

## Welcome

### *DiaMed – Getting Started*

Thank you for choosing DiaMed! DiaMed is the premier diabetes education management software for diabetes educators and education programs. DiaMed has the capability to capture and store all of the necessary patient information, encounters, outcomes, and notes required for ADA Education Recognition, for the maintenance of comprehensive patient medical records, and for the effective management of a diabetes self-management training (DSMT) program.

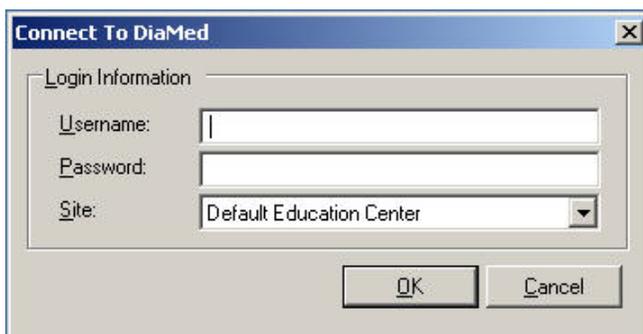
### System Requirements

To run DiaMed, your system must meet these minimum specifications:

- Windows 2000 or Windows XP
- Pentium 4 processor
- 256 MB RAM
- 10 MB hard-disk client; 50 MB hard-disk server
- Access to high speed internet (System Administrator only)

### *Logging in to DiaMed for the First Time*

When connecting to DiaMed for the first time, you will use the username *admin* and the password *admin*. After log in, you will see the *Change Password* window prompting you to create a unique password for the Admin user.

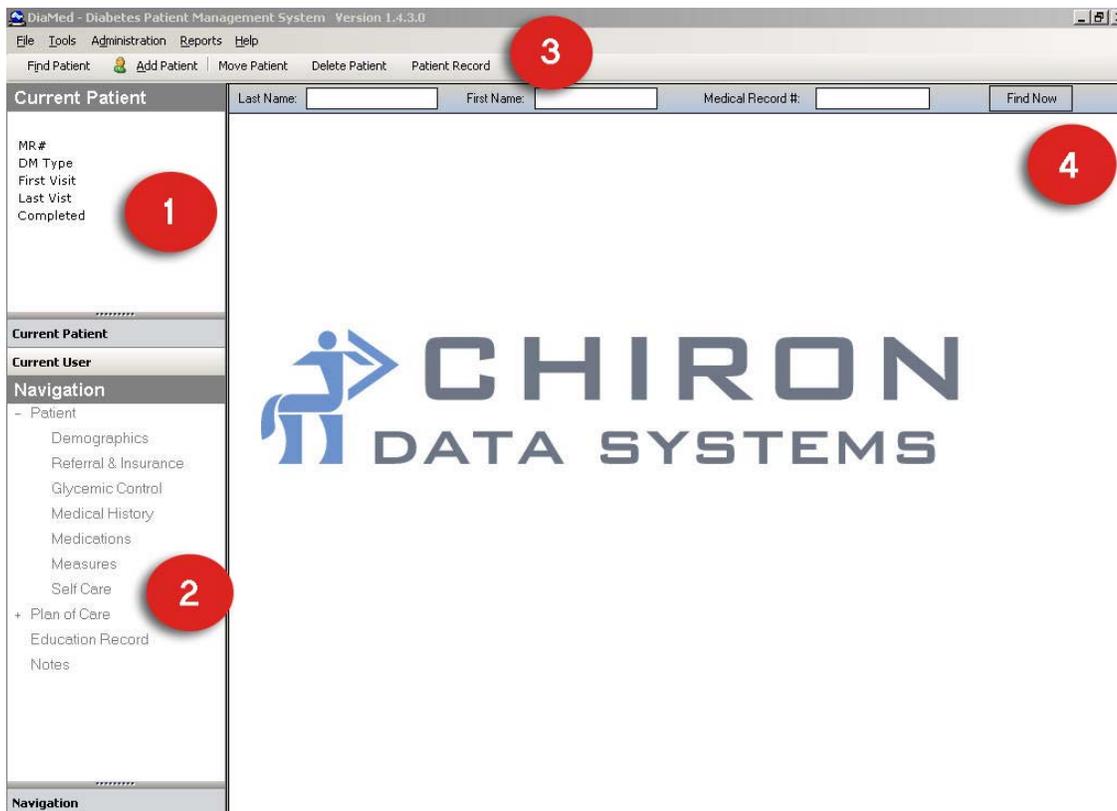


Note: if DiaMed was installed by a third party (for example, your IS representative), you may need to contact them to get the *admin* password if they logged into DiaMed following install and changed the *admin* password.



Make a note of the Admin password. In the event that you get locked out of DiaMed, you can reset your user password by logging in as Admin and following the steps noted in [Resetting a User Password](#).

## Becoming Familiar with the Welcome Screen



### **Current Patient**

When a patient record is open, the following information displays in the *Navigation Bar* (far left side of the screen) for quick reference:

- Patient Name
- Medical Record Number (*MR#*)
- Diabetes Type (*DM Type*)
- Date of Initial Visit (*First Visit*)
- Date of Most Recent Visit (*Last Visit*)
- Program Completion Date (*Completed*) or notation of Failure to Complete (*Failed*)
- Primary Language (*Primary Language*)
- Referring Provider (*Referred by*)
- Education Center (*Education Center*)

If applicable, additional pertinent information will also display. This includes:

- Medication Management Referral (*Referred for Med. Management*)
- Estimated Due Date (*Due Date*)

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## **Current User**

Clicking on *Current User* in the *Navigation Bar* will open the Current User view. The Current User view displays the current date, health care system, user name, education center/site, and the user's assigned role.

## **Navigation**

Once a patient record is opened, you can easily maneuver through it using the *Navigation Bar* on the lower left hand side of the screen. By clicking on the name of the desired section of the patient record, DiaMed will immediately take you to the selected section, thereby eliminating the need to "scroll" through the record.

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## **Toolbar and Menu Bar**

The *Menu Bar* is the horizontal bar below the title bar that contains the names of menus. A menu displays a list of commands. The DiaMed menus include:

- File
- Tools
- Administration
- Reports
- Help

The DiaMed *Toolbar* (located under the *Menu Bar*) contains buttons which, when clicked, execute a command. A few of these buttons have images next to them so you can quickly associate the command with the image. The buttons include:

- Find Patient
- Add Patient
- Move Patient\*,\*\*
- Delete Patient\*,\*\*
- Patient Snapshot\*
- Patient Record\*
- Generate Letter\*

\* These buttons are only visible when you are logged in to a patient record.

\*\* These buttons are only available to the System and Center Administrators.



## **Search Toolbar**

The *Search Toolbar* allows you to enter patient information in a variety of formats to quickly and easily locate a patient record. To activate the *Search Toolbar*, hit *Find Now*. To search for a patient record, you can enter any of the following search criteria and then hit *Find Now* to return a filtered list of patient(s):

- Full name, including last name and first name
- Last name only
- First name only
- Medical record number only
- Last name, first name, and medical record number

Additionally, to simplify the search process, you can enter just the first (few) character(s) of the last name, first name, and/or medical record number and generate a list of patients that match the criteria. For example, if you know the patient's first name starts with an "S", you can enter "S" into the *First Name* text box and hit *Find Now* and DiaMed will return a list of all patients whose first names beginning with "S".

Once DiaMed has generated a list of patients based on your search criteria, you can sort the records by ascending and descending order. By default, all lists are in alphabetical order by last name. By clicking on *Patient Name*, however, you can sort all names in reverse alphabetical order. This same method of sorting can be used with any of the columns on the search screen, including:

- Patient Name
- Medical Record Number
- Preferred Contact
- Initial Visit Date
- Last Visit Date
- Birthday

Once you have located the desired patient record, double click or highlight and hit *Enter* on your keyboard to open the comprehensive patient record.

## Setting up Your DSMT Program in DiaMed

As the System Administrator, you will need to set up your Health Care System (or sponsoring organization), Education Center(s), and user accounts before you or your colleagues can enter patient data into DiaMed. *Please note: the terms “education center” and “site” are used interchangeably throughout DiaMed and the DiaMed user manual.*



All DSMT program information (including Health Care System, Education Center, and User Properties) is as defined by the American Diabetes Association’s Application for Education Recognition<sup>1</sup> and is utilized in a variety of reports and printouts.

To make the set-up process as efficient as possible, make sure that you have all of the necessary information easily accessible before beginning (you can use this form as a checklist):

### Health Care System:

#### General (Tab 1)

- Name of the Health Care System or Sponsoring Organization
- Complete physical address
- Name of the Chief Administrative Officer for the sponsoring organization
- Name of the DSMT Coordinator
- ADA Recognition ID# (if applicable)
- Primary phone number
- Primary fax number
- Custom bar code ID (if applicable). Bar codes are located on the bottom of several reports and may be required by your Health Care System/Sponsoring Organization

#### Security (Tab 2)

Most DSMT programs use the password policies of their sponsoring organization as the password settings in DiaMed. The HIPAA compliant password settings include:

- Days before password expiration
- Customizable password strength

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<sup>1</sup> American Diabetes Association. Education Recognition Program. <http://www.diabetes.org/for-health-professionals-and-scientists/recognition/edrecognition.jsp>

## ***Education Center(s):***

### **General (Tab 1)**

- Name of the diabetes education center/site
- Complete physical address
- Name of DSMT Coordinator
- Primary phone number
- Primary fax number
- Center identifier (if applicable)

### **Setting (Tab 2)**

- Service Area
- Setting

### **Methods (Tab 3)**

- Special needs population served at site
- Methods used to overcome barriers to learning
- DSMT methods

### **Education Records (Tab 4)**

- Acknowledgement that each participant's permanent record includes documentation of the required items

### **Curriculum (Tab 5)**

- Acknowledgement that the written curriculum includes all of the required content areas

### **Continuous Quality Improvement (CQI) and Outcomes (Tab 6)**

- Acknowledgement of a formal CQI process
- Category(ies) of individualized behavioral outcomes which are documented/tracked by the DSMT program
- Selected outcomes measure(s) for the DSMT program

## User(s):

### General (Tab 1)

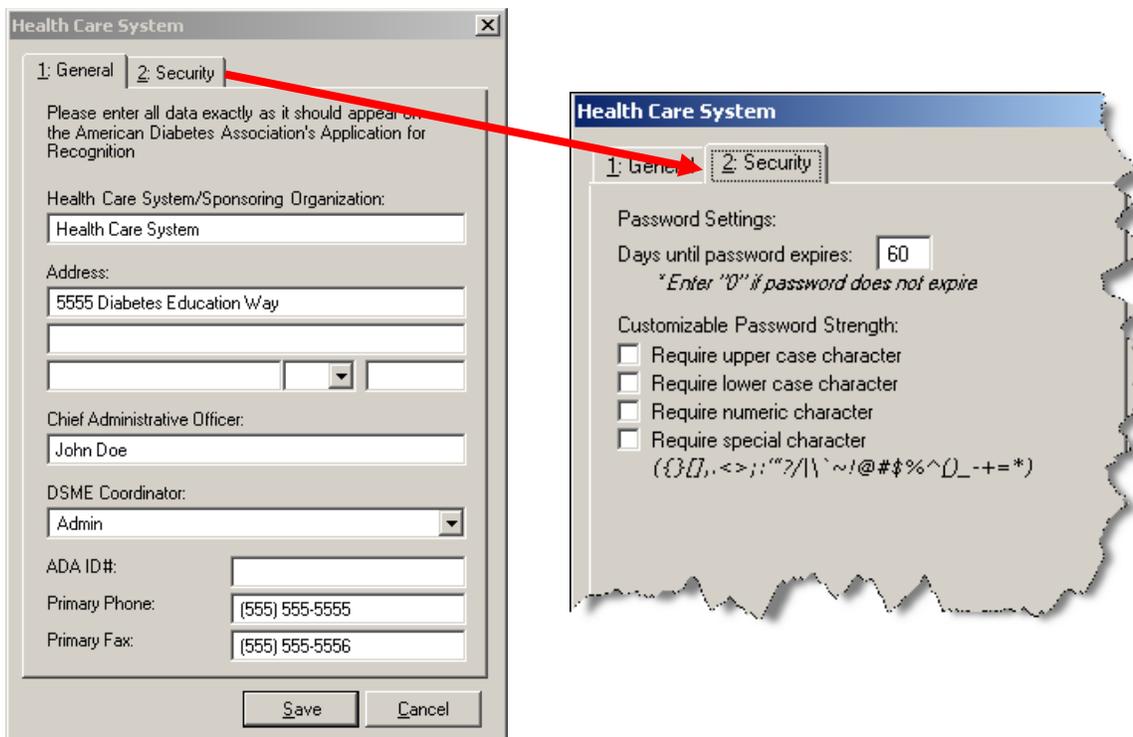
- Log-in name
- Full name including first, middle initial, and last name
- Role of the user (options include Restricted User Admin, System Administrator, Center Administrator, Educator, and Data Entry. See [Creating a User Account in DiaMed](#) for details on each role)
- As applicable, up to three user credential(s) including license number(s) and expiration date(s). (It is important that *Credential 1* is the RN, RD, or other professional license to be used on the ADA Education Recognition Application)
- As applicable, CDE number and expiration date
- Electronic signature for patient records
- Primary phone number
- Primary fax number
- Primary email address
- User's start date (first date of employment)

### Assigned Sites (Tab 2)

- Diabetes education site(s) to which the user will have access
- Whether the user is an “instructional staff member” and/or an “instructional team member” at each assigned site (*Instructional Staff Member* – experienced, skilled, in a CDE eligible type of health profession who works with the client in the process of DSMT; *Instructional Team Member* – responsible for the oversight of the program ensuring that the program meets the National Standards during the 3 years of Recognition<sup>2</sup>)

## Creating the Health Care System/Sponsoring Organization

Now that you have gathered all of the necessary information, you can begin customizing DiaMed for your diabetes program and sponsoring organization. Log in to DiaMed and click on *Administration* on the *Menu Bar*. Choose *Health Care System* from the list of options. Double click (or highlight, right click and choose *Edit*) on *Default Health Care System* to open the *Health Care System* window for editing. Enter all of the requested information on both the *General* and *Security* tabs of the *Health Care System* window and then hit *Save*. To cancel and changes, hit *Cancel*.



You will not be able to designate a DSME Coordinator for the Health Care System until you have created a DiaMed user account for the coordinator. Once you have created the user account (see [Creating a User Account in DiaMed](#)), you can re-open the *Health Care System* window by double clicking on the Health Care System, choose the Coordinator from the drop-down list of users, and hit *Save*.

## Creating an Education Center in DiaMed

Once you have finished setting up your Health Care System, it is time to create the Education Center(s) for your DSMT program. To do this, go to *Administration* on the *Menu Bar*, choose *Health Care System* and either click *Add Education Center* on the *Health Care System Toolbar* (or highlight and right click on your Health Care System or highlight and right click on *Education Centers*) and choose *Add Education Center*. Complete the necessary information on the *Education Center/Site* window and hit *OK* to save the center to your Health Care System. Repeat this process for each diabetes education site within your DSMT program.

Education Center/Site

5: Curriculum | 6: CQI & Outcomes

1: General | 2: Setting | 3: Methods | 4: Education Records

Center/Site Name: Diabetes Outpatient Education Center

Address: 1111 Diabetes Education

Diabetes | AL | 11111

Coordinator: [dropdown]

Phone: (111) 111-1111

Fax: (111) 111-1111

Center Identifier: 1235

OK Cancel



The term “Center” used throughout DiaMed is synonymous with ADA’s term “Site”, which is defined as a permanent address/location with appropriate resources for instruction at the location<sup>2</sup>.



You will not be able to designate a Coordinator for the Education Center/Site until you have created a DiaMed user account for coordinator. Once you have created the user account (see [Creating a User Account in DiaMed](#)), you can re-open the *Education Center/Site* window by double clicking on the Education Center, choose the Coordinator from the drop-down list of users and hit *Ok*.

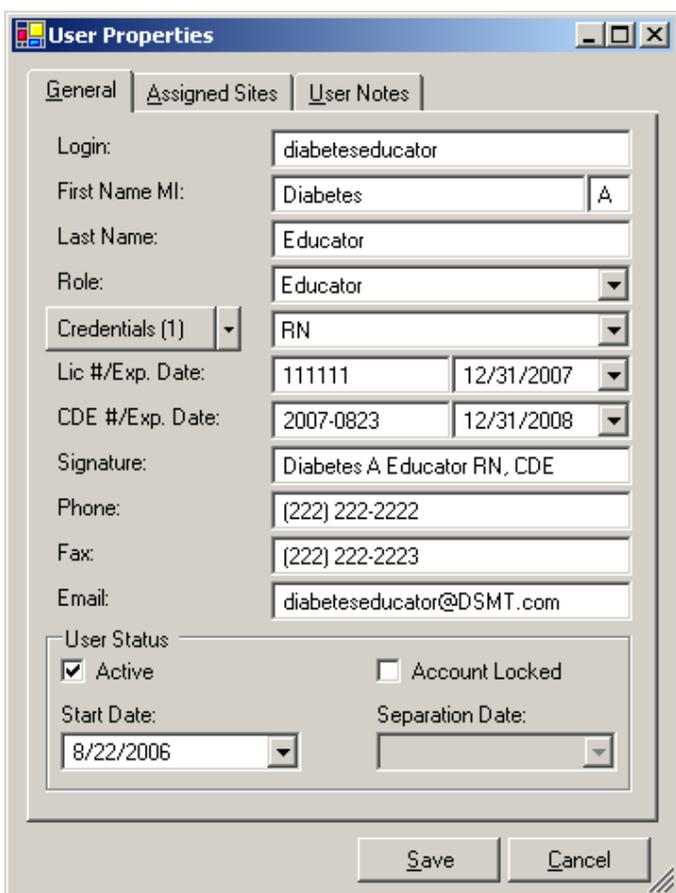
<sup>2</sup> American Diabetes Association. 6<sup>th</sup> Edition Education Recognition Instructions, April 2005.

## Creating a User Account in DiaMed

Now that you have created the Health Care System and Education Center(s) for your DSMT program, it is time to create accounts for each individual who will be utilizing DiaMed for data entry and patient and program management.

To add a user, go to *Administration* on the *Menu Bar*, choose *Health Care System*, and click *Add User* on the *Health Care System Toolbar*. Complete the necessary information on the *User Properties* window and hit *Save* to add the user to your Health Care System. Repeat this process for all DiaMed users.

### User Properties – General (Tab 1)



- **Login:** the unique username the user will use to log into DiaMed
- **First Name, MI, Last Name:** the users full legal name
- **Role:** the user's assigned role. Choose from System Administrator, Center Administrator, Educator, or Data Entry (see [User Roles](#) below)
- **Credentials:** the user's professional credentials. Choose from the list of CDE eligible health professions and enter the associated license number and expiration date. Up to three unique credentials can be recorded for each user (in addition to the CDE)
- **CDE:** the user's certified diabetes educator license number and expiration date
- **Signature:** the user's official electronic signature
- **Phone:** the user's primary phone number
- **Fax:** the user's primary fax number
- **Email:** the user's primary email address
- **User Status:** whether the user is Active or Inactive (changed by checking the box) and the user's start date (official employment date with the DSMT program). When/if a user becomes inactive, uncheck the *Active* box and document the user's separation date.



When adding user credentials, make sure that the first credential (*Credential 1*) is the credential that you want to appear on the ADA application for Recognition<sup>2</sup>.

The name and contact information for each user are utilized in several DiaMed reports and when submitting an automated help request or suggestion to Chiron Data Systems. It is important, therefore, that the user information is accurate and up to date at all times.

## User Roles

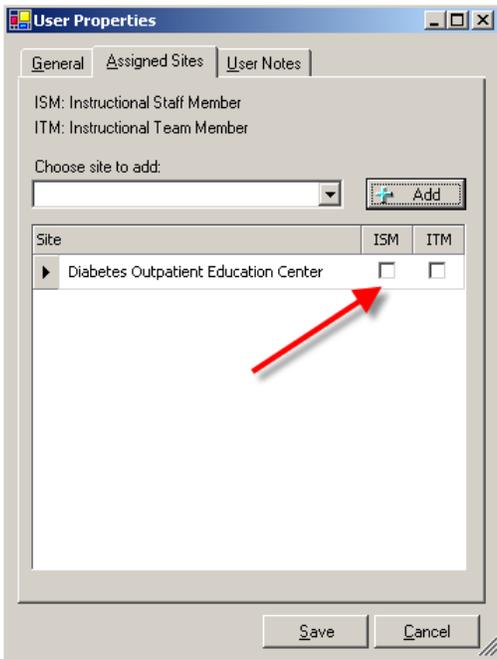
Each DiaMed user must be assigned a *Role* in order for the user account to be created and saved. User roles are tied to access and security.

The following is a list of the available user roles and associated access rights:

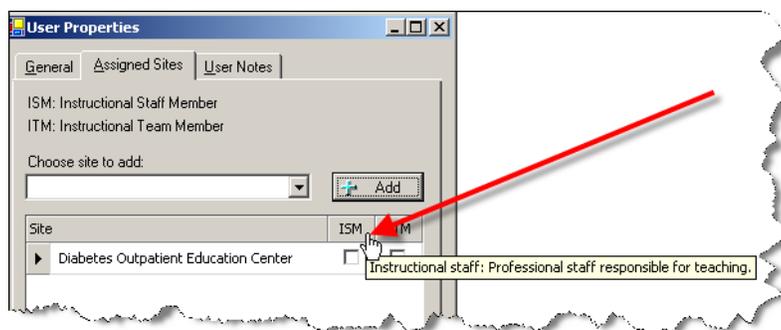
- **Restricted Admin** – access is limited to locking and unlocking user accounts and resetting user passwords.
- **System Administrator** – access to all features and functionalities of DiaMed. Ability to manage and report on all aspects of the DSMT program across all DSMT centers.
- **Center Administrator** – access to most features and functionalities of DiaMed. Managing and reporting capabilities are specific to their assigned DSMT center(s), program, staff, and patients. Access to all reports except the application for ADA Education Recognition.
- **Educator** – access is limited to documenting and managing the patient records at their assigned center(s) and managing their own user profile (except *Role*). Also has ability to run several reports.
- **Data Entry** – access is limited to documenting in the patient records at their assigned education center(s) and managing their own user profile (except *Role*). Also has ability to run several reports. The key distinction between the *Educator* and *Data Entry* roles is in the documentation of the education record...data entry personnel cannot be recorded as the educator.

## User Properties – Assigned Sites (Tab 2)

In order for a user to log in to a particular diabetes education center, the user must be assigned to that center on his/her *User Properties*. To assign a user to a site, simply click on the *Assigned Sites* tab, choose the site to add the user to using the drop down list of education sites, and click *Add*. Once the site has been added to the *User Properties*, you may indicate whether the user is a member of the instructional staff and/or instructional team at each assigned site by checking the appropriate box.



In the event that you are unsure whether the user is an instruction staff or instructional team member (or both), hold your cursor over the acronym and the definition of each role, as specified by the ADA<sup>2</sup>, will appear.



To discontinue a users access to a center, highlight the site by clicking on the arrow to the left of the site and hit *Delete* on your keyboard. Confirm that you would like to delete the site from the *User Properties* and click *Save*. The user will no longer have access to the patient records and/or reporting at this site.

## User Properties – User Notes (Tab 3)

Customized notes can be stored in each user account. Select the *User Notes* tab in the *User Properties* window and document user specific information in the free text field.

Once the necessary *User Properties* information has been documented, hit *Save*. The following window will appear alerting you that the default password for the new user is *password*.



When logging in to DiaMed for the first time, the user will use the *login* designated on his/her *User Properties* and the password *password*. The user will be prompted to change his/her password upon initial log in.

## Managing a User Account in DiaMed

### Editing a User Profile

The System Administrator and Center Administrator can edit a user's profile. To edit the information in a user's profile, simply click on *Administration* on the *Menu Bar* and select *Health Care System*. Click on *Users* under your Health Care System and a complete list of DiaMed users for the Health Care System will show up on the right hand side of the DiaMed screen.

Once you have located the appropriate user in this list, double click on the user name (or highlight the user name, right click, and choose *Edit*) to pull up the *User Properties* window. Edit the necessary information on any of the three user tabs. Once you have completed the edit, hit *Save* to save the changes or *Cancel* to cancel any changes made.

## Deleting a User

The System Administrator and Center Administrator can delete a user from DiaMed. To delete a user, follow the same steps noted under [Editing a User Profile](#) to access the complete list of DiaMed users. Locate the user to be deleted, highlight the user name, and hit *Delete* on the *Health Care System Toolbar* (or highlight the user name, right click, and choose *Delete*). Confirm that the user should be deleted from DiaMed and hit *OK*.



Deleting a user from DiaMed will NOT delete the documentation already completed by the user.

To restore a user that has been deleted, you must contact Chiron Data System's support for assistance.



In the event that you want to remove a user's access to DiaMed, instead of deleting the user, you might consider making the user's account inactive. Inactivating a user will prevent the user from logging in to DiaMed, but will not remove the user's name from your DiaMed staffing records for the time period during which the user was active. To inactivate a user, go to *Administration*, select *Health Care System*, click on *Users* and locate the user name on the right hand side of the screen. Double click on the user name (or highlight, right click, and choose *Edit*) to pull up the *User Properties* window. Uncheck the *Active* box under *User Status* and note the *Separation Date*. Hit *Save* to save the changes.

Email: melanies@chirondata.com

User Status

Active  Account Locked

Start Date: 8/9/2007

Separation Date: 8/9/2007

Save Cancel

## Managing CEU's

The System Administrator and Center Administrator can manage the continuing education credits for all users in DiaMed. To enter, edit, delete, or print CE credits for a DiaMed user, follow the same steps noted under [Editing a User Profile](#) to access a complete list of DiaMed users. Locate the appropriate user from the list on the right hand side, highlight the user name, right click, and choose *Manage CEU's*. This will pull up the *Continuing Education* window for the user.

## Adding Continuing Education Credits

To add CEU's to a user's record, follow the steps in [Managing CEU's](#) to access the *Continuing Education* window for the user. Enter the information for the continuing education and hit *Insert/Update CE Unit*. This will add the credits to the user's record.

CE Units By Topic			
Diabetes Specific	<input type="text" value="1"/>	Diabetes Related	<input type="text" value="0.5"/>
Psychosocial	<input type="text" value="0.5"/>	Educational	<input type="text" value="1"/>

3.0 Total Units

## Editing, Deleting, or Printing Continuing Education Credits

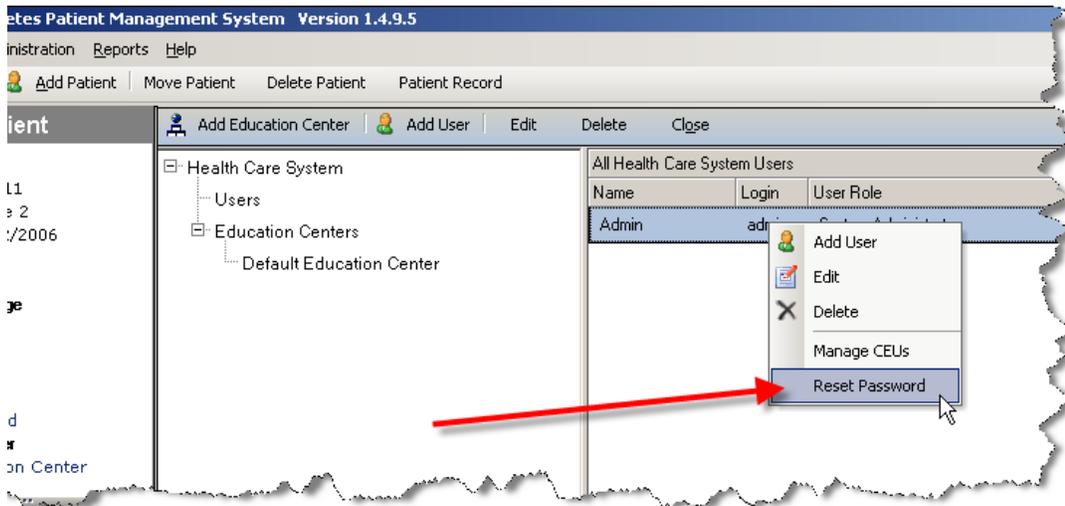
To edit, delete, or print CEU's for a user, follow the steps in [Managing CEU's](#) to access the *Continuing Education* window for the user. To edit a CE entry, highlight the entry, edit the information (*Program Title, Credentialing Body, CE Units by Topic*) and hit *Insert/Update CE Unit*. To delete a CE entry, highlight the entry, hit *Delete*, and confirm that you want to delete the CE credit from the user's record. To print the CE credits for a user, hit *Print* and a report of all document CE credits will print.



You can also access a comprehensive list of a user's CE credits by running the *Staff Summary Report*. Go to *Reports*, select *HR/Program Management*, then *Human Resources*, and hit *Staff Summary*. After running the report, locate the user name and click on it using your cursor. This will pull up the *Staff Detail* report which includes the Continuing Education Credits documented for the user.

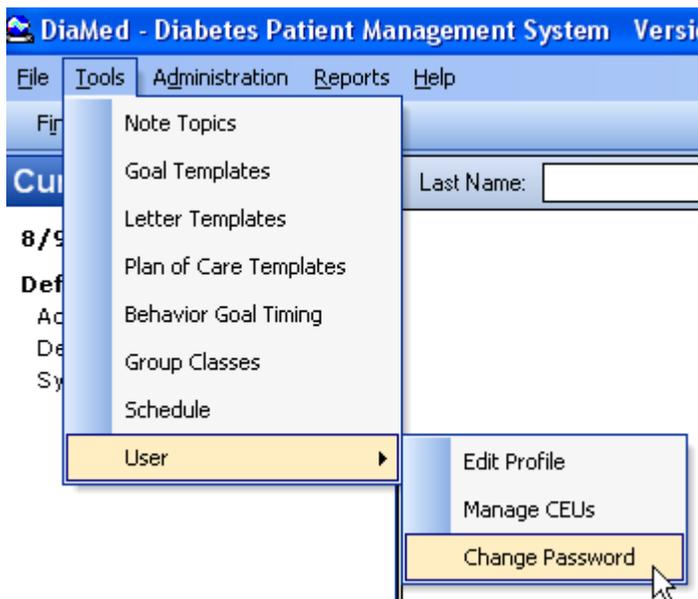
## Resetting a User Password

If a user forgets his/her unique password, the System Administrator, Center Administrator, or Restricted Admin users can reset the password. To reset the password for a DiaMed user, follow the same steps noted under [Editing a User Profile](#) to access a complete list of DiaMed users. Locate the appropriate user from the list on the right hand side, highlight the user name, right click, and choose *Reset Password*. This will pull up the *Change Password* window and allow you to reset to user's password. The user can now log into DiaMed using the new password.



## Changing Your Password

At any time, you can change your password using the *User* features on the *Tools* menu. Go to *Tools, User*, and click *Change Password* to access the *Change Password* window. Enter your new password and click *OK*.

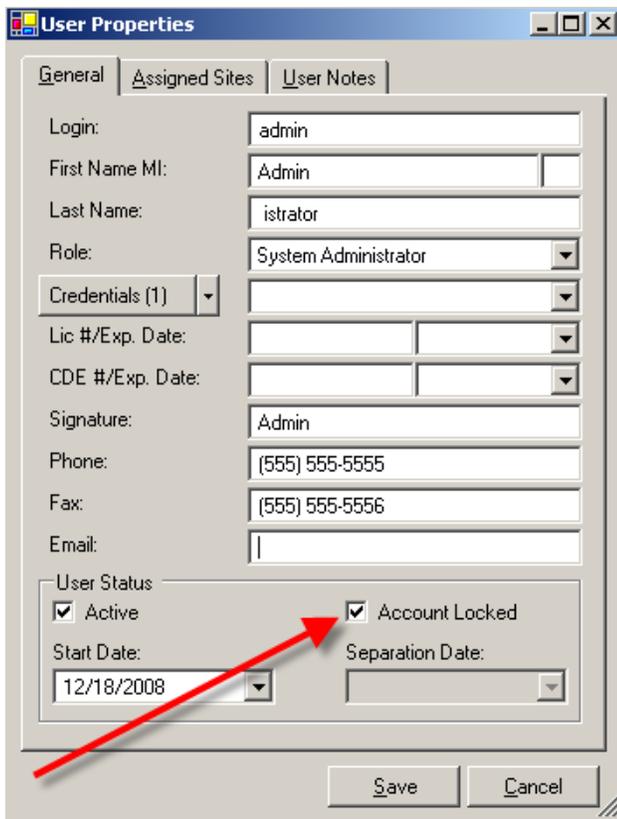


To comply with HIPAA security standards, DiaMed will not allow you to repeat a password until you have used five (5) unique passwords.

## Unlocking a User Account

System and Center Administrators and Restricted Admin users are able to unlock a user account that has been locked due to excessive unsuccessful log in attempts. To unlock a user account, simply go to *Administration* on the *Menu Bar* and select *Health Care System*. Click on *Users* to pull up a list of all users within the Health Care System and locate the appropriate user name. Highlight the name and either click *Edit* on the *Health Care System Toolbar* or right click on the user name and select *Edit*. This will pull up the *User Properties* window.

At the bottom right corner of the window you will see *Account Locked* is checked. Uncheck the box and hit *Save*. The account is now unlocked and the user can proceed with logging in to DiaMed.



The screenshot shows the 'User Properties' dialog box with the 'General' tab selected. The 'User Status' section at the bottom contains two checkboxes: 'Active' (checked) and 'Account Locked' (checked). A red arrow points to the 'Account Locked' checkbox. Below these checkboxes are 'Start Date' and 'Separation Date' fields. The 'Start Date' is set to 12/18/2008. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

General	Assigned Sites	User Notes
Login:	admin	
First Name MI:	Admin	
Last Name:	istrator	
Role:	System Administrator	
Credentials (1)	[Dropdown]	
Lic #/Exp. Date:	[Dropdown]	
CDE #/Exp. Date:	[Dropdown]	
Signature:	Admin	
Phone:	(555) 555-5555	
Fax:	(555) 555-5556	
Email:	[Empty]	
User Status		
<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Account Locked	
Start Date:	Separation Date:	
12/18/2008	[Dropdown]	
[Save] [Cancel]		

## Creating Your DSMT Curriculum in DiaMed

### *Setting up your DSMT Program(s)*

#### **Creating an Education Program**

To create a customized curriculum in DiaMed, simply go to *Administration*, select *Curriculum*, and click *Add Program* on the *Curriculum Toolbar* (or highlight a program name, right click and choose *Add Program*). Type in the program name, note whether the records of the participants participating in the program should be included in your ADA Recognition application by checking the box, and click *Add*. This program is now a part of your DSMT curriculum and is available for documentation at all diabetes education sites.



When setting up your curriculum in DiaMed, consider creating a separate program for each “category” of patient education provided through your diabetes education center(s). For example, you could create unique programs for your pre-diabetics, insulin pumpers, Medical Nutrition Therapy patients, or for your pre-pregnancy consults. By doing this, you can use DiaMed’s reporting features, which allow you to report by “program”, to analyze data and outcomes for each specific education program or to aggregate the data across all programs.

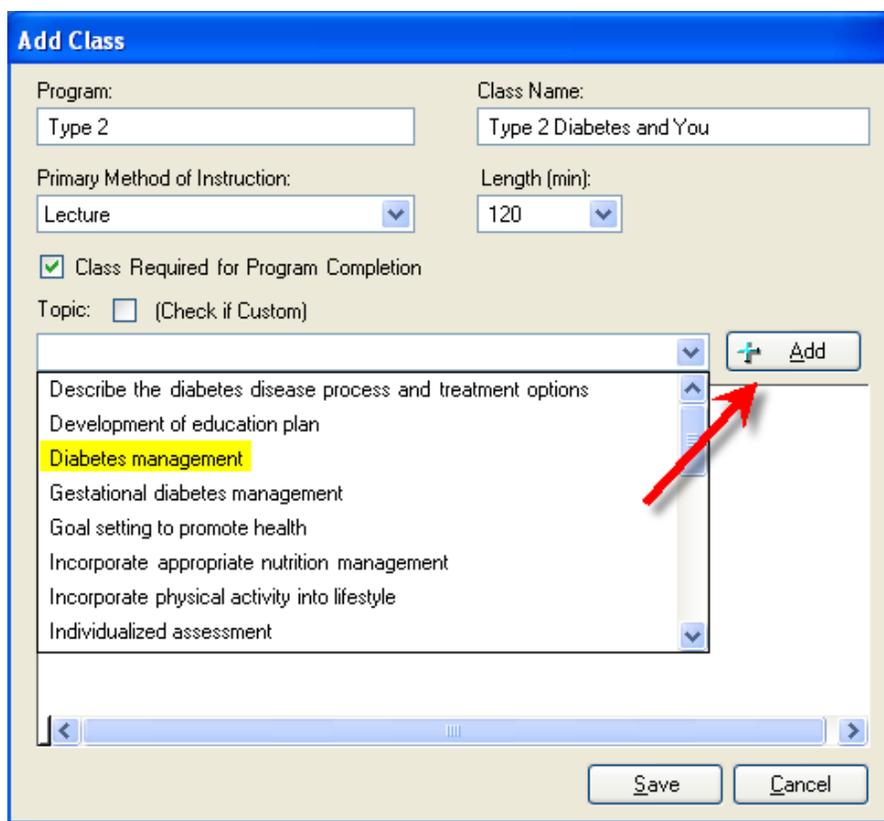
#### **Editing an Education Program**

If you would like to edit a program at any time, highlight the program name and click *Edit Program* on the *Curriculum Toolbar* (or right click on the program name and choose *Edit Program*). Revise the program name and/or whether the participant records should be included in the ADA Recognition Application, and click *Update*.

## Adding a Class to an Education Program

To add a class to a DSMT program, highlight the desired program name and click *Add Class* on the *Curriculum Toolbar* (or right click on the program name and choose *Add Class*). This will pull up the *Add Class* window. Enter the class name, the primary method of instruction, and the length of the class in minutes. Check whether or not the class is required for “program completion” (used for ADA Application and reporting purposes) and enter the topics for the class.

Topics can either be selected from the list of content areas from Standard Seven (7) of the National Standards for Diabetes Self-Management Education<sup>3</sup> or can be customized for your particular DSMT program.



To choose class topics from the content areas of the National Standards, open the *Topic* dropdown list, highlight the appropriate topic, and hit *Add*.

To add a custom topic to the class, check the *Check if Custom* box, type in the custom topic, and hit *Add*.

Once you are finished creating the class, hit *Save*.



When creating specific classes for each education program, it is recommended that you create the class using the length and topics that are typical for a particular class or patient encounter. Then, at the time of documentation, the educator can adjust the class length or delete any topics that were not covered. For example, if you are creating a pre-diabetes class and know that some participants are taught SMBG and some are not (based on their individual diabetes management goals), add the topic “monitor blood glucose and use the results to improve control”. At the time of documentation, the educator can remove the SMBG topic if it was not covered.

<sup>3</sup> Mensing C, et al. National Standards for Diabetes Self-Management Education. *Diabetes Care*.2003 Jan; 26 Suppl 1:S149-56

## Viewing a Class

To view a class, highlight the class name and the class details will show up on the right hand side of the DiaMed screen.

## Editing a Class

To edit a class, highlight the class and double click (or right click and choose *Edit Class* or choose *Edit Class* on the *Curriculum Toolbar*) to open the *Add Class* window for editing. Make the necessary changes, and choose *Save*. To delete a topic from the class, highlight the topic and hit *delete* on your keyboard.

## Deleting a Program or Class

You may permanently delete a program or a class from your Curriculum at any time by highlighting the program or class name and clicking *Delete Program/Class* on the *Curriculum Toolbar* or by right clicking and selecting *Delete Program/Class*.



The Type 1, Type 2, and GDM default programs in DiaMed cannot be deleted. You can, however, rename these programs, as desired, to reflect the unique program offerings of your Education Center.