American Diabetes Association
Education Recognition Program - Chronicle
Getting Started - An instruction guide for program coordinators

Chronicle Walkthrough

These instructions represent a typical flow through Chronicle. There is much greater detail provided in the Chronicle User Manual. Also, please note that every page of Chronicle has a *Help* link at the top right of the page, and every pop up window has a *Help* link at the top. Clicking any of these *Help* links will display useful information and instructions relevant to the task that you are working on. Be sure to consult these *Help* links if you are unsure about some feature of the system.

Overview

A new patient has been referred to you for education. You manually contact this patient (e.g. by phone), determine a time for her education, and set up the patient in an upcoming class in Chronicle. You then generate a welcome letter confirming the DSME session and requesting she complete an initial patient self-assessment (PSA). After the patient completes the PSA you review the information. After the education class you document the class as well as patient specific goals, clinical data, and medications.

Setting up the new patient

- Click on the *Patients* tab at the top of the page. If you do not see a full list of patients that means you are viewing specific patient's record. Click the *Return to Patient List* button in the upper left to view all of your patients.
- Click on the *Patients* tab at the top of the page, and then the C*reate New Patient* button.
- Fill in as much information as you have. Fields marked with a red dotted line under the field are required. Click *Save Patient*.
- This will add the patient to your site and will open the patient's record. You will be on the *General Information* page of the patient's record.

Viewing other patients

- 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.
- 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.)
- For each page of the record, be sure to visit the *Help* link at the top right of the page for more detailed information.

Setting up a class

- To add this person to a class, first 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.
- To begin creating a new class, click *Create New Group Class* on the left side of the page to bring up the window.
- Enter a name for the class. Examples could be "June 2011" or "June 2011 Friday AM". Choose a name that you will logically associate with this class. Enter the *Class Type* and *Education Format* and click *Save Changes*.
- Begin by adding the general class information by clicking the *Edit* pencil link above the *Class Information* box. Enter the *Location*, *Language*, instruction methods and any materials you are using, and then click *Save Changes*.

- 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". You do not need to include the date in the name since the system will automatically display the session dates. Enter the other required information and click *Save Changes*. Repeat this process for each of the session that will comprise the class.
- 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*.
- Click the *Lesson Plan* tab on the left site of the page to view the class's educational lesson plan. Click the *Edit Lesson Plan* link. 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.)
- At this point the class is set up.

Creating Welcome letters for class patients

- 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.
- For Step 1, select the letter you would like to create from the drop down list.
- For Step 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*.
- 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 you 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.

Creating and editing letter with the Letter Manager

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

Documenting a class (after education has occurred)

- After you have conducted the DSME class you can document it by opening the class record. First click on the *Education* tab on the top of the page to see a list of all existing classes. Click on the class that you would like to document.
- On the *General Information* page of the record, the *Class Roster and Attendance* table lists each patients' attendance. Each colored column represents a specific class session as listed in the *Class Schedule* section. By default all patients are marked as being in attendance (ATT) at each session.
- To update the attendance, 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*.
- To document the time each educator spent with the patients, click Update *Educator Time*. Check the box next to each educator that participated in this class. Enter the minutes that each educator spent with each of the class sessions. Repeat for each of the educators. Click *Save Changes* when complete. Note this *Educator Time* section of the class record is optional and is not used to calculate time for future ERP Application submissions. All ERP Application submission data is calculated from the lengths defined for each of the sessions listed under the Class Schedule.
- Under the Navigation menu on the left side, under the *Patients* heading, click on the disclosure triangle (▶) beside the first patient's name to expand the list (▼), and then on the *Education* heading just below their name. Each of the topics that were defined in the class's *Lesson Plan* will be active on this *Education* form. Click on the *Edit Education* link. For each topic area, check the appropriate *Pre Assessment* and *Post Evaluation* value, and enter any comments. Then click *Save Changes*.
- Click on *Edit Identified Barriers* and *Edit Support Plan* and enter the information.
- Note the information on the *Follow Up* tab (under the patient's name) is entered when follow up is performed (e.g. three or six months post DSME), so that can be left blank at this time.
- Follow this process of documenting the education pre and post assessments, barrier and support plan for each patient in the class. You can add any additional information in the *Class Notes* section.
- At this point the class documentation is complete.