

Sample Documentation Tools
MDCH DPCP DSMT Certification Program

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In the past, a set of sample documentation tools was available to MDCH certified programs and this set is an updated version. The set includes the following:
Self-Assessment Adults; Self-Assessment Gestational; Education Plan and Record;
Follow-up Plan and Assessment – Adults; Follow-up Plan and Assessment – Gestational.

The tools were designed for DSMT programs who provide primarily group education-only sessions (as opposed to on-going case management) - typically in outpatient hospital settings. They were developed in accordance with the 10 National Standards for Diabetes Self-Management Education and the additional requirements of ADA Recognition and State certification. The tools should be adapted so that they are appropriate for any unique characteristics of your program or your target population (e.g. low or very-low literacy or cultural aspects). There is no guarantee that implementation of any of the forms “as is” will satisfy all requirements of either accreditation body. Additionally, changes in specific requirements may affect the appropriateness of the tools.

The following is some specific information related to the individual tools:

Self-Assessment: Assessment is an on-going process and, although the participant questionnaire provides a significant amount of assessment data, it is not the only source. If assessment information is obtained and documented in one area, it need not be duplicated in another area. Other assessment data sources include: Referral information obtained from provider; initial screening information obtained as part of the registration process; information obtained during educational sessions; feedback from follow-up process. Specific assessment data obtained may vary depending on the outcome measure/s that are part of your CQI process. A policy for your assessment process will help prevent duplication while ensuring that all required components are implemented and documented.

Note: The end of the assessment form includes an area for instructional staff to document plans for addressing identified barriers to education if needed. Documentation of the education plan as it relates to the 10 content areas occurs on the separate form titled “Education Plan and Record” form.

Education Plan and Record: The first column identifies specific content areas that are part of the training plan and also verifies that the need for training in all these areas was assessed (as indicated by either a “check-mark” or an “NA”). If the box is “checked” there should be an intervention date/s documented and a date for which the

learning objectives were verified to be achieved (“met”), or an explanation in the comment area regarding why the plan was not implemented. The second column identifies the content area and a reference to the specific learning objectives that are part of the curriculum (these will vary from program to program and may be referenced “1, 2, 3 etc.” instead of “a, b, c etc”). If one or more of the specific learning objectives is not to be included in the training plan, it should be crossed out. The back of this tool provides examples of specific learning objectives for each content area for reference by instructional staff. These were selected randomly from ADA’s “Life With Diabetes” and **should not be duplicated** – it was included **for example only**.

Follow-up Plan and Assessment: The follow-up plan includes “discharge” recommendations and an area for the participant-developed, individualized behavior change goal.

The follow-up assessment includes an area for feedback about achievement of behavior change goal as well as feedback in other areas that have relevance to the quality of the program’s training and the need for additional interventions. Specific information obtained as part of the follow-up process may vary depending on the outcome measure/s that are currently part of the program’s CQI process.

If additional training interventions are provided (i.e. review of specific content areas), these must be documented and using the education record will streamline this documentation.