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| **Standard 5**  **DSMES Chart Review Form**  **11th Edition**  **Form Key: (Y=Present) and (N= Not present)** | **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 12 topics areas** | | | | |
| 1. Clinical: Health history | **B** |  |  |  |
| 1. Cognitive: Functional health literacy and numeracy | **B** |  |  |  |
| 1. Diabetes Distress and Support Systems | **B** |  |  |  |
| 1. Ability to describe **Diabetes Pathophysiology** | **B** |  |  |  |
| 1. Ability to incorporate **Healthy Eating** into lifestyle | **B** |  |  |  |
| 1. Ability to incorporate **Being Active** into lifestyle | **B** |  |  |  |
| 1. Ability to **Take Medications** safely (if applicable) | **B** |  |  |  |
| 1. Ability to **Monitor Glucose** and other parameters, interpreting and using results | **B** |  |  |  |
| 1. Ability to prevent detect and treat **Acute Complications** | **B** |  |  |  |
| 1. Ability to prevent detect and treat **Chronic Complications** | **B** |  |  |  |
| 1. Ability adapt **Lifestyle** for **Healthy Coping** | **B** |  |  |  |
| 1. Ability to recognized **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. 11th Edition – revised 02/2022