

SUPPLEMENT 2

Pre-Transition Visit Educator Guide (CREATED Nov 16, 2018)**Target Audience:**

- Youth aged 16-18 years with type 1 diabetes
- Using a customized electronic health record (EHR) report, the diabetes administrative assistant will run the report the 1st of each month to identify eligible patients for the following 2 months (e.g., Feb 1 – run report for appointments in March and April; April 1 – run report for appts in May and June). One appointment per half day clinic will be scheduled with priority given to patients closest to 16 yrs. Appointment tracking in the EHR “Diabetes Interim Clinic Report”.

Format:

- 45-minute scheduled appointment with diabetes educator (nurse educator or dietitian) same day (right before or right after) routine clinic appointment
- Independent appointment (without parent/guardian)

General goals of visit:

- Identify status of self-management skills/tools for transition so that achievements and goals can be specified. Gaps in knowledge/health management to be addressed over next two years and beyond. You might instinctively want to address gaps as they arise but try to “park it” for further discussion at an upcoming visit
- Introduce MyChart (patient portal)
- Brief discussion re: transition to adult care

TASK LIST:**Explain limits of confidentiality first.**

- 1. Review and complete “Self-Management Skills” section of “Diabetes Interim Clinic Report Flowsheet” within the EHR.**
 - NB – THIS IS A GUIDE ONLY. Time may not be sufficient to address all items and that's OK. Not all items applicable to each patient. Some items will be obvious and ideally completed at prior visit (e.g., glucometer testing). ITEMS IN CAPS SHOULD BE PRIORITIZED.
 - Answers are: can do this alone, some help needed, lots of help needed, unable, does not apply, other (if you choose other, write a comment).
 - See “[Diabetes Interim Clinic Report: Self-Management Skills with Sample Questions](#)” (below) for specific questions for each item (items listed in order of appearance in flowsheet which is alphabetical with an attempt to keep categories together).
- 2. Provide applicable educational material (e.g., illness management handout if identified as a gap)**
- 3. Identify TOP 3 SELF-MANAGEMENT GOALS to be achieved within 1-2 years (educator can help identify these) and documents these in “patient instructions”. Route encounter to the**

patient's physician to help ensure follow up. If appropriate, can copy and paste key point/goals into "Specialty Comments" in "Snapshot" of the EHR.

4. **Arrange for follow-up as appropriate (e.g., if carb counting identified as a weakness, arrange f/up with dietitian either at next visit or via email/telephone).**
5. **Check MyChart (patient portal) status. Provide application form or link, and pamphlet (need MRN too) and encourage sign-up. This will allow two way messaging as well as easy access to appts, results, health issue list, medications, allergies (which they can update).**
6. **Mention that there are options with respect to transition to adult care (at age 18 yrs) and that the best way to find out about these will be to attend the transition evening (held twice per year). Provide "Adult Diabetes Clinic in Champlain handout"**
7. **Offer opportunity to bring parent/guardian in for summary (particularly of goals). This is not required and should be up to the youth.**

Diabetes Interim Clinic Report: Self-Management Skills with Sample Questions

Each bullet is a row item. Sub-bullets show guiding questions to aid evaluation.

- A1C – Understands meaning
 - What is A1C a measure of? Over what time period?
- A1C – Understands implications if high
 - Why is it important to keep it in target/close to target?
- ALCOHOL SAFETY PRECAUTIONS
 - What effect does alcohol have on BGs?
 - What can be done to ensure safety while drinking?
- Appointment management
 - Who is responsible for this?
- Carb counting
 - “Do you feel that you can carb count on your own? (“Could do a mini quiz here – what’s a typical lunch for you... how many carbs is that?”)
- CGM insertion
 - “Can you insert your CGM?”
- CGM uploading
 - “Can you upload your CGM to your computer?”
- CGM programming
 - “Can you make changes to settings, alarms etc.?”
- CGM interpretation and response
 - “Let’s say you have a normal BG at bedtime, have a snack and bolus but keep waking up high. You notice that your CGM is in target until about 3 am. What might the problem be? How will you address this?”
- Complication and comorbidity screening understanding
 - “Do you know why we do blood and urine tests every few years? Eye exams?”
- DKA PREVENTION
 - “When should you check for ketones and what would you do if positive?”
- DRIVING SAFETY PRECAUTIONS
 - “What do you do to make sure you are safe to drive?”
- EXERCISE/ACTIVITY COMPENSATION
 - “Do you manage your diabetes differently (extra food/less insulin) before/during/after activity/exercise and can you manage this?”
- FGM x 4 (same questions as for CGM)
- Glucometer programming
 - “Can you change date, change settings etc?”
- Glucometer testing (this should be a given, but is in there so that we can start tracking at a young age)
- Glycemic trend tracking (paper or eLogbook)
 - “Do you keep track of your BGs somewhere”
- Glycemic trend recognition
 - “Do you look back at your BGs and notice when a change needs to be made”
- Glycemic trend response/ADJUSTMENTS
 - “If you noticed a pattern, like always high at supper, what would you do?”
- HYPOGLYCEMIA TREATMENT (ORAL)
 - “When (at what BG level) would you treat a low, and how?”
- Hypoglycemia treatment (glucagon minidosing)

- “Do you know how to do this?”
- Hypoglycemia treatment – severe (including glucagon use) (*I’m realizing that this one may not be appropriate as they would need help with this... maybe making sure it’s up to date, accessible for others etc.?*)
- ILLNESS MANAGEMENT
 - “How does illness affect your BGs? What should you do differently while sick?”
- Insulin calculations (understands how ratios, corrections... work)
 - “If your ratio is 1:5, what does that mean?”
 - “How (generally) is your ISF used for corrections? If corrections weren’t working (not bringing BG down enough), how would you adjust your ISF?”
- Injections (pen, syringe) – simply, can they do this?
- Insurance coverage understanding – general understanding
- Prescription and supplies management – are they doing this?
- Pump boluses – simply, do they know how (should be yes at this age)
- Pump insertions
 - “Can you insert your own infusion set?”
- Pump settings changes
 - “Can you make changes to basal, ratios, ISF, set temp basals etc.?”
- Pump uploads
 - “Can you upload to your computer?”
- Pump upload understanding
 - “Can you make sense of the reports you see on upload? Let’s say you have a normal BG at bedtime, have a snack and bolus but keep waking up high. What might the problem be? How will you address this?”
- Site rotation
 - “Are you rotating sites? Do you know why it’s important?”
- Support resources (who and when to contact)
 - General inquiry about who/when to call for help/support
- Travel precautions
 - “What sort of precautions do you take to make sure travel goes smoothly?” (letter, extra supplies, phone numbers, checked vs carry-on”