

# Chronicle Pro Walkthrough

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# Element A - Referral if required by participants insurance

If referral is not required, then this section turns green.

If you Indicate Yes, you will need to enter:

- Referral Date
- Medicare Yes/No
- Add referring provider.
- **Upload referral** – This can be any Microsoft Office document

If the referral is readily available outside of Chronicle, then you can check the box and the upload is not required.

You can also indicate here if this is a self-referral, and the referral is not required.

The screenshot displays the 'CHRONICLE DIABETES' interface for patient 'Adams, Abraham'. The 'DSMES REFERRAL INFORMATION' section is active, showing 'Referral Required by Insurance' as 'Yes'. A 'Create New Referral' modal is open, containing the following fields and options:

- Referral date:** A text input field.
- Medicare Patient:** A dropdown menu.
- File to Upload:** A 'Choose File' button and 'No file chosen' text.
- ☐ Check here if the referral is readily available outside of Chronicle Diabetes
- Referring Provider (if not a self-referral):** A dropdown menu currently showing 'No provider assigned.' with a 'Select' button.
- ☐ Check here if this is a self-referral
- Reason for referral:** A text area.
- Buttons:** 'Cancel Changes' and 'Save Changes' at the bottom.

On the right side of the interface, the 'PROVIDER / PHYSICIAN' section lists 'Mr Mitchell Doctorson Head Guy' as the 'Primary Physician (PCP)' with contact information. Below this, the 'Physician Responsible for Diabetes Management' is listed as 'No provider assigned.'

# Element B – DSMES Assessment

- All sections of the DSMES Assessment and Health Status sections need to be documented for this section to turn green.
- You will notice two new sections we have added – Emergency Preparedness and Dental and Eye Exam questions.
- Be sure that after the assessment has been completed that you sign the assessment form and date it.

**American Diabetes Association. CHRONICLE DIABETES**

**Patients** | Calendar | Education | Reports

Adams, Abraham | Gender: Male | Race: Native Hawaii... | Age: 32 years | DT: Type 2 | BMI: N/A | A1c: 6.1%

**DSMES ASSESSMENT** | Edit DSMES Assessment

**PROVIDER SIGNATURE AND REVIEW DATE**

Date completed: Oct 4, 2023 | Clinician Signature: Bob2 Rossland

**Diabetes History**

**TYPE OF DIABETES**  
Type 2

**YEAR DIAGNOSED WITH DIABETES**  
1999

**BLOOD SUGAR MONITORING**

Monitors blood sugar: Yes

Frequency of blood sugar checks: no value

Times of blood sugar checks: no value

Usual AM blood sugar value?: no value

Usual PM blood sugar value?: no value

Blood sugar value 1-2 hours after meals: no value

Brand of monitor used: no value

Model of monitor used: no value

**URINE KETONE TESTING**

**Medical / Health History**

**BARRIERS TO CARE**  
Current barriers: Food / Caregiver / Support Network

**DIFFICULTY WITH**  
Do you have difficulty with any of the following: no value

**GENERAL HEALTH FEELINGS**  
General feelings about health: Good

**PAIN**  
Has Chronic Pain: No  
Where: no value  
How long: no value  
Any treatment: no value  
Treatment Description: no value  
Rating of pain (1 being slight and 10 being severe): no value

**ALLERGIES**  
No Allergies

**Patient Reports**

Snapshot Report | All Notes | Generate selected report

**Generate Letters**

Default - Welcome Letter | Generate selected letter | Launch Letter Manager





# Elements C, D and E - Development of Education Plan, Education Intervention and Learning Outcomes (2 of 5)

## Group or 1:1 Education – Lesson Plan

- Any topics/learning objectives that score below a 3 in the (next page) **pre-assessment** will need to be documented as instructed under the lesson plan of the 1:1 or group education class.

The lesson plan can be found under the education tab or through the participant record

The screenshot shows the 'Update Class Lesson Plan' dialog box in the American Diabetes Association's CHRONICLE DIABETES system. The dialog is titled 'Update Class Lesson Plan' and has a 'Help' icon. It contains a table with the following columns: 'Topic / Learning Objective', 'Quick Entry', and 'Dates of Instruction'. The 'Dates of Instruction' column shows 'Aug 1, 2023 8:00 AM'. The 'Quick Entry' column has checkboxes for each topic, all of which are checked. The 'Dates of Instruction' column has dropdown menus for each topic, all of which are set to 'Bob2 Rossland'. The topics listed are:

- Diabetes disease process and Treatment options
- Incorporating nutritional management into lifestyle
- Incorporating physical activity into lifestyle
- Using medications safely
- Monitoring blood glucose, interpreting and using results
- Prevention, detection and treatment of acute complications
- Prevention, detection and treatment of chronic complications
- Developing strategies to address psychosocial issues
- Developing strategies to promote health/change behavior

At the bottom of the dialog, there are 'Cancel Changes' and 'Save Changes' buttons. Red arrows point from the text on the left to the 'Lesson Plan' tab in the background and to the 'Update Class Lesson Plan' dialog box.

# Elements C, D and E - Development of Education Plan, Education Intervention and Learning Outcomes (3 of 5)

## Pre-Assessment

- Based upon educator's initial assessment of patient's knowledge, you will need to document the Pre-Assessment
- All topics that score under a 3 will need to be documented as taught in the 1:1 or group class (previous slide).

Adams, Abraham | Gender: Male | Race: Native Hawaiian... | Age: 32 years | DT: Type 2 | BMI: N/A | A1c: 6.1%

Location: ABC DSME Center | Education Complete: Yes

**Update Patient Education Record** [Help]

Topic / Learning Objective	Pre Assessment	Assessed During	Clinician Signature
Quick Entry: 1 2 3 4 N/A   Apply to all...   Apply to all...			
Disease Process	1	Initial Assessment (8/1)	Marge Simpson
Nutritional Management	2	Initial Assessment (8/1)	Marge Simpson
Physical Activity/Being Active	2	Initial Assessment (8/1)	Marge Simpson
Taking medications	3	Initial Assessment (8/1)	Marge Simpson
Monitoring	3	Initial Assessment (8/1)	Marge Simpson
Acute complications/Problem Solving	3	Initial Assessment (8/1)	Marge Simpson
Chronic complication/Reducing Risks	2	Initial Assessment (8/1)	Marge Simpson
Psychosocial Adjustment/healthy Coping	2	Initial Assessment (8/1)	Marge Simpson
Promote health/change behavior	3	Initial Assessment (8/1)	Marge Simpson

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

Cancel Changes | Save Changes

Key: 1 Needs instruction | 2 Needs review | 3 Comprehends key points | 4 Demonstrates competency | N/A Not applicable | NV No Value

**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.

Powered by ScoreMD - 172.18.37.54 - Mon Oct 9 2023 19:35:57 UTC | Flinside Media

New Education Plan

**American Diabetes Association**



# Elements C, D and E - Development of Education Plan, Education Intervention and Learning Outcomes (4 of 5)

## Post Evaluation

- Any topics that are under a 3 within the pre-assessment will need the post evaluation score documented in the post evaluation section and will need a score. N/A will not be accepted.

Patients | Calendar | Education | Reports

Adams, Abraham | Gender: Male | Race: Native Hawaii... | Age: 32 years | DT: Type 2 | BMI: N/A | A1c: 6.1%

This patient does not have any follow-ups assigned. To add a follow-up, click the New Follow-up link above. Patient follow up success

### Update Patient Education Record

Topic / Learning Objective	Post Evaluation	Assessed During	Clinician Signature
PATIENT EDUCATION RECORD			
Quick Entry:	1 2 3 4 N/A	Apply to all...	Apply to all...
① Disease Process	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Nutritional Management	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Physical Activity/Being Active	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Taking medications	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Monitoring	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Acute complications/Problem Solving	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Chronic complication/Reducing Risks	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Psychosocial Adjustment/healthy Coping	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer
① Promote health/change behavior	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Initial Assessment (8/1)	J Brad Ummer

Key: 1 Needs instruction 2 Needs review 3 Comprehends key points 4 Demonstrates competency N/A Not applicable No Value

Cancel Changes Save Changes

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



# Elements C, D and E - Development of Education Plan, Education Intervention and Learning Outcomes (5 of 5)

## Education Completion Status

- Education will need to be documented as complete along with the date to turn this section green.

**DSMES & FOLLOW-UP** C,D,E Print Page

**EDUCATION SUMMARY** New 1:1

Adams, Abraham - Initial Assessment (1:1 Session) Edit Print

Location: ABC DSME Center

1	Aug 1, 2023	1:1 Session	Attended	

Adams, Abraham - August (1:1 Session) Edit Print

Location: ABC DSME Center

**FOLLOW-UP SUMMARY** New Follow-Up

This patient does not have any follow-ups assigned. To add a follow-up, click the "New Follow-Up" button above to add.

**PATIENT EDUCATION RECORD**

Topic / Learning Objective	Pre Assess.
Disease Process	2
Nutritional Management	1
Physical Activity/Being Active	1
Taking medications	3

**EDUCATION STATUS**

Patient's total educated hours

Total:	0 hours 30 minutes
Total (last 12 months):	0 hours 30 minutes

Patient completed education program Edit

Education Complete: Yes

Date Completed: Sep 5, 2023

Education Status Note: no value

Patient follow up success

Patient Lost to Follow-Up:

**Patient Status** Help

☒ Education Complete No

Date Completed 09/05/2023

Education Status Note

Cancel Changes Save Changes

# Elements F, G – Behavioral Goal/s Set & Behavioral Goals Follow Up

## Behavioral Goal(s)

- A **baseline** and **follow-up** on at least one behavioral goal are required to meet the F & G elements of the DSMES cycle.

**Behavior Change Objectives**

Established/Updated	Objective	Achievement	Status	Barriers Addressed
Oct 2, 2023	Overeat less often	75% (Most of the time)	Continued	No
Sep 1, 2017	Overeat less often	0% (None of the time)	Baseline	Yes

**Plan:**  
Not buy chips

**Outcome:**  
Eat chips < 3 a week

**Followup Method:** In person

**Plan:**  
Not buy chips

**Outcome:**  
Eat chips < 3 a week

**Generate selected report**

**American Diabetes Association**



# Element H – Measurement of Participant Outcomes

## Clinical or Quality of Life Outcome(s)

- A **baseline** and **follow-up** are required to meet element H of the DSMES cycle.

The screenshot displays a software interface for tracking participant outcomes. On the left is a sidebar menu with various categories, including 'Clinical and Lab Data' which is highlighted. The main area is titled 'CLINICAL AND LAB DATA' and contains a table of test results. Two red arrows originate from the text 'baseline' and 'follow-up' in the bullet point above, pointing to the first and second HbA1c entries in the table, respectively.

**CLINICAL AND LAB DATA**

A baseline and follow-up on at least one lab value are required to meet element H of the DSMES cycle.

TEST RESULTS Add test...

	Date	Result
>	Height: 72.00 inches	
✓	HbA1c: 6.1 %	
✓	Oct 1, 2023	6.1 %
	Source:	Lab/physician reported, Entered by educator
✓	Feb 1, 2023	9.0 %
	Source:	Patient reported, Entered by patient

> Lipid Profile: Total: 1, HDL: 5, LDL: 3, Trig: 10 mg/dl

**Patient Reports**

- Snapshot Report
- All Notes

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# Element I – Communication to Provider

- Date of communication, method of communication and result of communication are required. If other is chosen, then Other (details) are required.
- If you are not able to upload the communication to the provider, click on the check box to indicate that communication is readily available outside of Chronicle.

Return to Patient List Adams, Abraham Gender: Male Race: Native Hawaii... Age: 32 years DT: Type 2 BMI: N/A A1c: 6.1%

General Information DSMES Referral Information DSMES Assessment Health Status DSMES & Follow-Up Behavior Change Objectives Clinical and Lab Data Medications Contact History Notes Patient Documents Communication to Provider

COMMUNICATION TO PROVIDER

COMMUNICATIONS TO PROVIDER

Date Submitted Patient Provider Communication Help

Select the most appropriate method of communication to classify this contact. Give the communication a description. Select the document from your computer. Note the acceptable file types are PDF (.pdf) or Microsoft Office (.doc, .docx, .xls, .xlsx, .ppt, .pptx). The maximum file size is 2MB.

Date of Provider Communication: 10/01/2023

Method of Communication: Patient progress has been routed or CI

Other (details):

Result of Communication: Emailed/Faxed

Notes Regarding Provider Communication: Communication has been routed to the provider through the EMR.

Provider: No provider assigned. Select

File to Upload: Choose File No file chosen

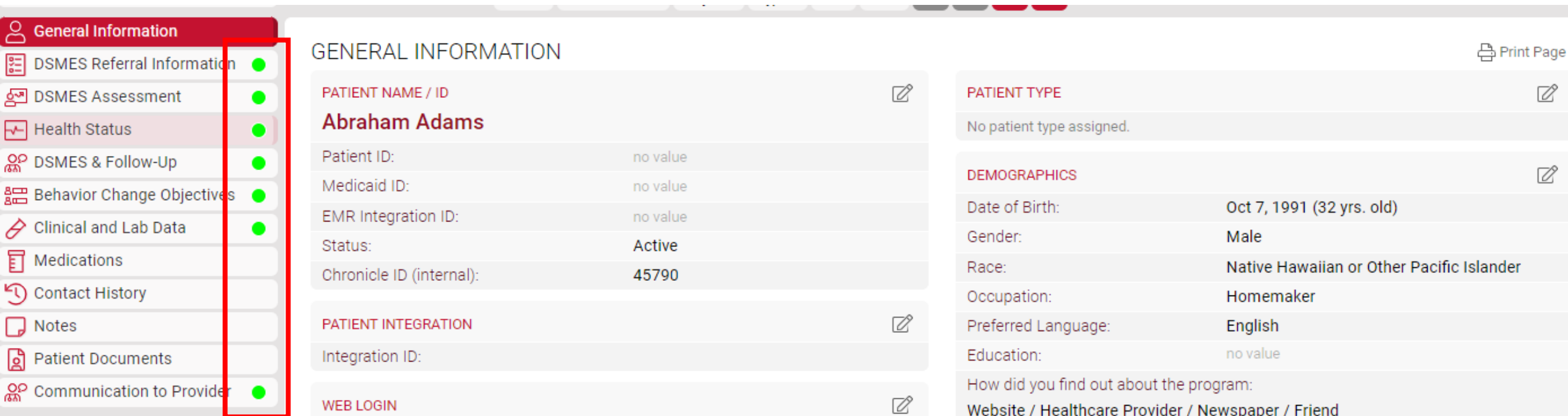
☒ Check here if the communication to the provider is readily available outside of Chronicle Diabetes

Cancel Changes Save Changes



# A-I DSMES Cycle Status

The A-I cycle is considered complete when the 7 sections that previously had red lights are now all green.



**General Information**

- DSMES Referral Information
- DSMES Assessment
- Health Status
- DSMES & Follow-Up
- Behavior Change Objectives
- Clinical and Lab Data
- Medications
- Contact History
- Notes
- Patient Documents
- Communication to Provider

**GENERAL INFORMATION**

**PATIENT NAME / ID**

**Abraham Adams**

Patient ID: no value

Medicaid ID: no value

EMR Integration ID: no value

Status: Active

Chronicle ID (internal): 45790

**PATIENT TYPE**

No patient type assigned.

**DEMOGRAPHICS**

Date of Birth: Oct 7, 1991 (32 yrs. old)

Gender: Male

Race: Native Hawaiian or Other Pacific Islander

Occupation: Homemaker

Preferred Language: English

Education: no value

How did you find out about the program:

Website / Healthcare Provider / Newspaper / Friend

**PATIENT INTEGRATION**

Integration ID:

**WEB LOGIN**

# Additional Functions – Chart Audit Report

Within each patient chart you have the option to print an **identified** OR **de-identified** chart audit report. Each letter of the A-I cycle is highlighted on the report.

American Diabetes Association CHRONICLE DIABETES

Patients Calendar Education Reports

Return to Patient List

Adams, Abraham Gender: Male Race: Native Hawaiian... Age: 32 years DT: Type 2 BMI: N/A A1c: 6.1%

General Information

DSMES Referral Information

DSMES Assessment

Health Status

DSMES & Follow-Up

Behavior Change Objectives

Clinical and Lab Data

GENERAL INFORMATION

PATIENT NAME / ID

Abraham Adams

Patient ID: no value

Medicaid ID: no value

EMR Integration ID: no value

PATIENT TYPE

No patient type assigned.

DEMOGRAPHICS

Date of Birth: Oct 7, 1991 (32 yrs. old)

Gender: Male

**Please Note:** The system currently does not automatically download the report as a PDF. When you select print you can choose either print to PDF or Save as PDF depending on the version of Microsoft Office you are using.



# Additional Functions – Patient Search by DSMES Cycle Status and Encounter Date and View Missing Documentation

You can now search patient records by the DSMES Cycle Status (complete or not complete) and by the encounter date.

- DSMES Cycle Status
- Encounter Date
- **Missing** – This section indicates which elements of the DSMES cycle have not been documented within the chart.

Patients

Calendar

Education

Reports

News

Bob2 Rossland

ABC DSME Center

Search patients...

DSMES cycle status:  
DSMES Cycle Status...

Patient Status:  
Patient Status...

Limit Results by Cohort:  
Limit results by cohort...

Start Date:  
mm/dd/yyyy

End Date:  
mm/dd/yyyy

Encounter/Lab

DSMES or Follow up

NAME	GENDER/RACE	DOB	TYPE	VISITS	ACTIONS	MISSING
● Adams, Abraham	Male Hawaiian/Pacific Islander	Oct 7, 1991 Age: 32	Type 2	Last: Aug 1, 2023		A,B,C,D,E,I
● Anderson, Alexander	Male American India/Alaskan	May 17, 1992 Age: 31	Type 2	Last: Jul 1, 2012		B,C,D,E,F,G,H,I
● August, April	Female Hawaiian/Pacific Islander	Jun 11, 2018 Age: 5	Type 2			B,F,G,I
● Bachota, Alyssa A S.	Female Other	Sep 12, 1945 Age: 78	Type 2	Last: Feb 18, 2022		A,B,C,D,E,F,G,H,I
● Bailey, Amanda	Female White/Caucasian	Aug 30, 1987 Age: 36	Type 2	Last: May 16, 2012		A,B,C,D,E,F,G,H,I
● Bainbridge, Amber Sara	Female Hawaiian/Pacific Islander	Aug 24, 1990 Age: 33	Type 2	Last: Apr 15, 2013		A,B,C,D,E,F,G,H,I
● Barkley, Andre	Male American India/Alaskan	Nov 3, 1950 Age: 72	Type 2			A,B,C,D,E,F,G,H,I

# Additional Functions – Calendar Feature

- The new calendar function will allow users to see upcoming classes, sessions, and scheduled follow-ups by month, week or day.
- By clicking on the session and/or follow-up you can jump right to the session.

## CALENDAR

today < >

October 2023

month week day

SUN	MON	TUE	WED	THU	FRI	SAT
1 ● 8a September Session 1	2	3	4	5	6	7
8	9	10	11	12	13 ● 8a September Session 3	14
15	16	17	18	19	20	21
22	23	24	25	26	27 ● 8a September Session 2	28



# Subscription Information

## **Current Chronicle Users** *(Services that have been using Chronicle prior to October 16, 2023):*

Your service will be able to utilize Chronicle Pro free for 90 days starting October 16<sup>th</sup>. After 90 days the Chronicle Pro features will be disabled, and your service can either subscribe to Chronicle Pro or continue to use the current standard version of Chronicle. There will be an email communication to the Quality Coordinators 30 days prior to the 90-day mark with instructions on how to subscribe to Chronicle Pro.

## **New Chronicle Users** *(Users that have “turned on” Chronicle after October 16, 2023):*

Your service will be able to utilize Chronicle Pro free for 90 days after Chronicle is “turned on” within the Chronicle tab of the ERP Portal. After 90 days the Chronicle Pro features will be disabled, and your service can either subscribe to Chronicle Pro or continue to use the current standard version of Chronicle. There will be an email communication to the Quality Coordinator 30 days prior to the 90-day mark with instructions on how to subscribe to Chronicle Pro.

## **Chronicle Pro Subscription Fees:**

- 1 Year \$150.00
- 4 Year \$400.00 (\$200 savings)

**Please Note:** The current version of Chronicle Diabetes will remain free and no data that already exists within the platform will change during or after the Chronicle Pro trial period.

Please email [ERP@diabetes.org](mailto:ERP@diabetes.org) if you have any questions.

# Chronicle Q/A Call Registration and Webinar

**Chronicle Pro Webinar:** [https://zoom.us/rec/share/b9GYm1q4g\\_YOd-As2\\_hVSUnmrdIWpWT2XWdKk4-Lq21TW1bq2WGbWD-lrp\\_7soK9.nKVBtmo4iFmedZ2p?startTime=1696521486000](https://zoom.us/rec/share/b9GYm1q4g_YOd-As2_hVSUnmrdIWpWT2XWdKk4-Lq21TW1bq2WGbWD-lrp_7soK9.nKVBtmo4iFmedZ2p?startTime=1696521486000)

- Passcode: 861430

Sign up for the next live Chronicle Q/A Webinar at <https://diabetes.org/erpqa>

Please email [ERP@diabetes.org](mailto:ERP@diabetes.org) if you have any questions.