
PRE- VISIT

Reminder phone call 1 day before appointment – remind patient to bring medications and meter!
Review DiaWEB & Centricity

PROJECT SURVEYS

Patient Satisfaction

HEALTH HISTORY

Update self-care management and medications prn

CLINICAL ASSESSMENT

Weight	A1C
BMI	Blood Pressure
Glucose	
Foot Exam	

EDUCATIONAL FOCUS

Healthy eating (review)	Foot Care
Being physically active	Blood sugar targets prn
PHQ2/9	Diabetes and Depression

ACTION ITEMS

Set patient goal	Medication assistance
Revise meal plan prn	Community resource referral prn

HANDOUTS/SUPPLIES

Walking Plan Handout	Depression Handout
PHQ2/9 Forms	Medication Stickers prn

VISIT WRAP-UP

Have patient complete satisfaction card	DiaWEB & Centricity Entries
Visit Summary to PCP (Non-HTPN PCP)	