

Standard 5 DSMES Chart Review Form 11th Edition	DSMES Cycle	Charts		
		Yes	No	Page this element is found on and notes
Provider referral if insurance requires one. Medicare requires a referral	A			
Participant assessment: on the 11 topics areas				
1. Clinical: Health history	B			
2. Cognitive: Functional health literacy and numeracy	B			
3. Ability to describe Diabetes Pathophysiology	B			
4. Ability to incorporate Healthy Eating into lifestyle	B			
5. Ability to incorporate Being Active into lifestyle	B			
6. Ability to Take Medications safely (if applicable)	B			
7. Ability to Monitor Glucose and other parameters, interpreting and using results	B			
8. Ability to prevent detect and treat Acute Complications	B			
9. Ability to prevent detect and treat Chronic Complications	B			
10. Ability adapt Lifestyle for Healthy Coping	B			
11. Ability to recognize Diabetes Distress and identify Support options.	B			
Education Plan based on participant concerns and assessed needs	C			
Summary of education intervention with date, content taught and instructor's name	D			
Education learning outcomes	E			
Participant selected behavioral goal set	F			
Participant selected behavioral goal follow up	G			
Clinical or Quality of Life outcome/s measured	H			
Documentation reflecting communication with referring provider or HCP outside of the DSMES service regarding education plan, or education provided and outcomes	I			

Audit ready Tip: Identify 5 completed DSMES charts per multisite at a minimum every 6 months or identify one chart every month.

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