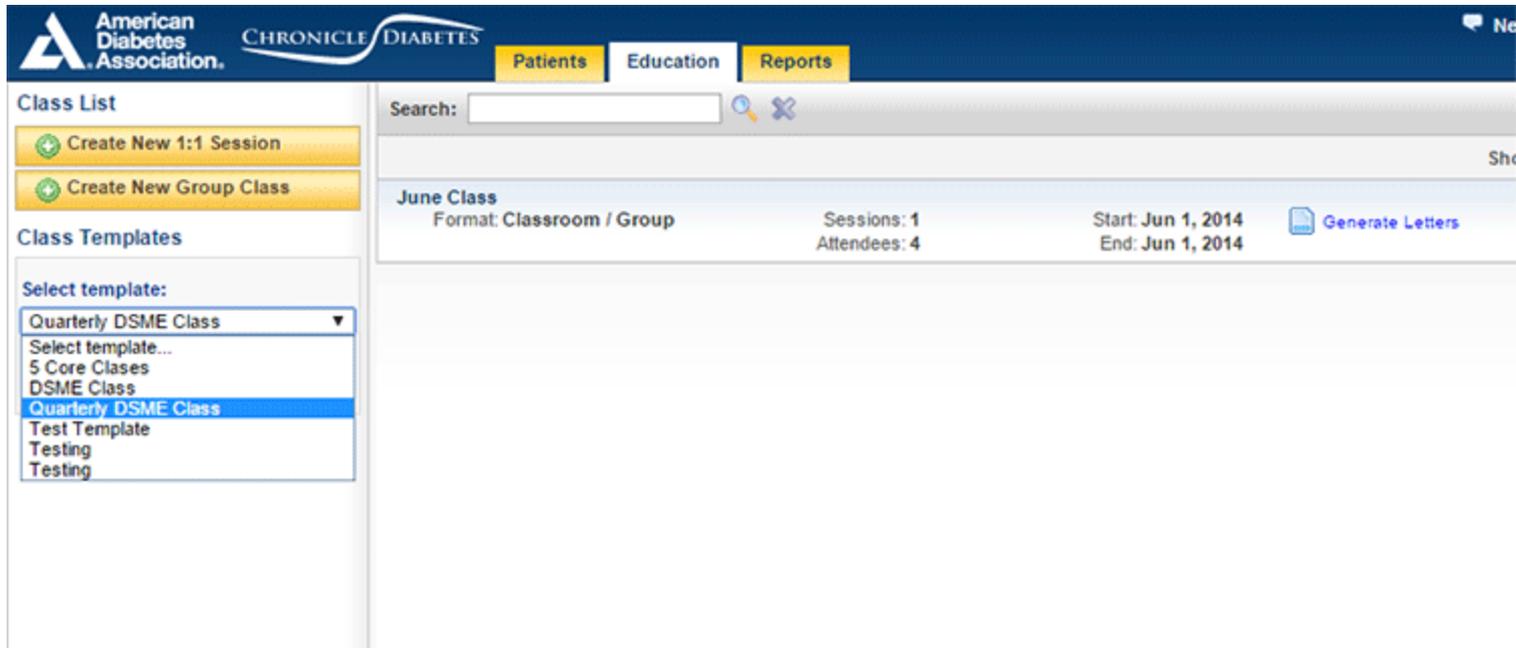


Session #	Session Name	Intervention Type	Duration	Time	Notes
<input checked="" type="checkbox"/> 1	<input type="text"/>				
<input checked="" type="checkbox"/> 2	<input type="text"/>				
<input checked="" type="checkbox"/> 3	<input type="text"/>				
<input type="checkbox"/> 4	<input type="text"/>				
<input type="checkbox"/> 5	<input type="text"/>				

Buttons: Back, Next, Finish and Close

Creating a new Class from a Class Template *Page 1 of 2*

To create a new class from an existing class template, select the class template from the dropdown list in the **Class Templates** section of the left navigation pane, then click **Create Class From Template**.



The screenshot shows the American Diabetes Association Chronic Diabetes management system interface. The top navigation bar includes the American Diabetes Association logo, the text "CHRONICLE DIABETES", and three tabs: "Patients", "Education", and "Reports". The "Education" tab is active.

On the left side, there is a "Class List" section with two buttons: "Create New 1:1 Session" and "Create New Group Class". Below this is the "Class Templates" section, which includes a "Select template:" dropdown menu. The dropdown menu is open, showing a list of templates: "Quarterly DSME Class" (selected), "Select template...", "5 Core Classes", "DSME Class", "Quarterly DSME Class", "Test Template", "Testing", and "Testing".

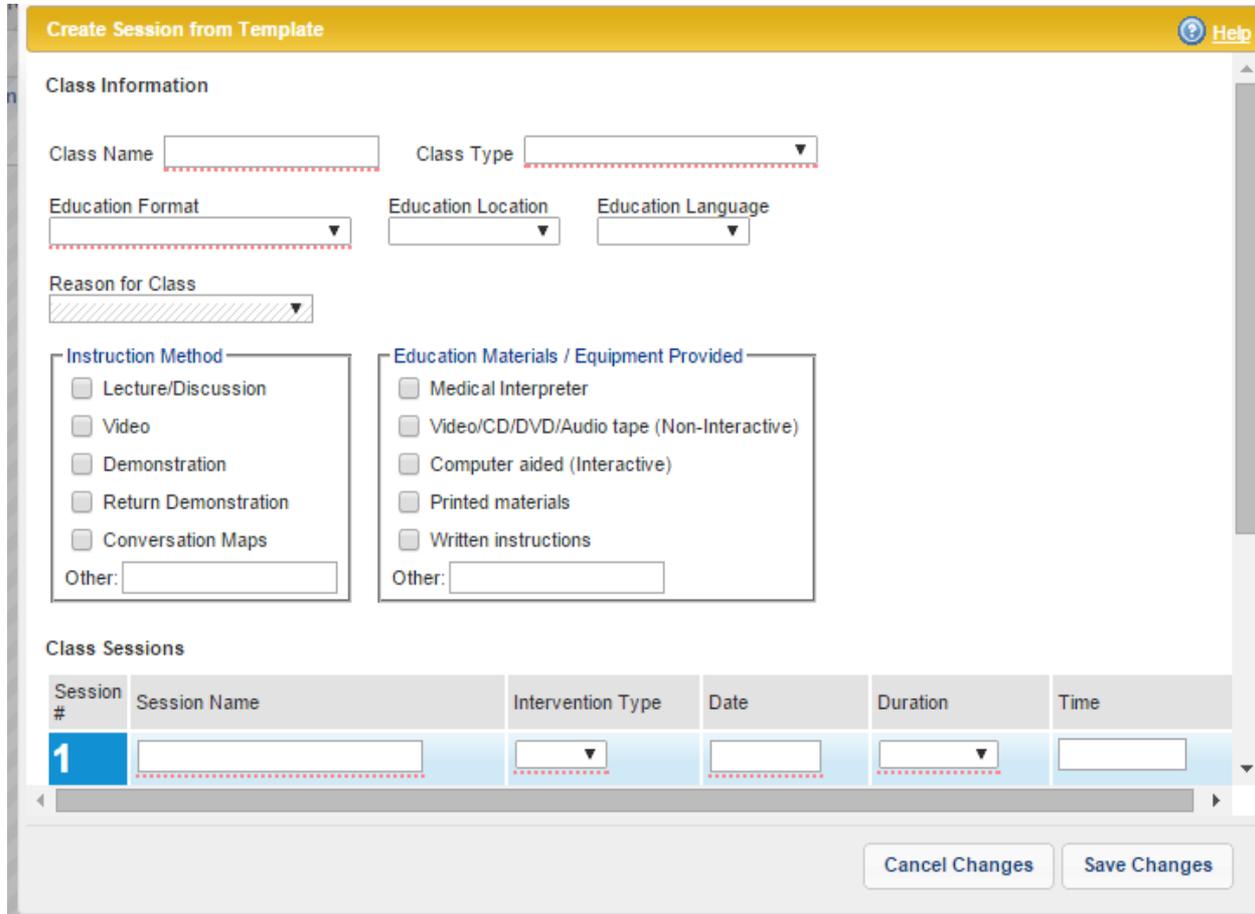
The main content area displays a search bar and a table of class information. The table has a search bar at the top and a "Show" button on the right. The table contains one row for a "June Class" with the following details:

Class Name	Format	Sessions	Attendees	Start Date	End Date	Action
June Class	Classroom / Group	1	4	Jun 1, 2014	Jun 1, 2014	Generate Letters

Creating a new Class from a Class Template *Page 2 of 2*

This will open up the **Create Class from Template** window, with all of the information from the template already populated into the class. Here you can add any additional information, making sure that all required fields (with red underlines) are completed. Note that if your class template included one or more sessions, you will need to fill in the session date for each session.

When all the class information is correct, click *Save Changes*, which will create the class and automatically open the class to the *General Information* page. **Next you can follow the normal class creation process by updating the patient roster.**



Create Session from Template Help

Class Information

Class Name Class Type

Education Format Education Location Education Language

Reason for Class

Instruction Method

Lecture/Discussion

Video

Demonstration

Return Demonstration

Conversation Maps

Other:

Education Materials / Equipment Provided

Medical Interpreter

Video/CD/DVD/Audio tape (Non-Interactive)

Computer aided (Interactive)

Printed materials

Written instructions

Other:

Class Sessions

Session #	Session Name	Intervention Type	Date	Duration	Time
1	<input type="text"/>				

Cancel Changes Save Changes

Class Template Tips

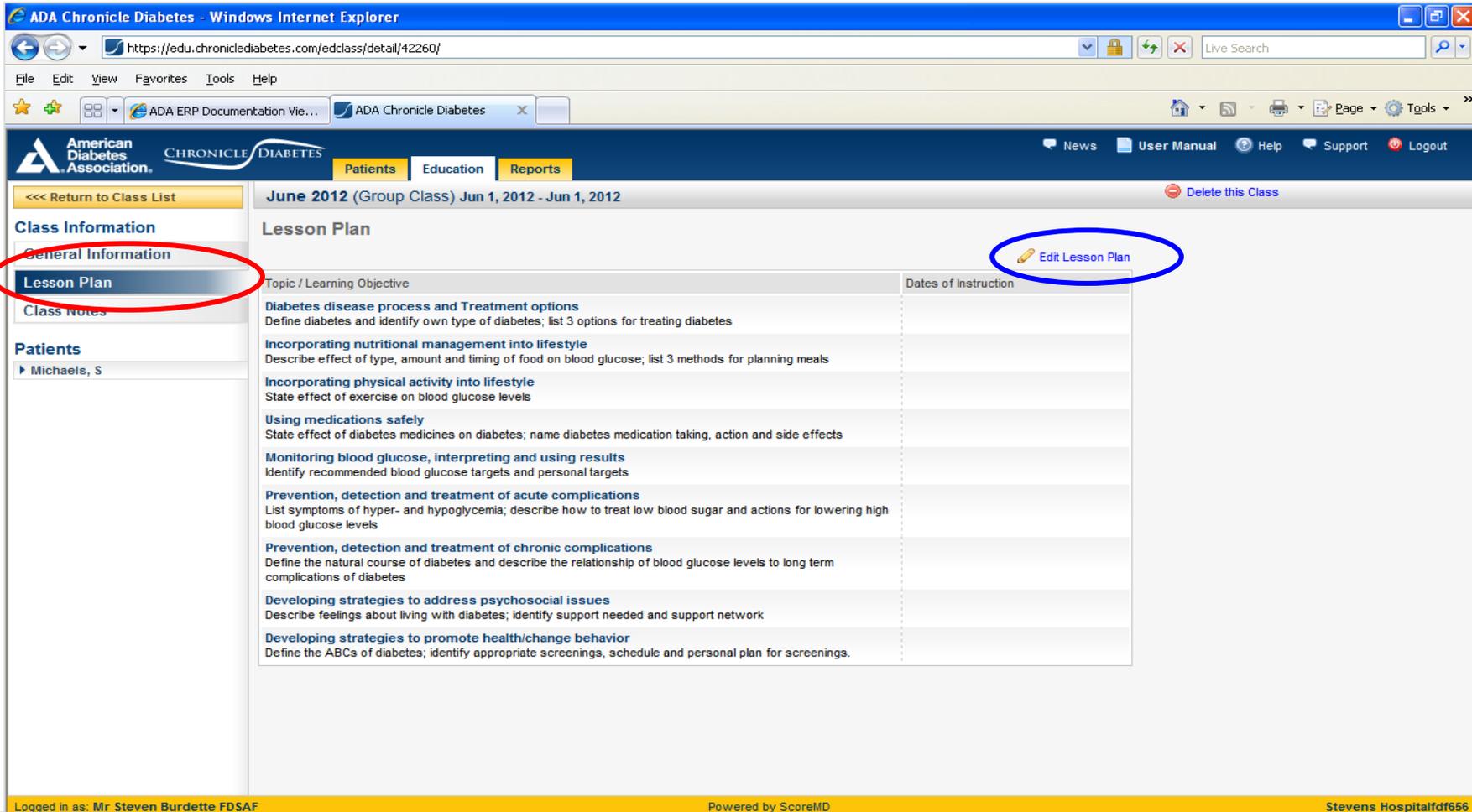
- It may be helpful to print and fill out the Class Template Worksheet below prior to creating a class template within Chronicle. **Download PDF Version**

	Class 1	Class 2	Class 3	Class 4	Class 5	Class 6
	1:1 or Group					
Class Time	Hours	Hours	Hours	Hours	Hours	Hours
Diabetes Disease Process						
Nutrition Management						
Physical Activity? Being Active						
Taking Medications						
SMBG						
Preventing Acute Complications						
Preventing Chronic Complications						
Psycho social adjustment/Healthy Coping						
Promoting Health						

Documenting Patient Education *Page 1 of 9*

Topics Covered During Class Session

1. Click the **Lesson Plan** tab on the left site of the page to view or setup the class's educational lesson plan. Click the **Edit Lesson Plan** link.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/edclass/detail/42260/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association. CHRONICLE DIABETES

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Patients Education Reports

<<< Return to Class List

June 2012 (Group Class) Jun 1, 2012 - Jun 1, 2012 Delete this Class

Class Information

General Information

Lesson Plan

Class Notes

Patients

Michaelis, S

Lesson Plan

Topic / Learning Objective	Dates of Instruction
Diabetes disease process and Treatment options Define diabetes and identify own type of diabetes; list 3 options for treating diabetes	
Incorporating nutritional management into lifestyle Describe effect of type, amount and timing of food on blood glucose; list 3 methods for planning meals	
Incorporating physical activity into lifestyle State effect of exercise on blood glucose levels	
Using medications safely State effect of diabetes medicines on diabetes; name diabetes medication taking, action and side effects	
Monitoring blood glucose, interpreting and using results Identify recommended blood glucose targets and personal targets	
Prevention, detection and treatment of acute complications List symptoms of hyper- and hypoglycemia; describe how to treat low blood sugar and actions for lowering high blood glucose levels	
Prevention, detection and treatment of chronic complications Define the natural course of diabetes and describe the relationship of blood glucose levels to long term complications of diabetes	
Developing strategies to address psychosocial issues Describe feelings about living with diabetes; identify support needed and support network	
Developing strategies to promote health/change behavior Define the ABCs of diabetes; identify appropriate screenings, schedule and personal plan for screenings.	

Edit Lesson Plan

Logged in as: Mr Steven Burdette FDSAF

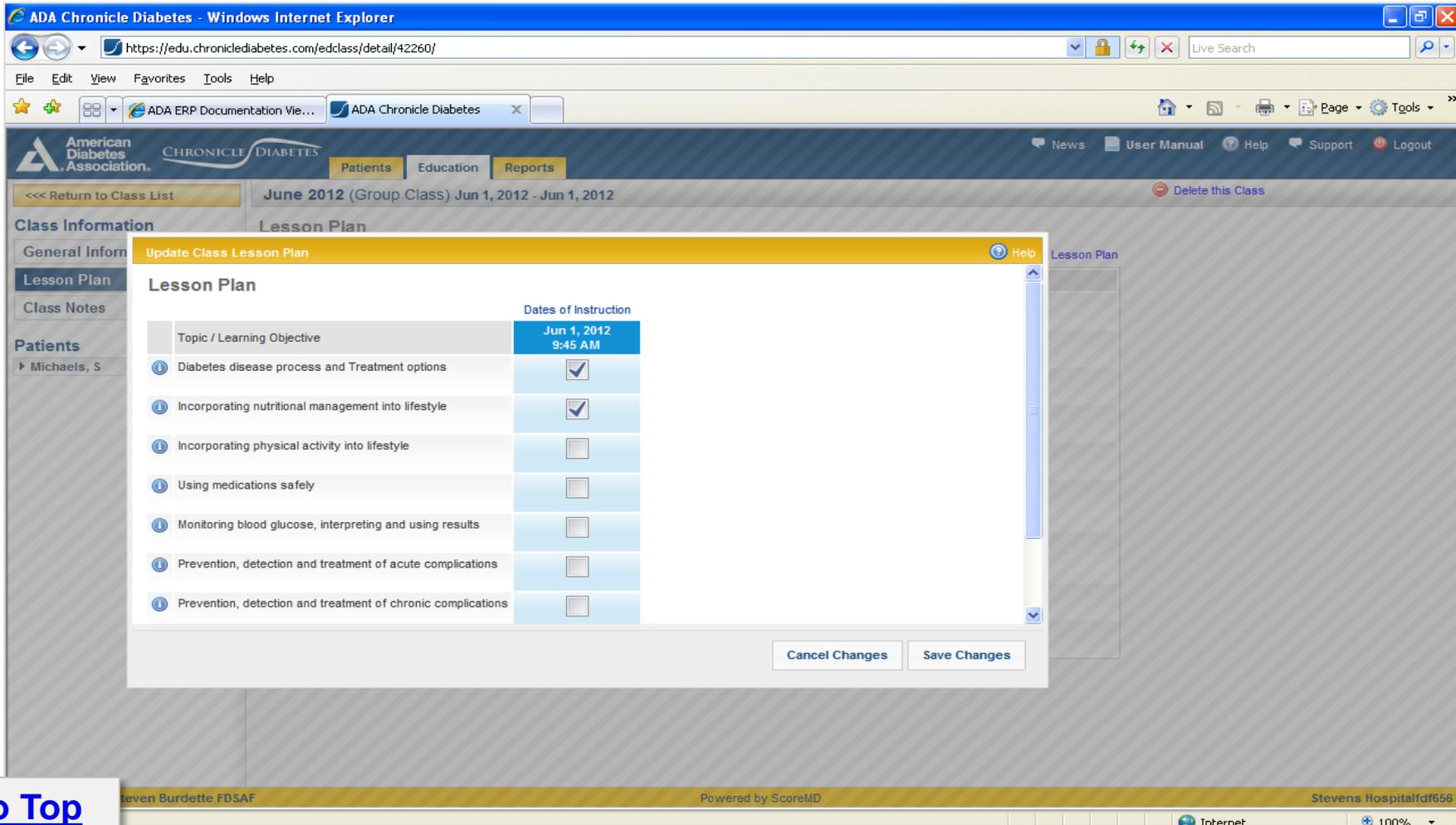
Powered by ScoreMD

Stevens Hospitaldf656

Documenting Patient Education *Page 2 of 9*

Topics Covered During Class Session

2. For each educational topic that will be address during the class, click the check box to the left of the topic under the appropriate session column. You can check multiple boxes for a topic if it will be taught during multiple sessions. (Note, completing the Lesson Plan can be done after the education has occurred.) Click Save Changes.



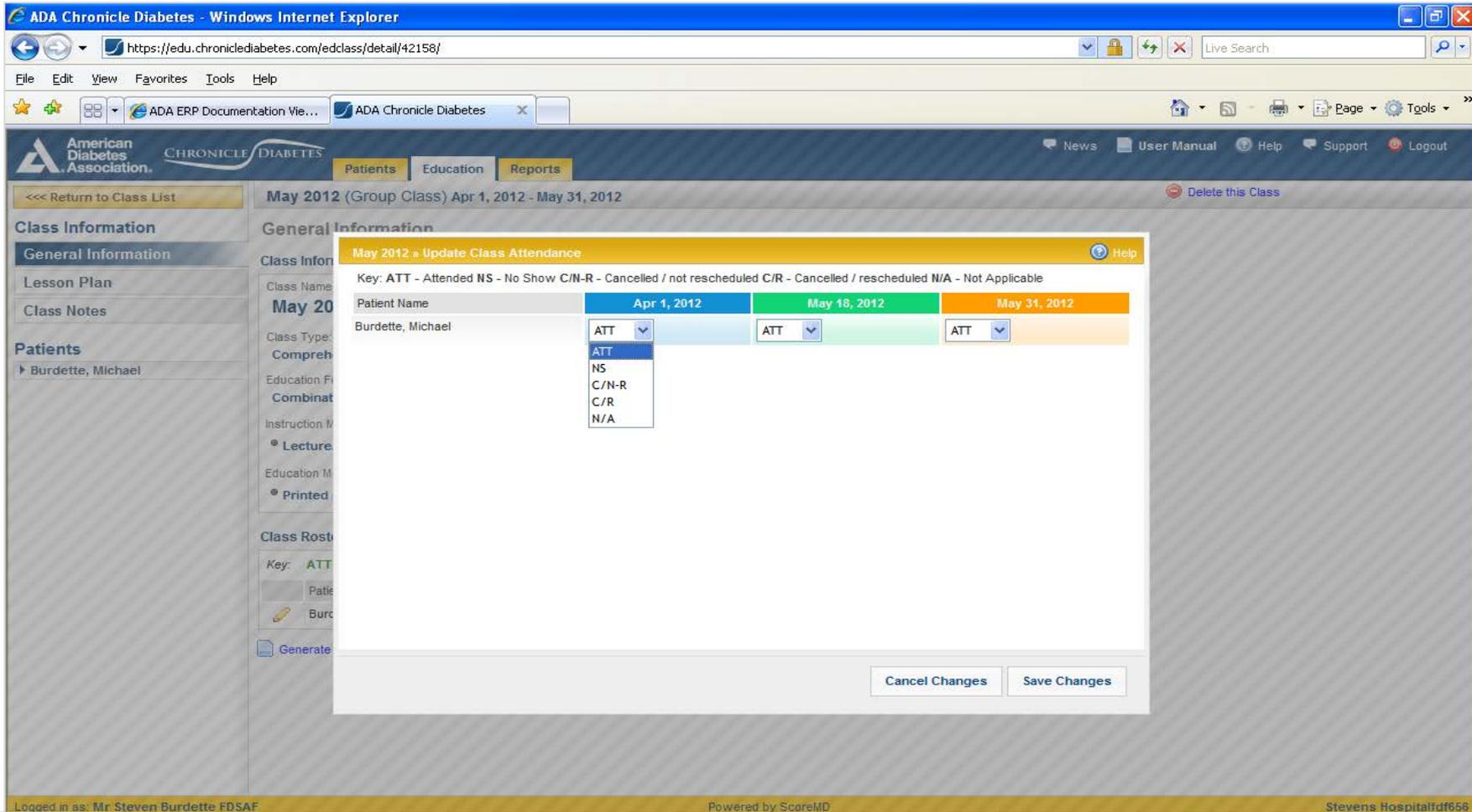
The screenshot shows the ADA Chronicle Diabetes website interface. The main content area displays the "Lesson Plan" update window for a class in June 2012. The window contains a table with the following data:

Topic / Learning Objective	Dates of Instruction
Diabetes disease process and Treatment options	Jun 1, 2012 9:45 AM <input checked="" type="checkbox"/>
Incorporating nutritional management into lifestyle	<input checked="" type="checkbox"/>
Incorporating physical activity into lifestyle	<input type="checkbox"/>
Using medications safely	<input type="checkbox"/>
Monitoring blood glucose, interpreting and using results	<input type="checkbox"/>
Prevention, detection and treatment of acute complications	<input type="checkbox"/>
Prevention, detection and treatment of chronic complications	<input type="checkbox"/>

At the bottom of the update window, there are two buttons: "Cancel Changes" and "Save Changes".

Documenting Patient Education Page 3 of 9

To update the **attendance**, within the *General Information* section of the class, click the Update Attendance link to bring up the Update Class Attendance window. To change a patient's attendance status as a session, click the dropdown list under the respective class session and change the appropriate value. Repeat this until all patients attendance is correct, then click Save Changes.



ADA Chronicle Diabetes - Windows Internet Explorer
 https://edu.chroniclediabetes.com/edclass/detail/42158/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES

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Patients Education Reports

<<< Return to Class List

May 2012 (Group Class) Apr 1, 2012 - May 31, 2012 Delete this Class

Class Information

General Information

Lesson Plan

Class Notes

Patients

Burdette, Michael

May 2012 » Update Class Attendance Help

Key: ATT - Attended NS - No Show C/N-R - Cancelled / not rescheduled C/R - Cancelled / rescheduled N/A - Not Applicable

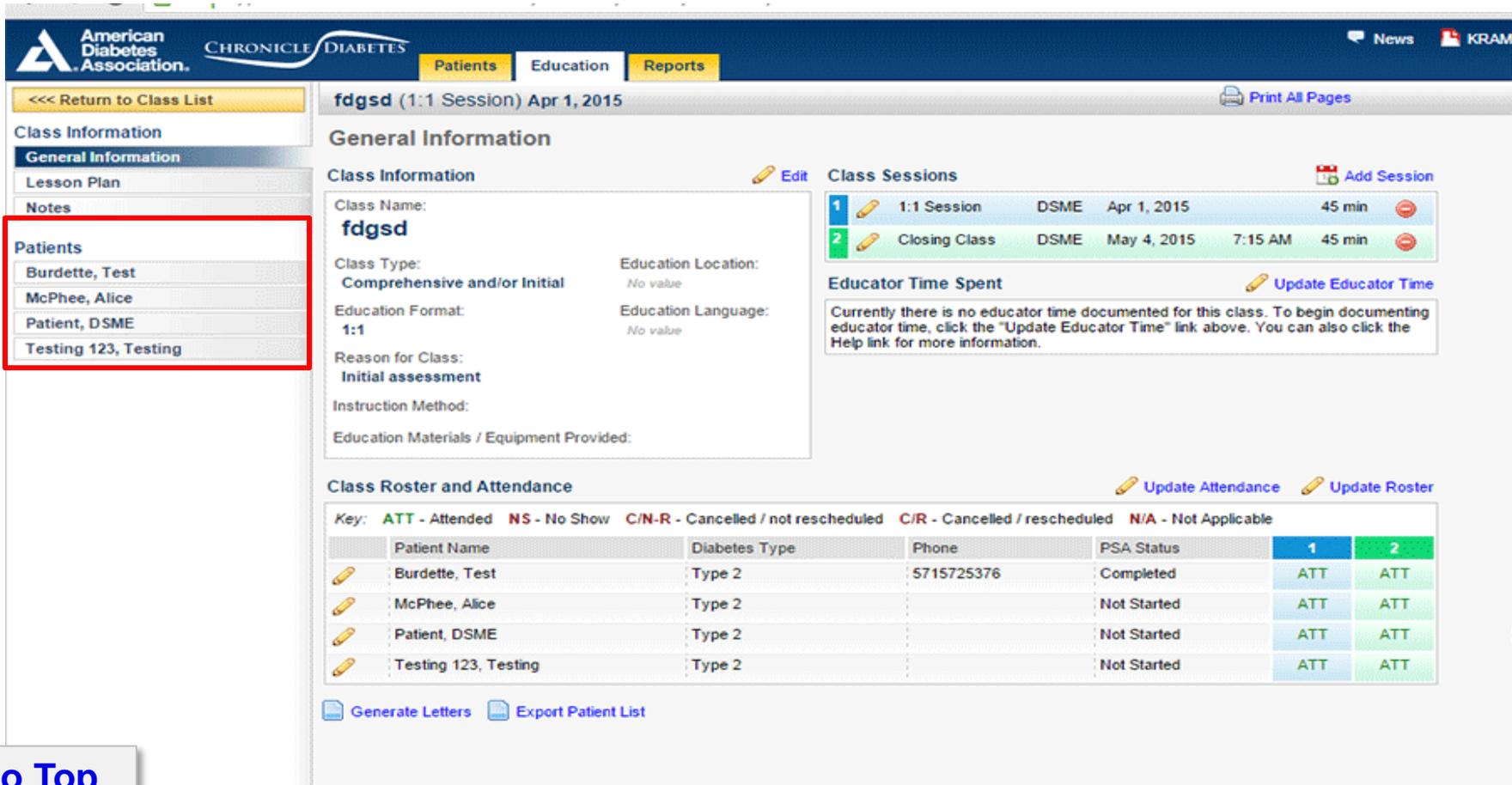
Patient Name	Apr 1, 2012	May 18, 2012	May 31, 2012
Burdette, Michael	ATT	ATT	ATT

Cancel Changes Save Changes

Logged in as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf658

Documenting Patient Education Page 4 of 9

Individual Pre-Assessment and Post Education Evaluation are done on a patient-by-patient basis. If you are currently in the class record, click on the **patients name** in the left menu to update patient education record (example below). If you are in a patient record, the education record is located in the *DSME & Follow-up* section. **Please continue to the next page for pre assessment & post education evaluation documentation.**



The screenshot shows the 'American Diabetes Association' website interface for managing patient education. The top navigation bar includes 'Patients', 'Education', and 'Reports'. The left sidebar contains a menu with 'Patients' highlighted in a red box, listing 'Burdette, Test', 'McPhee, Alice', 'Patient, DSME', and 'Testing 123, Testing'. The main content area displays details for a class named 'fdgsd' (1:1 Session) on April 1, 2015. The 'General Information' section includes class name, type ('Comprehensive and/or Initial'), format ('1:1'), and reason for class ('Initial assessment'). The 'Class Sessions' table shows two sessions: a 1:1 session on April 1, 2015, and a closing class on May 4, 2015. The 'Educator Time Spent' section indicates no time is currently documented. The 'Class Roster and Attendance' table lists four patients: Burdette, Test; McPhee, Alice; Patient, DSME; and Testing 123, Testing, all with 'Type 2' diabetes and 'Not Started' PSA status. Attendance is recorded as 'ATT' for both sessions. At the bottom, there are links for 'Generate Letters' and 'Export Patient List'.

Class Information

Class Name: **fdgsd**

Class Type: **Comprehensive and/or Initial**

Education Format: **1:1**

Reason for Class: **Initial assessment**

Instruction Method:

Education Materials / Equipment Provided:

Class Sessions

Session	Type	Location	Date	Time	Duration
1	1:1 Session	DSME	Apr 1, 2015		45 min
2	Closing Class	DSME	May 4, 2015	7:15 AM	45 min

Educator Time Spent

Currently there is no educator time documented for this class. To begin documenting educator time, click the "Update Educator Time" link above. You can also click the Help link for more information.

Class Roster and Attendance

Key: **ATT** - Attended **NS** - No Show **C/N-R** - Cancelled / not rescheduled **C/R** - Cancelled / rescheduled **N/A** - Not Applicable

Patient Name	Diabetes Type	Phone	PSA Status	1	2
Burdette, Test	Type 2	5715725376	Completed	ATT	ATT
McPhee, Alice	Type 2		Not Started	ATT	ATT
Patient, DSME	Type 2		Not Started	ATT	ATT
Testing 123, Testing	Type 2		Not Started	ATT	ATT

[Generate Letters](#) [Export Patient List](#)

Documenting Patient Education *Page 5 of 9*

The **DSME & Follow Up Section** shows all of the educational information for this patient. You will never need to leave this page to document this patient's educational assessment. **Note** that creating new classes (and class sessions), defining the lesson plan, and managing the roster and attendance are still done under the main top yellow *Education* tab.

DSME & Follow-Up

Education Summary New 1:1

2012 Mar Mon AM (Group Class) Edit

Location: ABC DSME Center

#	Date	Topic	Status
1	Mar 5, 2012	Intro	Attended
2	Mar 12, 2012	Main info	Attended
3	Mar 19, 2012	Conclusion	Attended

Addelson, Margaret - Initial assessment (1:1 Session) Edit

Location: ABC DSME Center

#	Date	Session	Status
1	Mar 1, 2012	1:1 Session	Attended

Follow-Up Summary New Follow-Up

F/U Date	Method	Clinician
Jun 13, 2012	Phone	Ellen Educator
Aug 1, 2012	Phone	Ellen Educator

Patient Education Record

Key:	1 - Needs instruction	2 - Needs review	3 - Comprehends key points	4 - Demonstrates competency	N/A - Not applicable
Topic / Learning Objective	Pre Assess.	Post Eval.	F/Up (6/13/12)	F/Up (8/1/12)	
Disease Process	1	3	4	3	
Nutritional Management	2	4	3	4	
Physical Activity/Being Active	2	4	4	3	
Taking medications	1	4	4	2	
Monitoring	1	4	4	3	
Acute complications/Problem Solving	1	4	3	3	
Psychosocial Adjustment/healthy Coping	1	4	3	3	
Promote health/change behavior	1	4	4	2	

Education Plan New Education Plan

Current Education Plan

Documented during: 2012 Mar Mon AM (3/5/12 - 3/19/12) Edit Education Plan Delete Education Plan

Attended 7 hr comprehensive DM class. Has appt for initial 1 hr time with RD and RN. Will continue to FU with 30 min appt - q 3 months.

Previous Education Plans

DSMS Plan New DSMS Plan

Current DSMS Plan

Documented during: F/Up (8/1/12) Edit DSMS Plan Delete DSMS Plan

Ongoing contact with PCP regarding insulin adjustments. Mayo clinic and ADA materials for the blind. Pt has already ordered materials.

Previous DSMS Plans

Identified Barriers to learning/adherence to self management plan New Entry

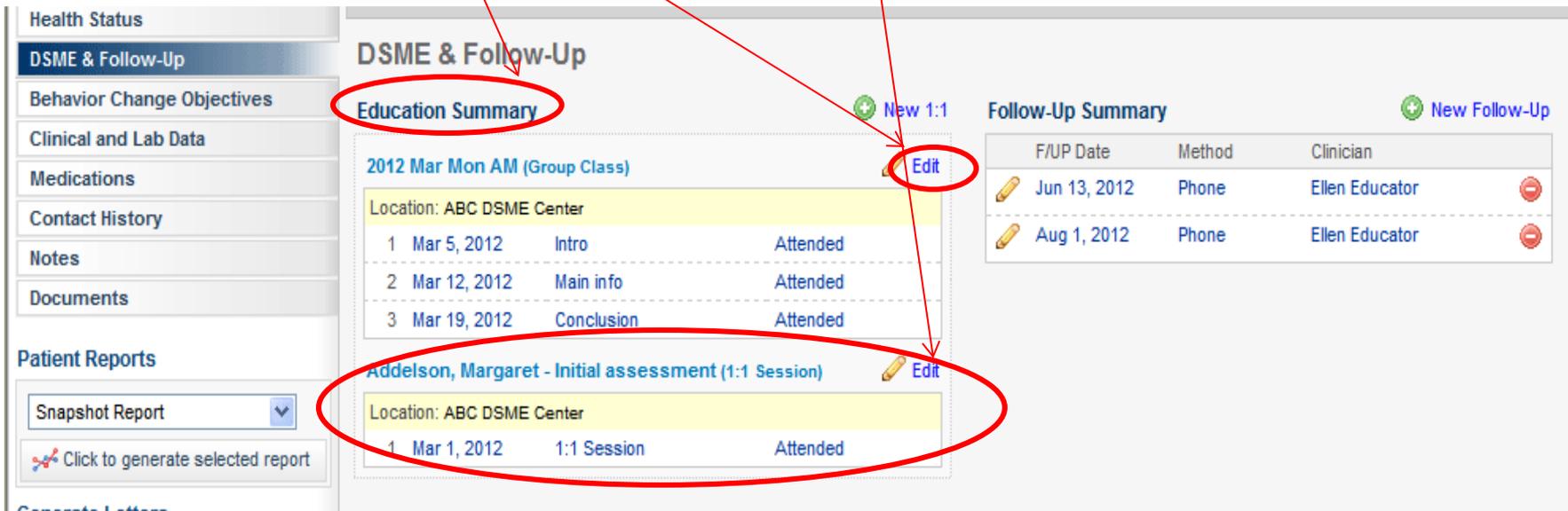
Current Entry

Documented during: Initial assessment (3/1/12) Edit Entry Delete Entry

Has no insurance. Lives in a rural community with no gym

Documenting Patient Education Page 6 of 9

The **Education Summary** box lists all of the classes that this patient is on the *Roster* for. Clicking the **Edit** pencil next to a class will open that class's record (under the main top yellow *Education* tab) where you can make changes to the class's information (e.g. edit general information, add sessions, update roster and attendance, complete lesson plan, etc.). Note that every time you meet with a patient (e.g. for an **initial assessment**, a group class, or for additional education), that meeting is considered a class and should be added to the patient's record as a class (not a follow-up).

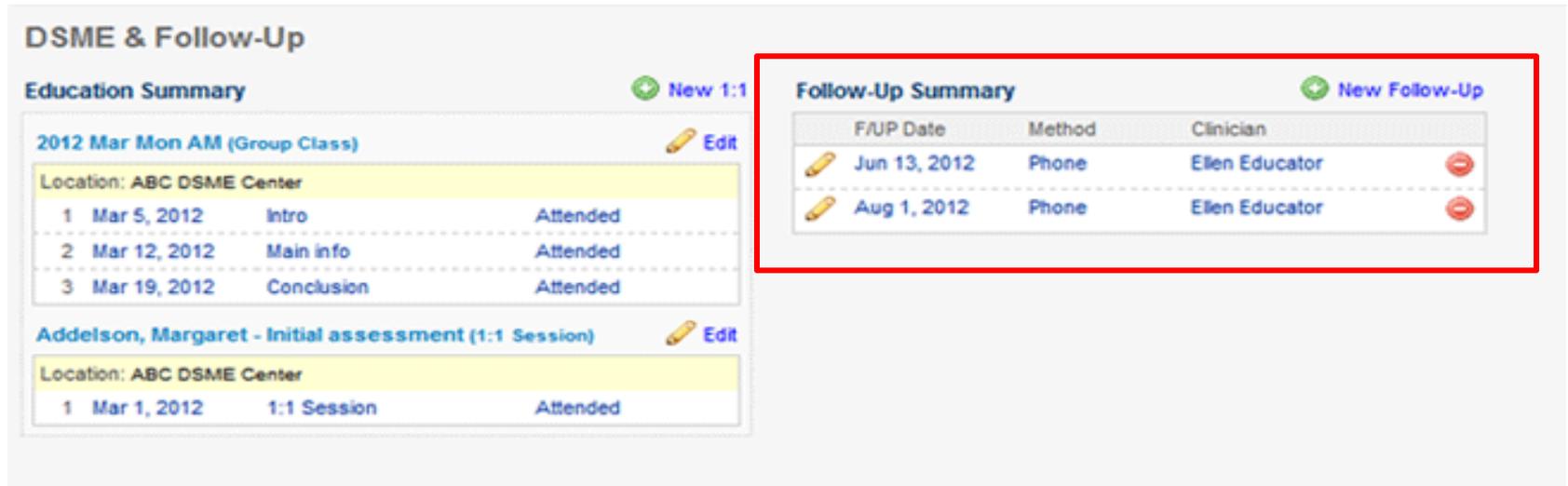


The screenshot displays the patient management interface. On the left is a navigation menu with options like Health Status, DSME & Follow-Up, Behavior Change Objectives, Clinical and Lab Data, Medications, Contact History, Notes, Documents, Patient Reports, and Generate Letters. The main content area is titled 'DSME & Follow-Up' and contains two sections: 'Education Summary' and 'Follow-Up Summary'. The 'Education Summary' section shows a group class for '2012 Mar Mon AM' and a 1:1 session for 'Addelson, Margaret - Initial assessment'. The 'Follow-Up Summary' section shows two follow-up appointments. Red circles highlight the 'Education Summary' link and the 'Addelson, Margaret - Initial assessment' entry, with red arrows pointing to the 'Edit' pencil icons.

F/UP Date	Method	Clinician	
Jun 13, 2012	Phone	Ellen Educator	⊖
Aug 1, 2012	Phone	Ellen Educator	⊖

Documenting Patient Education Page 7 of 9

The top right **Follow-Up Summary** box lists all of the follow-ups that have occurred with this patient. A patient can have any number of follow-ups. At each follow-up you can document an educational reassessment and make updates to the education plan, barriers to learning, and the DSMS plan. Note that follow-ups are not used when you meet with a patient to provide education. Follow-ups are intended to allow you to document when you follow-up with a patient to reassess their progress (e.g. three to six months after education). You can add a new follow-up by clicking the *New Follow-up* link and filling out the reassessment information.



DSME & Follow-Up

Education Summary ➕ New 1:1

2012 Mar Mon AM (Group Class) ✎ Edit

Location: ABC DSME Center

	Date	Topic	Status
1	Mar 5, 2012	Intro	Attended
2	Mar 12, 2012	Main info	Attended
3	Mar 19, 2012	Conclusion	Attended

Addelson, Margaret - Initial assessment (1:1 Session) ✎ Edit

Location: ABC DSME Center

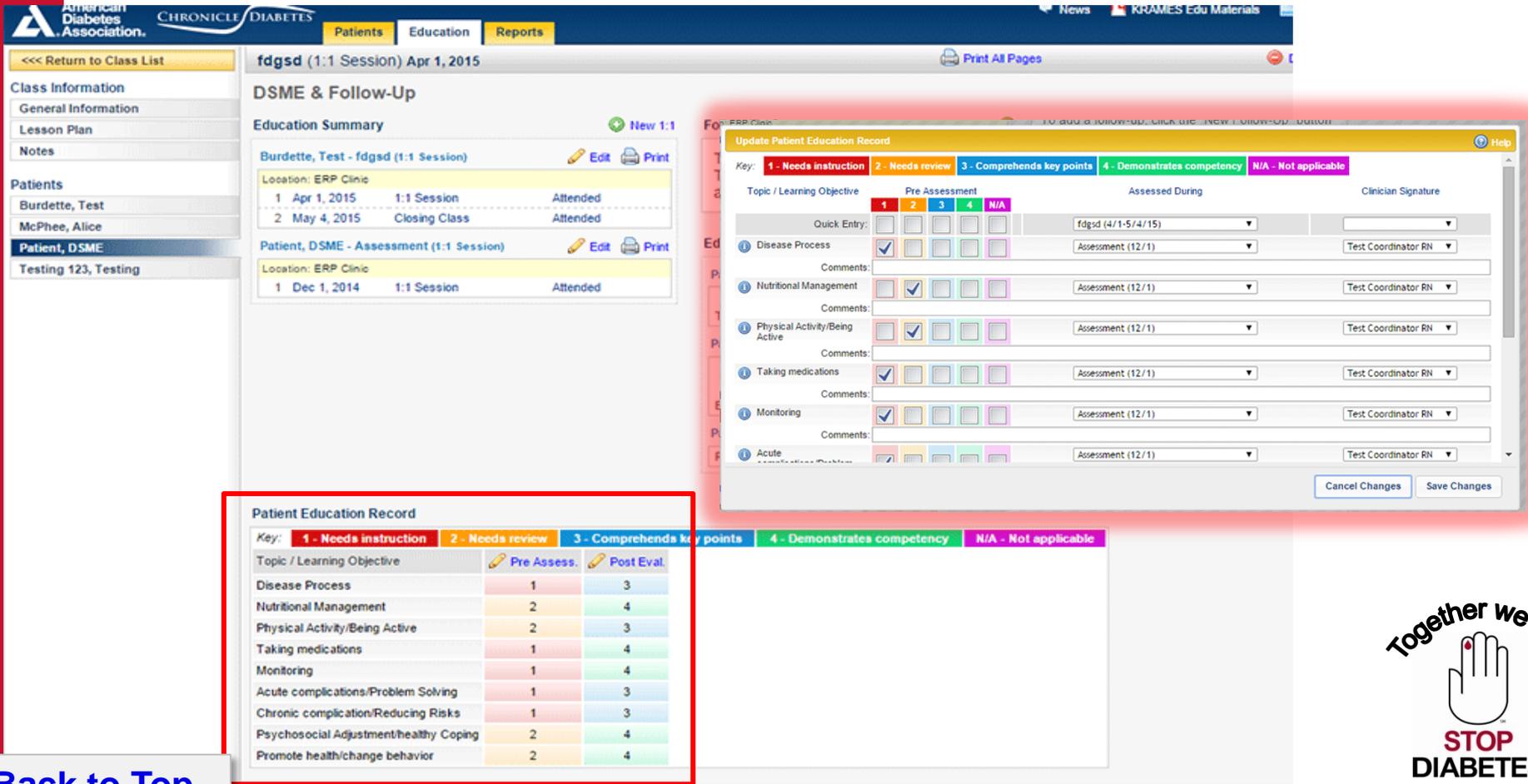
	Date	Session	Status
1	Mar 1, 2012	1:1 Session	Attended

Follow-Up Summary ➕ New Follow-Up

F/U Date	Method	Clinician	
✎ Jun 13, 2012	Phone	Elen Educator	⊖
✎ Aug 1, 2012	Phone	Elen Educator	⊖

Documenting Patient Education Page 8 of 9

Within the **education record** you are presented with a window which displays each of the nine topics and has two colored tables for *Pre Assessment* and a *Post Evaluation* scoring. For each of the nine areas that were taught, you can check a box in the *Pre Assessment* and *Post Evaluation* columns to indicate this patient's level before and after education.



Update Patient Education Record

Key: 1 - Needs instruction 2 - Needs review 3 - Comprehends key points 4 - Demonstrates competency N/A - Not applicable

Topic / Learning Objective	Pre Assessment					Assessed During	Clinician Signature
	1	2	3	4	N/A		
Quick Entry:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	fdgsd (4/1-5/4/15)	
① Disease Process	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							
① Nutritional Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							
① Physical Activity/Being Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							
① Taking medications	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							
① Monitoring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							
① Acute complications/Problem Solving	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
Comments:							

Cancel Changes Save Changes

Patient Education Record

Key: 1 - Needs instruction 2 - Needs review 3 - Comprehends key points 4 - Demonstrates competency N/A - Not applicable

Topic / Learning Objective	Pre Assess.	Post Eval.
Disease Process	1	3
Nutritional Management	2	4
Physical Activity/Being Active	2	3
Taking medications	1	4
Monitoring	1	4
Acute complications/Problem Solving	1	3
Chronic complication/Reducing Risks	1	3
Psychosocial Adjustment/healthy Coping	2	4
Promote health/change behavior	2	4

Documenting Patient Education *Page 9 of 9*

The **Education Plan**, **DSMS Plan** and **Barriers to Learning** are located under the Patient Education Record. Click on the New or Edit option next to the appropriate section to enter or update the information.

<<< Return to Class List
fdgsd (1:1 Session) Apr 1, 2015
Print All Pages

Class Information

General Information

Lesson Plan

Notes

Patients

Burdette, Test

McPhee, Alice

Patient, DSME

Testing 123, Testing

Date Completed: No value

Education Status Note: No value

Patient follow up success ✎ Edit

Patient Lost to Follow-Up: No

Patient Education Record

Key: 1 - Needs instruction 2 - Needs review 3 - Comprehends key points 4 - Demonstrates competency N/A - Not applicable

Topic / Learning Objective	Pre Assess	Post Eval
Disease Process	1	3
Nutritional Management	2	4
Physical Activity/Being Active	2	3
Taking medications	1	4
Monitoring	1	4
Acute complications/Problem Solving	1	3
Chronic complication/Reducing Risks	1	3
Psychosocial Adjustment/healthy Coping	2	4
Promote health/change behavior	2	4

Education Plan ➕ New Education Plan

There have not been any Education Plans documented for this patient. To add a new Education Plan, click the New Education Plan link above.

DSMS Plan ➕ New DSMS Plan

▼ Current DSMS Plan

Documented during: Assessment (12/1/14) ✎ Edit DSMS Plan ✖ Delete DSMS Plan

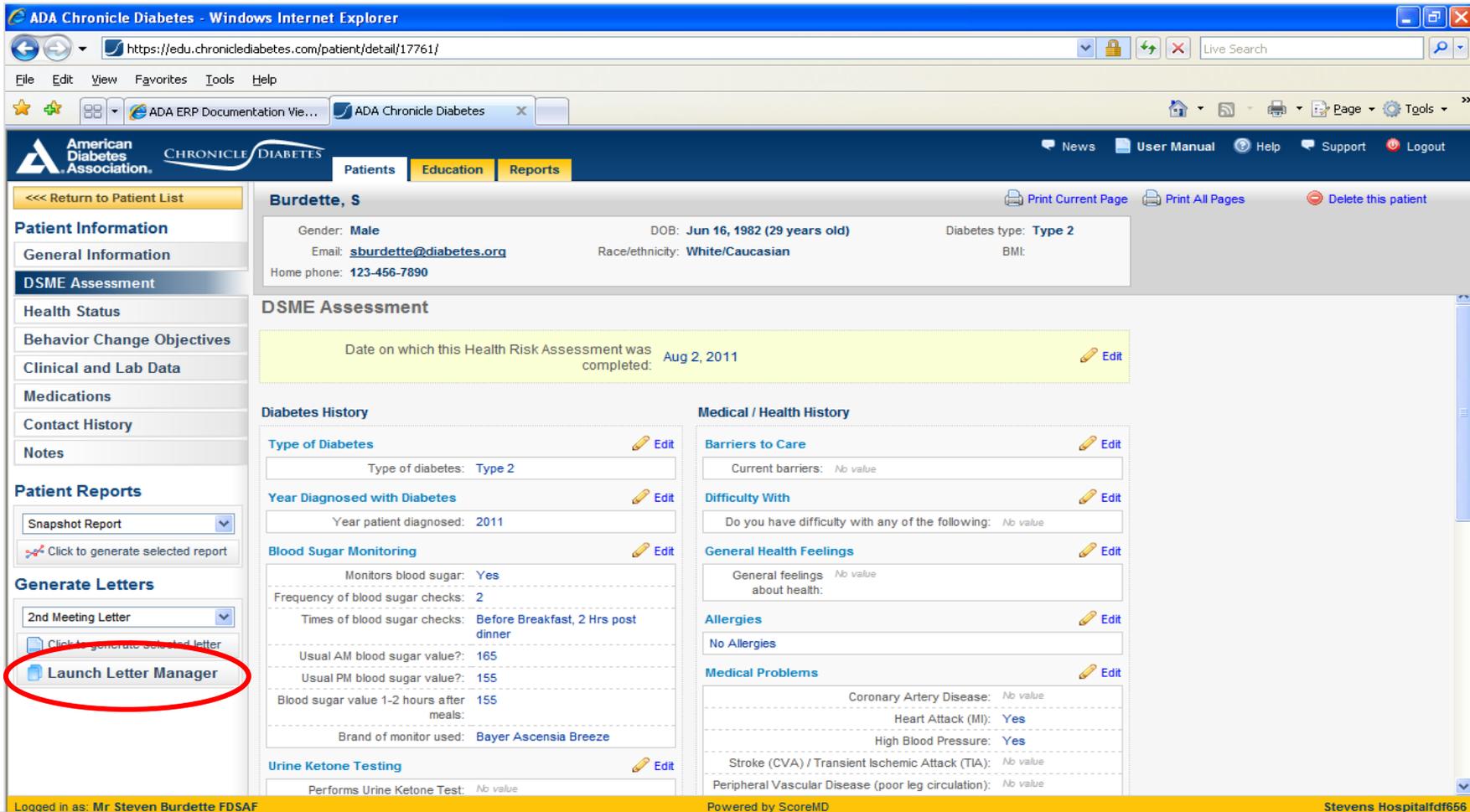
- Diabetes Forecast- 800-342-2383- www.diabetesforecast.org
- Diabetes Self-Management- 855-367-4813- www.diabetesseifmanagement.com

Identified Barriers to learning/adherence to self management plan ➕ New Entry

There have not been any identified Barriers to learning/adherence to self management plan documented for this patient. To add a new Entry, click the New Entry link above.

Module 3: Creating and Editing Letters with the Letter Manager *Page 1 of 5*

1. From any Letter Generation Wizard window, or from the **Launch Letter Manager** tab at the bottom left of a patient's record, you can use the Letter Manager to create and edit your letters in the system.



The screenshot displays the ADA Chronicle Diabetes patient record for Steven Burdette. The interface includes a navigation menu on the left with sections for Patient Information, DSME Assessment, Patient Reports, and Generate Letters. The 'Generate Letters' section contains a dropdown menu for letter types and a 'Launch Letter Manager' button, which is circled in red. The main content area shows patient details, a DSME Assessment summary, and various medical history sections such as Diabetes History, Blood Sugar Monitoring, and Medical Problems.

ADA Chronicle Diabetes - Windows Internet Explorer
https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association. CHRONICLE DIABETES Patients Education Reports

News User Manual Help Support Logout

<<< Return to Patient List

Burdette, S Print Current Page Print All Pages Delete this patient

Patient Information

Gender: Male DOB: Jun 16, 1982 (29 years old) Diabetes type: Type 2
Email: sburdette@diabetes.org Race/ethnicity: White/Caucasian BMI:
Home phone: 123-456-7890

DSME Assessment

Date on which this Health Risk Assessment was completed: Aug 2, 2011 Edit

Diabetes History

Type of Diabetes Edit
Type of diabetes: Type 2

Year Diagnosed with Diabetes Edit
Year patient diagnosed: 2011

Blood Sugar Monitoring Edit
Monitors blood sugar: Yes
Frequency of blood sugar checks: 2
Times of blood sugar checks: Before Breakfast, 2 Hrs post dinner
Usual AM blood sugar value?: 165
Usual PM blood sugar value?: 155
Blood sugar value 1-2 hours after meals: 155
Brand of monitor used: Bayer Ascensia Breeze

Urine Ketone Testing Edit
Performs Urine Ketone Test: No value

Medical / Health History

Barriers to Care Edit
Current barriers: No value

Difficulty With Edit
Do you have difficulty with any of the following: No value

General Health Feelings Edit
General feelings about health: No value

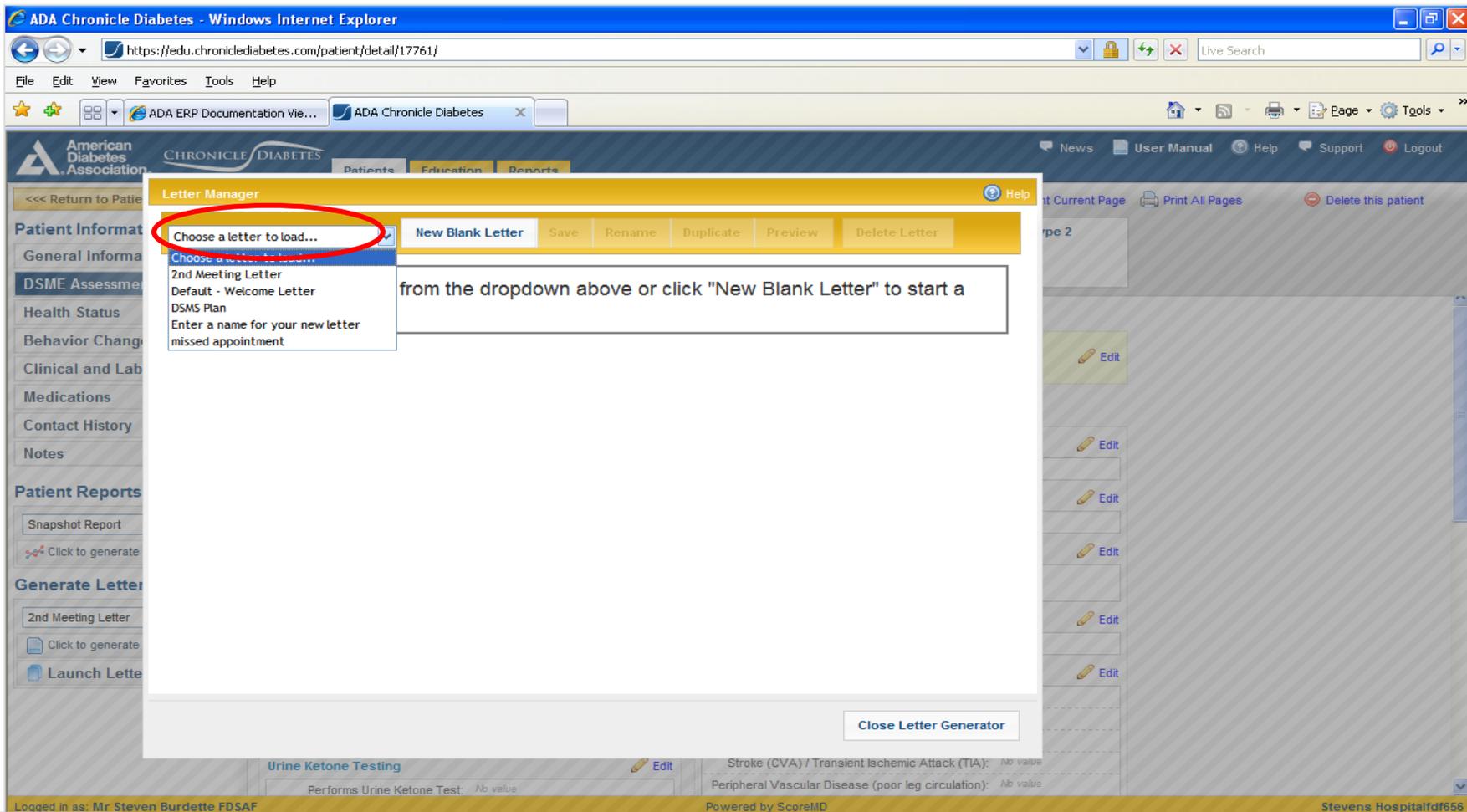
Allergies Edit
No Allergies

Medical Problems Edit
Coronary Artery Disease: No value
Heart Attack (MI): Yes
High Blood Pressure: Yes
Stroke (CVA) / Transient Ischemic Attack (TIA): No value
Peripheral Vascular Disease (poor leg circulation): No value

Generated as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf656

Creating and Editing Letters with the Letter Manager *Page 2 of 5*

2. To begin editing an existing letter, select the letter from the **Choose a letter to load** drop down list at the top of the wizard. That will load the letter template in the main text area. Alternatively, you can click New Blank Letter to start from scratch.



The screenshot shows the ADA Chronicle Diabetes Letter Manager interface. The 'Choose a letter to load...' dropdown menu is highlighted with a red circle. The menu options include '2nd Meeting Letter', 'Default - Welcome Letter', 'DSMS Plan', and 'Enter a name for your new letter missed appointment'. A text box explains that clicking 'New Blank Letter' starts a new letter.

from the dropdown above or click "New Blank Letter" to start a

Creating and Editing Letters with the Letter Manager *Page 3 of 5*

- 3) Edit the text of the letter using normal text editing steps (type, delete, etc.). To format text, select a section of text and use the **formatting bar** directly above the main letter area to change the style, justification and formatting.

The screenshot displays the ADA Chronicle Diabetes Letter Manager interface within a Windows Internet Explorer browser. The browser's address bar shows the URL <https://edu.chronicdiabetes.com/patient/detail/17761/>. The page title is "ADA Chronicle Diabetes - Windows Internet Explorer".

The main content area is titled "Letter Manager" and features a dropdown menu set to "Default - Welcome Letter". Below the dropdown is a "formatting bar" containing icons for bold (B), italic (I), underline (U), bulleted list, numbered list, left-align, center-align, right-align, and justify. This bar is circled in red. To the right of the icons is a "Insert Custom Tag" dropdown.

The letter text is as follows:

Dear «Patient Name»,

|

Thank you for scheduling your appointment at «Site Name». There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for «Upcoming Education Session Date» at «Upcoming Education Session Time».

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:
<https://patient.chronicdiabetes.com>
Username: «Patient Username»
Password: «Patient Password»

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

«Site Address Block»

At the bottom of the window, there is a "Close Letter Generator" button. The background shows a patient information sidebar and a patient history table with columns for "Urine Ketone Testing" and "Stroke (CVA) / Transient Ischemic Attack (TIA)".

Creating and Editing Letters with the Letter Manager *Page 4 of 5*

4) To insert a data field (e.g. current date, patient's name, etc.) that will be replaced when the letter template is merged with patient data, start by positioning the cursor where you would like the tag to go. Next click on the **Insert Custom Tag** menu and then select the tag you would like from the menu. This will insert a yellow tag into the letter, which will be replaced with the corresponding data when the actual letter is generated.

The screenshot shows the ADA Chronicle Diabetes Letter Manager interface. The 'New Blank Letter' button is circled in red. The letter content includes fields for patient name, site name, upcoming education session dates and times, patient username and password, and site address block.

ADA Chronicle Diabetes - Windows Internet Explorer
https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES

Patients Education Reports

<< Return to Patient

Letter Manager

Default - Welcome Letter New Blank Letter Save Rename Duplicate Preview Delete Letter

B I U Insert Custom Tag

Dear «Patient Name»,

Thank you for scheduling your appointment at «Site Name». There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for «Upcoming Education Session Date» at «Upcoming Education Session Time».

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:
https://patient.chronicdiabetes.com
Username: «Patient Username»
Password: «Patient Password»

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,
«Site Address Block»

Close Letter Generator

Urine Ketone Testing Performs Urine Ketone Test: No value

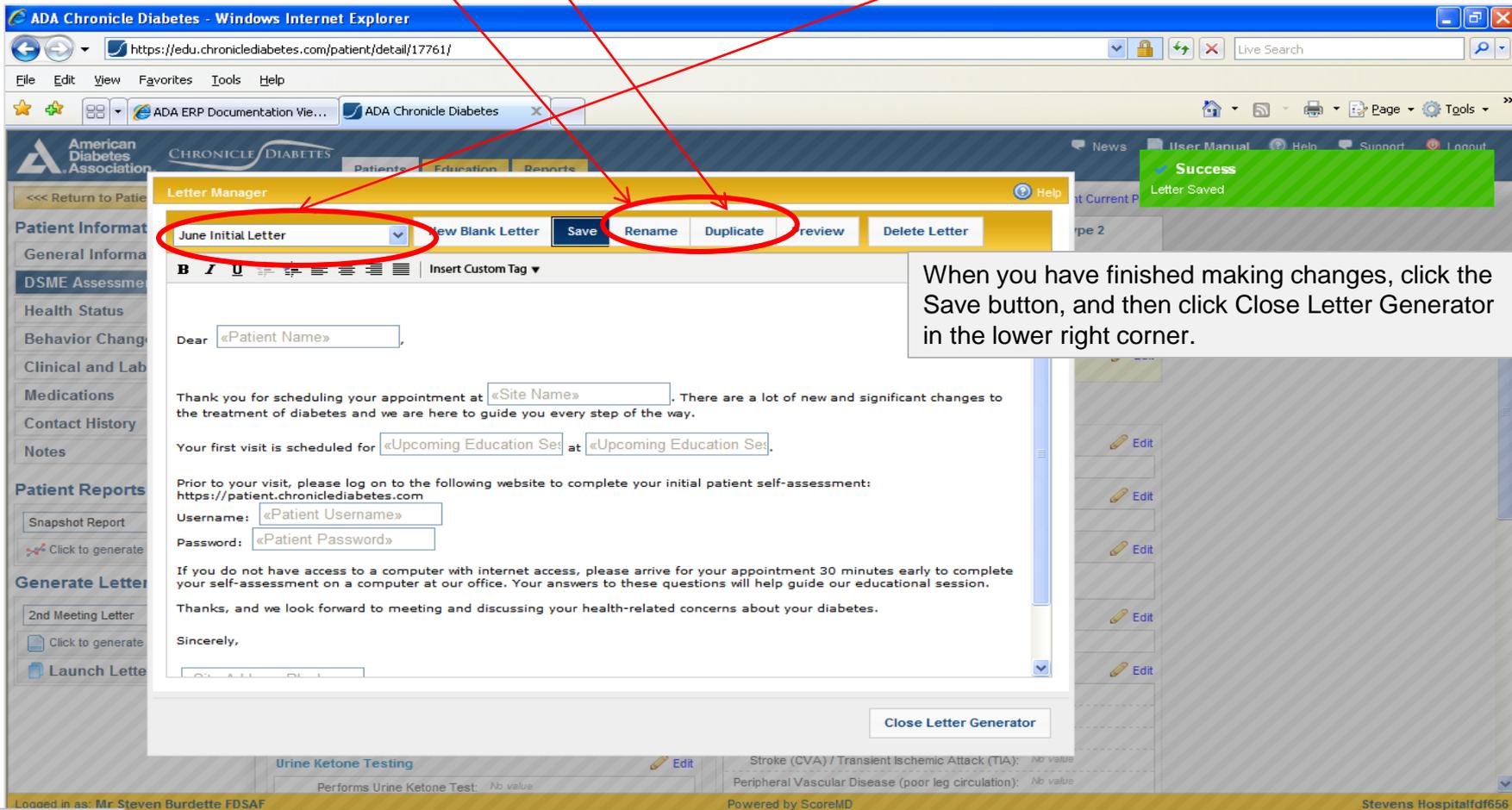
Stroke (CVA) / Transient Ischemic Attack (TIA): No value

Peripheral Vascular Disease (poor leg circulation): No value

Seven Burdette FDSAF Powered by ScoreMD Stevens Hospital/fdf656

Creating and Editing Letters with the Letter Manager *Page 5 of 5*

A letter can be renamed (e.g. change the name of the letter as it appears in the Select **Letter dropdown** menu) by clicking the **Rename** button. To create a new letter based on an existing letter, first select the existing letter and then click **Duplicate** and give the new letter a new name. Perform any edits to this new letter and save it when done. Clicking Preview will generate a downloadable version of the letter in the Microsoft Word format.



When you have finished making changes, click the Save button, and then click Close Letter Generator in the lower right corner.

Generating Individual Patient Letters Page 1 of 2

Once you are in the patient record:

- 1) Choose the letter you would like to send within the Generate Letters dropdown menu
- 2) Click the *Click to generate selected letter* button on the lower left menu.

The screenshot shows the American Diabetes Association patient record interface for a patient named Elle Telle. The interface includes a navigation menu on the left, a patient information header, and several data sections. The 'Generate Letters' dropdown menu is highlighted with a red box, showing options for 'Default - Welcome Letter' and a 'Click to generate selected letter' button. Other sections include 'General Information', 'Web Login', 'Contact Information', 'Referrals', and 'Health Insurance Information'.

Navigation Menu:

- <<< Return to Patient List
- Patient Information
 - General Information
 - DSME Assessment
 - Health Status
 - DSME & Follow-Up
 - Behavior Change Objectives
 - Clinical and Lab Data
 - Medications
 - Contact History
 - Notes
 - Documents
- Patient Reports
 - Snapshot Report
 - Options:
 - Notes
 - All Notes
 - Click to generate selected report
 - Generate Letters**
 - Default - Welcome Letter
 - Default - Welcome Letter
 - Click to generate selected letter
 - Launch Letter Manager

Patient Information: Telle, Elle (Print)

Gender: Male | DOB: Mar 13, 1997 (18 years old) | Diabetes type: Type 1
Email: | Race/ethnicity: Asian/Chinese/Japanese/Korean | BMI: N/A
Home phone: |

General Information:

Patient Name / ID: Elle Telle (Edit)
Patient ID: No value
Medicaid ID: No value
Status: Active
Chronicle ID (internal): 203144

Web Login: (Edit)
Username: elletelle203144 | Password: *****

Contact Information: (Edit)
Address 1: No value
Address 2: No value
City: No value
State: No value
Postal Code: No value
Email: No value
Work Phone: No value
Home Phone: No value
Cell Phone: No value

Demographics: (Edit)
Patient Type: No value (Edit)
Date of Birth: Mar 13, 1997 (18 yrs. old)
Gender: Male
Race: Asian/Chinese/Japanese/Korean
Occupation: No value
Preferred Language: English
Education: No value

Sites: (Edit)
ERP Clinic

Referrals: (Add Referral)
No referrals assigned.

Health Insurance Information: (Edit)
Has insurance: No value

Provider / Physician:

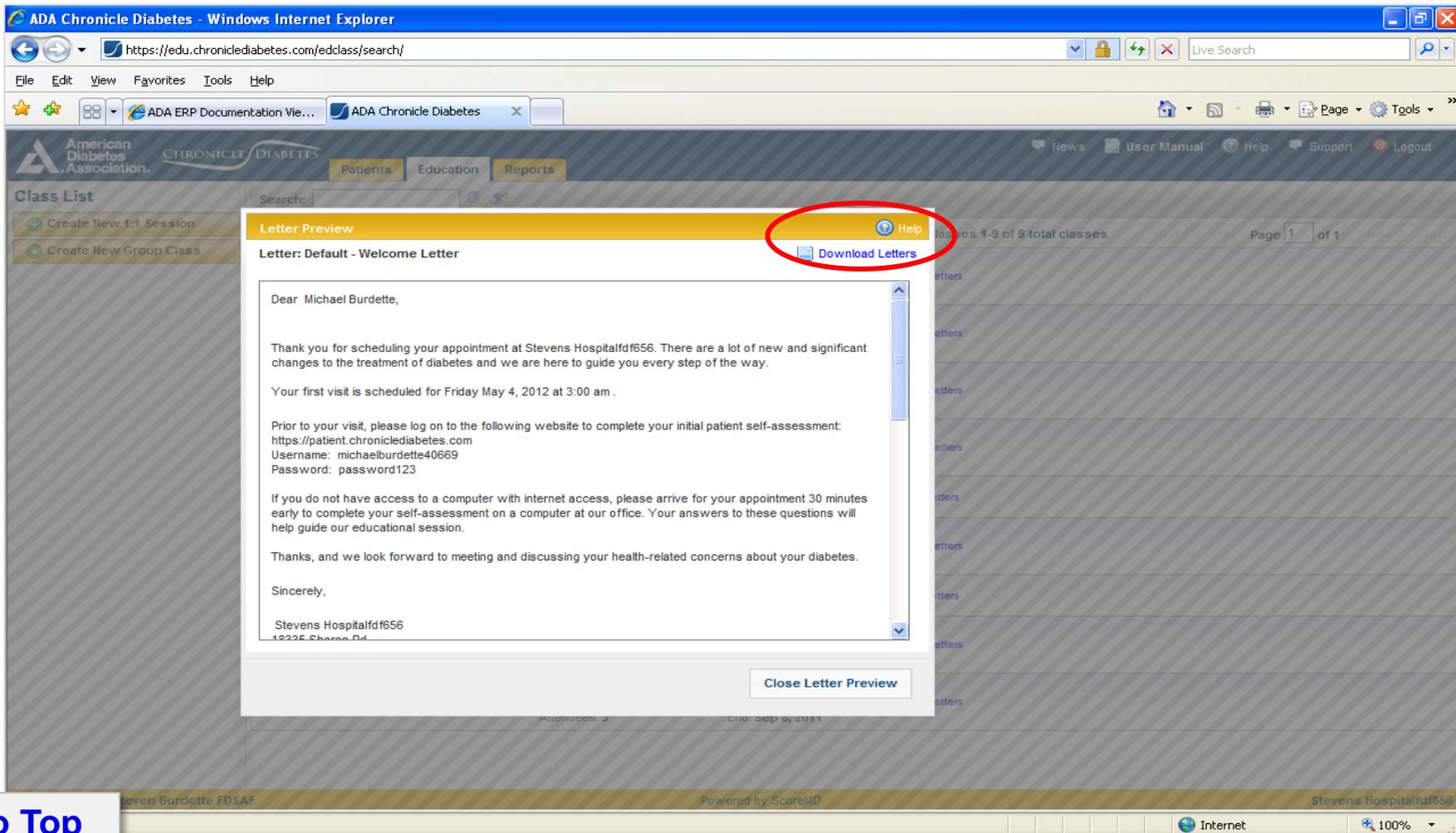
Primary Physician (PCP): No provider assigned. (Assign)
Physician Responsible for Diabetes Management: (Assign)

Cohorts: (Add/Remove from Cohorts) (Edit Cohorts)



Generating Individual Patient Letters *Page 2 of 2*

You will see a preview of the letter(s) that will be created. If this looks correct, click **Download Letters**, which will prompt you to download the resulting Microsoft Word file to your computer. Once the letters file is on your computer you can open it in Microsoft Word, edit it as necessary, and print the letter to send to the patients.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chronicdiabetes.com/edclass/search/". The page displays a "Letter Preview" modal window for a "Default - Welcome Letter". The letter content is as follows:

Dear Michael Burdette,

Thank you for scheduling your appointment at Stevens Hospitaldf656. There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for Friday May 4, 2012 at 3:00 am .

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:
https://patient.chronicdiabetes.com
Username: michaelburdette40669
Password: password123

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

Stevens Hospitaldf656
48226 Stevens Rd

The "Download Letters" button is circled in red. Other visible elements include a "Close Letter Preview" button, a "Help" icon, and a "Class List" sidebar on the left with options like "Create New 1:1 Session" and "Create New Group Class". The footer of the page includes "seven Burdette FDSA", "Powered by ScoreMD", and "Stevens Hospitaldf656".

Generating Letters to send to Class Participants *Page 1 of 4*

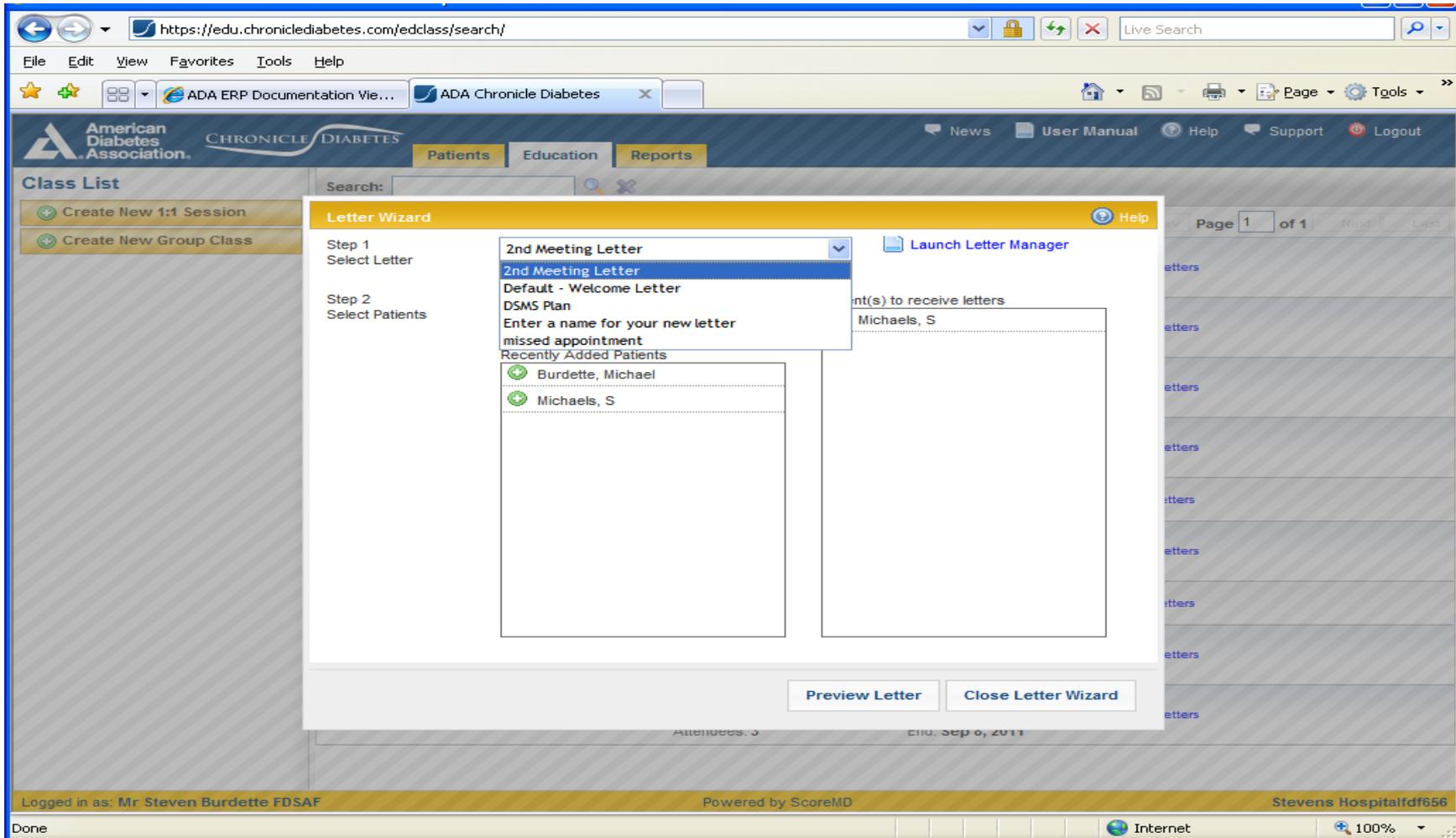
After the class has been set up you can create a welcome letter that can be sent (via U.S. mail) to each of the patients to give them initial information and invite them to complete their online initial patient self-assessment (PSA). Return to the main class list by clicking the Return to Class Listing button in the upper left. In the listing row for the class you created, click the **Generate Letters** link on the right side and follow the next 3 steps.

The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chronicdiabetes.com/edclass/search/". The page header includes the American Diabetes Association logo and navigation tabs for "Patients", "Education", and "Reports". The main content area is titled "Class List" and contains a table of classes. The first row is circled in red, highlighting the "Generate Letters" link. The table lists various classes with details such as format, sessions, attendees, and dates.

Showing classes 1-9 of 9 total classes			
fdasf	Format: Combination of 1:1 and Group Sessions: Not Scheduled Attendees: None Assigned	Start: End:	Generate Letters
2	Format: Classroom / Group Sessions: Not Scheduled Attendees: None Assigned	Start: End:	Generate Letters
June 2012	Format: Classroom / Group Sessions: 1 Attendees: 1	Start: Jun 1, 2012 End: Jun 1, 2012	Generate Letters
May 2012	Format: Combination of 1:1 and Group Sessions: 3 Attendees: 1	Start: May 4, 2012 End: May 31, 2012	Generate Letters
Ste, Steve - SSS	Format: 1:1	Date: Apr 11, 2012	Generate Letters
January 24 to February 28	Format: Combination of 1:1 and Group Sessions: 2 Attendees: 3	Start: Jan 24, 2012 End: Jan 25, 2012	Generate Letters
Ste, Steve - safsdaf	Format: 1:1	Date: Jan 12, 2012	Generate Letters
Stevens 1st EDU Class	Format: Combination of 1:1 and Group Sessions: 1 Attendees: 1	Start: Aug 2, 2011 End: Aug 2, 2011	Generate Letters
Steven's Test	Format: Classroom / Group Sessions: 4 Attendees: 3	Start: Jul 12, 2011 End: Sep 8, 2011	Generate Letters

Generating Letters to send to Class Participants *Page 2 of 4*

- 1) Select the letter you would like to create from the drop down list.



The screenshot displays a web browser window at the URL <https://edu.chronicdiabetes.com/edclass/search/>. The page features the American Diabetes Association logo and navigation tabs for Patients, Education, and Reports. A "Class List" section is visible on the left, with options to "Create New 1:1 Session" and "Create New Group Class".

The main content area is dominated by a "Letter Wizard" modal window. This window is divided into two steps:

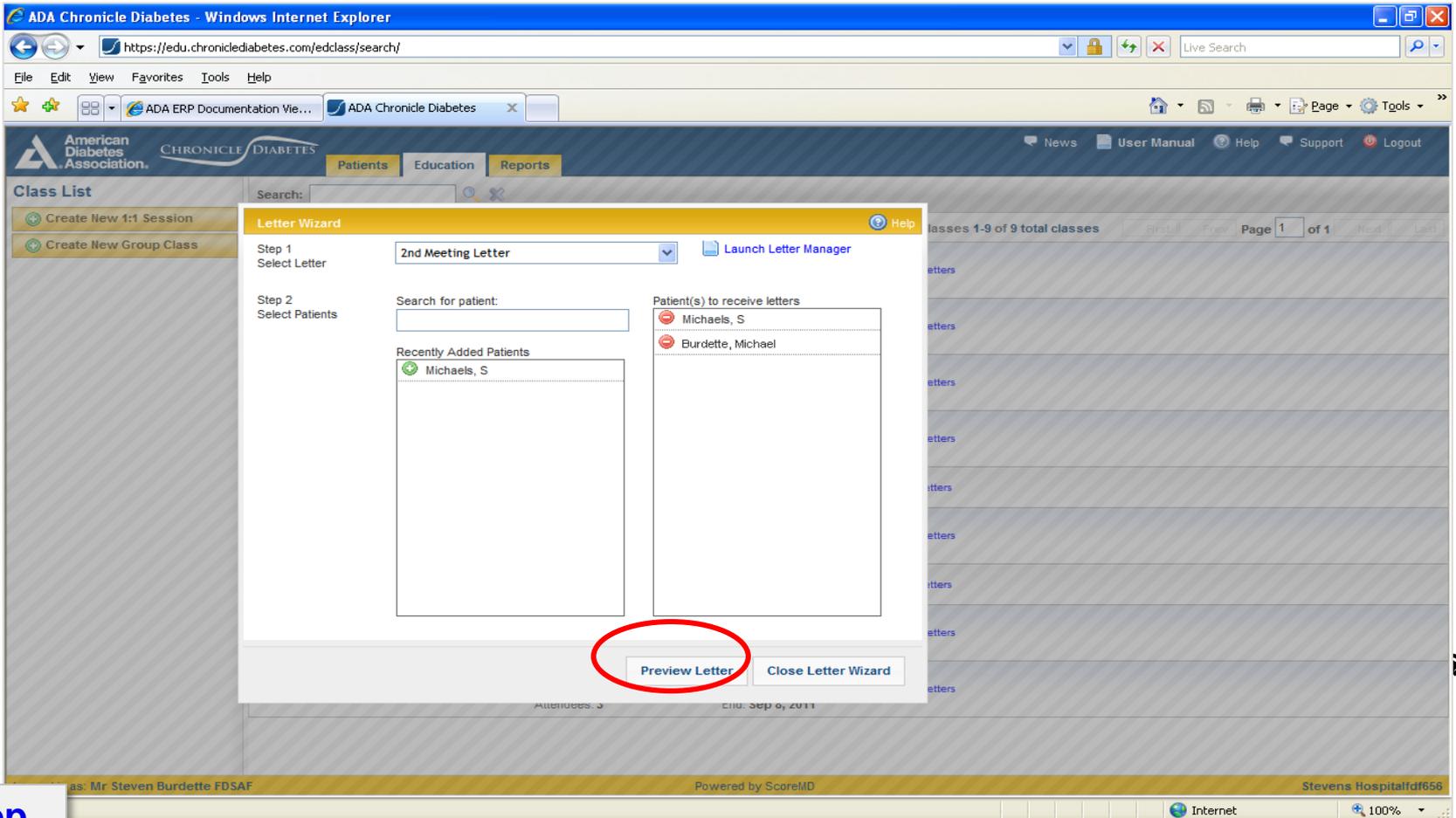
- Step 1: Select Letter**: A dropdown menu is open, showing the following options: "2nd Meeting Letter" (selected), "Default - Welcome Letter", and "DSMS Plan".
- Step 2: Select Patients**: A list of "Recently Added Patients" is shown, including "Burdette, Michael" and "Michaels, S".

Below the patient list, there is a text input field labeled "Patient(s) to receive letters" containing the text "Michaels, S". At the bottom of the wizard, there are two buttons: "Preview Letter" and "Close Letter Wizard".

The background page shows a "Class List" table with columns for "Attendees" and "End" date. The current page is "Page 1 of 1". The footer indicates the user is logged in as "Mr Steven Burdette FDSAF" and the system is "Powered by ScoreMD".

Generating Letters to send to Class Participants *Page 3 of 4*

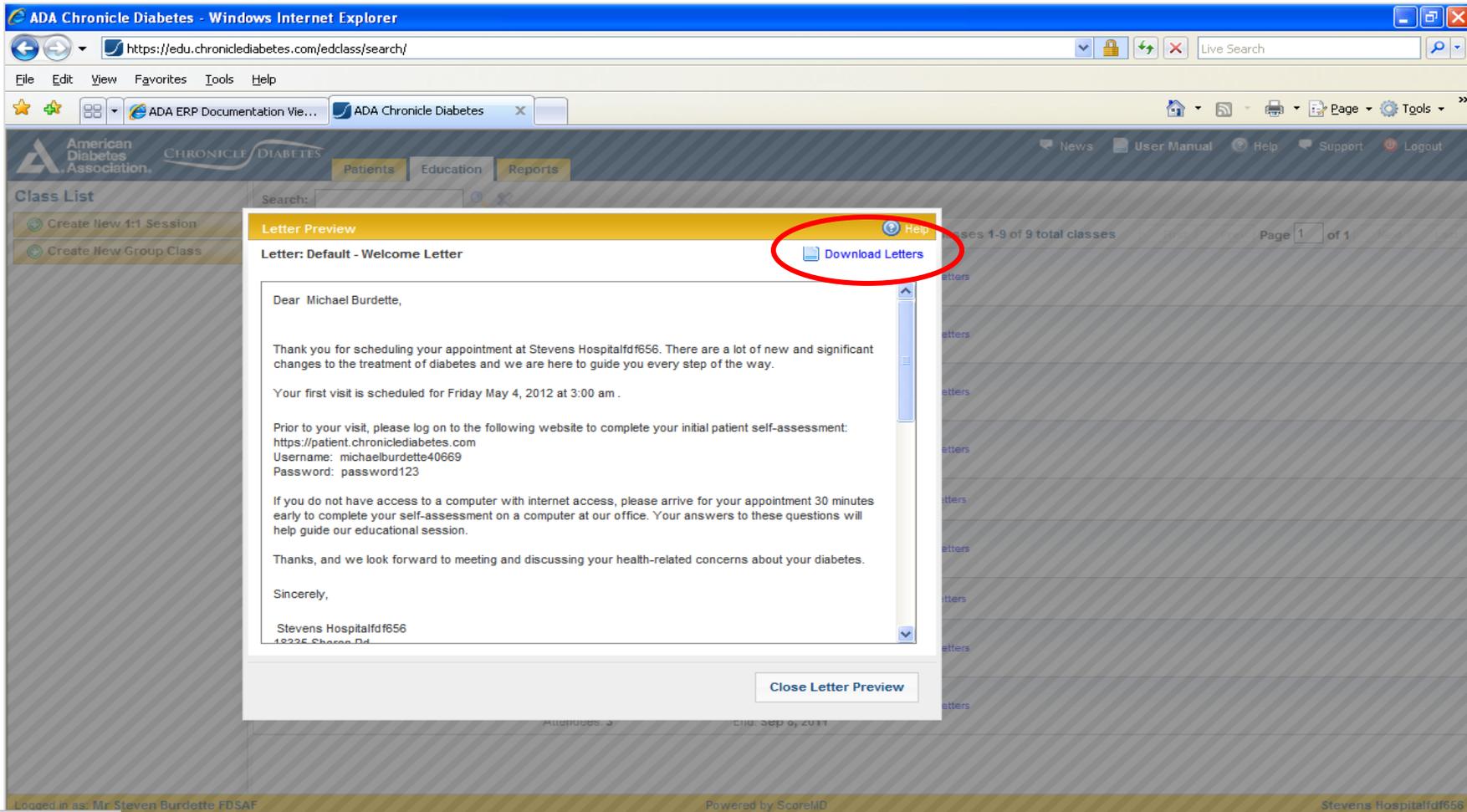
- 2) Select the patients you would like to receive the letter. By default, all of the patients in the class are selected. If there are any other patients that you would like include, click on the patient's name in the left column to add them to the right column (the recipients list). To remove someone from the recipients list, just click on her name in the right column. When the recipients list is correct; click on **Preview Letter**.



The screenshot displays the ADA Chronicle Diabetes web application interface. A 'Letter Wizard' dialog box is open, showing the process of selecting a letter and recipients. The 'Preview Letter' button at the bottom of the dialog is highlighted with a red circle. The background shows a 'Class List' table with a search bar and navigation controls.

Generating Letters to send to Class Participants *Page 4 of 4*

- 3) You will see a preview of the letter(s) that will be created. If this looks correct, click **Download Letters**, which will prompt you to download the resulting Microsoft Word file to your computer. Once the letters file is on your computer you can open it in Microsoft Word, edit it as necessary, and print the letter to send to the patients.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chronicdiabetes.com/edclass/search/". The browser's address bar and menu bar are visible. The website's navigation bar includes "Patients", "Education", and "Reports" tabs. A "Class List" section is visible on the left. A "Letter Preview" window is open, displaying a "Letter: Default - Welcome Letter". The letter text is as follows:

Dear Michael Burdette,

Thank you for scheduling your appointment at Stevens Hospitaldf656. There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for Friday May 4, 2012 at 3:00 am .

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:
https://patient.chronicdiabetes.com
Username: michaelburdette40669
Password: password123

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

Stevens Hospitaldf656
18226 Stevens Rd

The "Download Letters" button in the top right corner of the letter preview window is circled in red. A "Close Letter Preview" button is located at the bottom right of the preview window.

Letter Manager Tips

- The default welcome letter (already within Chronicle) provides you with the login details and web address for the online Patient Self-Assessment. (This can be sent via postal mail or copied and pasted into an email to send to the patient.)
- You have the ability to copy and past your own existing letters into the letter wizard and save them accordingly. .
- Organization Logos are not able to be uploaded into the Letter Wizard. You may add a logo once the letter has been exported to a Word document.

Chronicle Resources

- [Chronicle User Manual](#)
- [Recorded Chronicle Webinar](#)
- [Chronicle Reports Guide](#)
- [Demo version of Chronicle](#)
- [Required Data for an Annual Status Report](#)
- [Required Data for an Application](#)
- [Chronicle Diabetes Assessment Form](#)
- [Chronicle Diabetes Assessment Form](#) (Spanish)

For assistance with Chronicle Diabetes please contact ADA staff at ERP@diabetes.org or 888-232-0822.