

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

Chronicle Diabetes is now available. Chronicle is a web-based system that provides tools for diabetes educators to document, track, and report on their patients' education process. This document is designed to set up your program for you and other educators to use Chronicle as your education documentation tool perform other functions like patient scheduling and running reports. First, you will be able to confirm all of your site information (both multi-sites and expansion sites), enter each of your educators (and other staff) and give everyone access to Chronicle to document patient education. From then on, day to day administration of your Chronicle sites will be done by the educators and staff members.

This document assumes that you have already followed the instructions for getting your program set up within the new ADA ERP portal. Those steps included:

1. Registering your program with the ERP portal
2. Initially confirming your program information in the ERP portal
3. Setting up your educators and staff
4. Starting, completing, submitting, and reviewing Applications and ASRs

If you have not already done those things, please do those first. Ensure that you follow Step 3 above since you will need to have configured all of the sites that are a part of your program (each of which can be used in Chronicle), and also each of the staff members (educators, office staff, etc.) that will be active at each site. Once you have gotten your program set up within the new ADA ERP portal, you can follow the instructions below.

Note: Properly assigning staff to sites is very important in order to ensure the correct collection of patient data in Chronicle. Once you have assigned a staff member to her sites, she is able to switch between the sites and enter patient and class information into the correct site. **IMPORTANT:** If the educator is seeing patients at multiple sites, each patient needs to be entered into the correct site. All patients should not be entered into the same site.

Setting up your educators and staff at Chronicle sites

Each of your staff members can be assigned to one or more of the sites. To designate which site(s), click on the *Staff Information* link in the left navigation bar. The *Staff Information* page lists all of the staff active at any of the sites within your program. Since each of the sites listed in the ERP portal corresponds to a Chronicle site, this is how you will manage staff assignments within Chronicle. When a staff member is assigned to a site, that means that the staff member has full access to the site's information within Chronicle, including being able to add patients at the site, view all patient records, create and document classes, etc. Because of this, it is important that you only assign staff members to appropriate sites. Also, if a staff member is no longer working at a site, you need to un-assign them from the site to prevent them from having access to the site and patient data.

Begin by clicking the *Show Details* link. At the bottom of the staff member's information box, under the *Site* header, is listed all of the sites that the member is assigned to. If the member is not yet assigned to any sites, or needs to be assigned to an additional site, click the *Assign Staff Member to Site* link next to the green plus circle. Select the appropriate site from the drop down list. If you want the staff member to be able to log into Chronicle and access this site, check the box that says

Grant Staff Member access to Chronicle / Diabetes on this site. Normally you'll want to check this box. An example when you *wouldn't* want to check this box is if this staff member is a guest educator at this site. In such a case you can still assign her to the site, so that her name will be listed as one of the people providing education at the site. But because you didn't check the *Grant access* box, she won't actually be able to log in. Note that you can always change any of this information later. Click *Save Changes* and you will see the site listed for the staff member. You will need to repeat this process if this staff member should be assigned to multiple sites. If you ever need help with any section of the portal, click the *Help* link in the upper right corner of the page, or the *Help* link within any popup window.

Managing your staff's access to their Chronicle sites

Once you've set up an educator, assigned her to a site, and granted her access to Chronicle, you can provide her with her credentials (username and password) that she will need to log in. Note that while you as the program coordinator will use your email address as your username when you log in, the staff members have usernames that are generated by the system. Thus the staff members will not use their email addresses when logging in. When you created each staff member, Chronicle automatically created a username and password, where the password is initially the same as the username. For example, if the username is JaneSmith12 then the password will also be JaneSmith12. The first time the staff member logs in they will be required to change the password to something known only by them. You can find out a staff member's username by clicking the *Show Details* link to the right of her name and looking under the *Login* section. Then tell the staff member that she can use that username and matching password to log into their Chronicle site by going here (which she can bookmark), for example:

<https://edu.chroniclediabetes.com/>

Username: JaneSmith12

Password: JaneSmith12

Again, the password that the staff member uses to log in for the first time will match the username exactly. If a staff member ever forgets her password, you don't need to contact ADA support. Instead, there is a link on the Chronicle login page that she can click to have a password reset link emailed to her. If for some reason this doesn't work (for example if her email address recently changed), you can manually reset the password. First, click the *Show Details* link, and then click the *Update* to the left of the *Login* box. Check the *Reset Password* box and click *Save Changes*. You can then tell the educator that her username has been reset to be the same as her password. The next time she logs in it will prompt her to again change the password known only to her.

IMPORTANT: If you have assigned a staff member to more than one site, when she's logged in she will only see the information (patients, classes, etc.) for one of those sites at a time. The name of the site that she's actively viewing is shown in the lower right corner of the window. To see information for a different site that she is also assigned to, she must switch to viewing that site. To do this, click on the name of the current site in the lower right corner of the window, which will bring up a box displaying the names of all the sites that she is assigned to. Click on the name of the site that she would like to view. This will switch her to that site. It is important that the staff member is viewing the correct site before she adds patients or classes. Patients and classes are always added to the site that she is currently viewing. If the staff member does not enter patients and classes into the correct site, the data collected for ERP Annual Status Reports and Renewals will not be correct.