

Std. #	DSMES Chart Review Form 10 th Edition Form Key: (Y=Present) and (N= Not present)	DSMES Cycle	Charts				
			1	2	3	4	5
7	Provider referral if insurance requires one. Medicare requires a referral.	A					
	Participant assessment:						
	• Clinical: Health history	B					
	• Cognitive: Functional health literacy and numeracy	B					
	• Diabetes Distress and Support Systems	B					
	Assessment of the 9 Topic Areas						
	▪ Ability to describe the Diabetes Disease Process and treatment options.	B					
	▪ Ability to incorporate Nutritional management into lifestyle	B					
	▪ Ability to incorporate Physical Activity into lifestyle	B					
	▪ Ability to use Medications safely (if applicable)	B					
	▪ Ability to Monitor blood glucose and other parameters; interpreting and using results	B					
	▪ Ability to prevent, detect and treat Acute Complications .	B					
	▪ Ability to prevent detect and treat Chronic Complications	B					
	▪ Ability to develop personalize strategies to address Psychosocial Issues and concerns - Examples: Psychosocial and Self Care Behaviors: Emotional Response to Diabetes, Cultural Influences, Health Beliefs, Health Behavior, Lifestyle Practices, Barriers to Learning, Relevant	B					
	▪ Ability to develop personalize strategies to Promote Health and Behavioral Change Example: goal setting, behavioral change strategies aimed at risk reduction such as preconception care, readiness to change	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						
9 Participant selected behavioral goal follow up	G						
8 Participant selected Diabetes Self-Management Support (DSMS) plan selected. A list of current options provided for review.	H						
9 Other participant outcome/s measured	I						
9 Documentation reflecting communication with referring provider or HCP outside of the DSMES service regarding education plan, or education provided and outcomes	J						

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

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