## Domain 4: Self-Management Education

**Competency:** Works with an interdisciplinary diabetes care team to tailor interventions to individual self-management education needs of the PWD.

### Healthy Eating

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<tr>
<th>Level</th>
<th>Objectives</th>
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| **Diabetes Educator Associate, Level 1** | Identifies general principles of healthy eating.  
Assists PWD with how to read a food label.  
Helps navigate PWD in grocery store tours.  
Provides instruction on completing a food record. |
| **Diabetes Educator Associate, Level 2** | Encourages people with diabetes to make healthy food choices.  
Identifies challenges to healthy eating, e.g., food insecurity, food desert location of home, inadequate finances to pay for both food and medicine. |
| **Diabetes Educator, Level 1** | Reviews meal plan and eating habits. Refers to Registered Dietitian (RD) for medical nutrition therapy (MNT) as appropriate.  
Teaches and reinforces principles of healthy eating.  
Teaches how to read food labels.  
Teaches basic principles of carbohydrates counting. |
| **Diabetes Educator, Level 2** | Reviews and discusses body mass index (BMI), weight trend, and food log in personal health record.  
Teaches advanced concepts of carbohydrate counting and meal-based insulin dosing as appropriate.  
Explains the relationship between food, activity, medication, and blood glucose in preventing hypoglycemia and hyperglycemia.  
Evaluates nutrition-related lab values and refers to RD as appropriate. |
| **Diabetes Educator, Level 3** | Uses comprehensive knowledge of nutrition and diabetes meal planning to provide or support MNT to / for PWDs with complex needs.  
Assess PWD’s ability to manage blood glucose with carb counting, continuous glucose monitoring (CGM), and /or insulin pumps.  
Assesses adequacy of daily nutrition intake and refers to RD as needed.  
Assists endurance/competitive athletes with meal planning for training and competition, or refers if appropriate. |

### Being Active
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| **Diabetes Educator Associate, Level 1**            | Discusses the importance of physical activity in diabetes prevention and management.  
|                                                     | Reviews, reinforces, and encourages general principles of safe and effective physical activity.  
|                                                     | Provides instruction on completing personal health record for activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| **Diabetes Educator Associate, Level 2**            | Encourages regular physical activity.  
|                                                     | Assists qualified staff with exercise sessions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| **Diabetes Educator, Level 1**                      | Verifies medical clearances for exercise program and refers to health care team members as needed.  
|                                                     | Provides guidelines for a safe activity plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| **Diabetes Educator, Level 2**                      | Explains the relationship between physical activity and blood glucose.  
|                                                     | Collaborates with PWD to develop a safe and effective activity plan.  
|                                                     | Assess effectiveness of individual activity plan/action plan/goal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| **Diabetes Educator, Level 3**                      | Develops an activity plan that accommodates variations in routine and endurance.  
|                                                     | Works with endurance/competitive athletes to develop a safe and effective diabetes self-management plan.  
|                                                     | Assess and reassess PWDs progress and ability to maintain their individualized activity plan.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| **Monitoring**                                      | **Level**                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| **Diabetes Educator Associate, Level 1**            | Demonstrates correct techniques in monitoring, e.g., blood glucose (BG), ketones, weight (wt), height (ht), waist circumference, body mass index (BMI).  
|                                                     | Identifies clinical measures that are out of range and appropriately refers to team members. Measures that maybe out of range include: A1C, BG, BP, wt, ht, waist circumference, BMI, and ketone testing.  
|                                                     | Reinforces standards of care for diabetes, e.g., preventive care, annual monitoring, follow-up care, DSMES.  
|                                                     | Provides instruction on completing personal health record for glucose monitoring.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| **Diabetes Educator Associate, Level 2**            | Teaches PWD the benefits of monitoring BG, ketones, wt, ht, waist circumference, and BMI.  
|                                                     | Encourages PWD to create and maintain a personal health record and discuss results at each visit with primary care provider (PCP) or health care team.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| **Diabetes Educator, Level 1**                      | Verifies medical clearances for exercise program and refers to health care team members as needed.  
|                                                     | Provides guidelines for a safe activity plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| **Diabetes Educator, Level 2**                      | **Verifies medical clearances for exercise program and refers to health care team members as needed.**  
|                                                     | **Provides guidelines for a safe activity plan.**                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| **Diabetes Educator, Level 2**                      | Explains the relationship between physical activity and blood glucose.  
|                                                     | Collaborates with PWD to develop a safe and effective activity plan.  
|                                                     | Assess effectiveness of individual activity plan/action plan/goal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| **Diabetes Educator, Level 3**                      | Develops an activity plan that accommodates variations in routine and endurance.  
|                                                     | Works with endurance/competitive athletes to develop a safe and effective diabetes self-management plan.  
|                                                     | Assess and reassess PWDs progress and ability to maintain their individualized activity plan.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| **Diabetes Educator, Level 1** | Demonstrates correct technique for blood glucose and ketone monitoring.  
Discusses benefits of monitoring. |
|---|---|
| **Diabetes Educator, Level 2** | Identifies appropriate meters for PWD with special needs.  
Serves as local resource on monitoring-related issues.  
Teaches and reinforces safe and accurate blood glucose monitoring.  
Works with PWD and diabetes care team to develop appropriate monitoring schedule.  
Teaches PWD to use results of A1C and blood glucose patterns to make informed decisions on diabetes self-management.  
Introduces and discusses pattern management, CGM, and insulin pumps as appropriate.  
Teaches and reinforces safe and appropriate use for CGM and insulin pumps. |
| **Diabetes Educator, Level 3** | Evaluates CGM records to achieve and maintain goals in high-risk PWDs.  
Works with endurance/competitive athletes to determine effective monitoring plan for training and competitions.  
Develops algorithm or protocol-based medication adjustments for changes in meal plan or exercise.  
Assesses PWD’s ability and appropriateness to use CGM.  
Serve as a resource for other healthcare professionals and community organizations that provide support for individuals who use insulin pumps and to family members or others who support the PWD.  
Assists PWD with advanced pattern management skills.  
Instructs health care professionals in various levels of pattern management.  
Conduct periodic assessments to evaluate changes in a PWD’s clinical condition, motivation, abilities, and life circumstances that may necessitate the need to reconsider appropriateness of CGM use. |

**Taking Medications**

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| **Diabetes Educator Associate, Level 1** | Identifies problems / barriers with taking medications as prescribed.  
Provides instruction on completing personal health record for medications.  
Reviews and reinforce importance of taking medications as prescribed. As appropriate, teach PWD memory techniques to use as tool to support adherence to medications regimen.  
Review and reinforces techniques to assist with medication adherence. |
Teaches / reviews safe disposal of sharps.

**Diabetes Educator Associate, Level 2**
- Teaches insulin preparation, storage, and administration under the supervision of a licensed health care provider.
- Teaches and reinforces safe use of medications, e.g., storage, expiration dates, travel.

**Diabetes Educator, Level 1**
- Identifies and explains the differences between prescribed oral and injectable medications for diabetes and co-morbid conditions.
- Discusses safe use and common side effects of prescribed diabetes medications.
- Teaches staff and patients on safe preparation, storage, administration of injectable medications and disposal of syringes and lancets.

**Diabetes Educator, Level 2**
- Discusses use of over the counter (OTC) medications, supplements, and complementary alternative medicine (CAM) and possible effects on glucose levels.
- Work with PWD and healthcare team to individualize the diabetes medication regimen.
- Support PWDs as they consider, initiate, and learn how to use an insulin pump.
- Coordinates the plan of care between the prescriber, insulin pump manufacturer, and insulin pump trainer during pump initiation and ongoing management.
- Obtain certification to provide training in the use of each specific brand and model of insulin pump with which they work.

**Diabetes Educator, Level 3**
- Works with PWD and diabetes care team to simplify medication regimens and find lower medication cost opportunities, when need is identified.
- Assesses for potential drug/drug or food/drug interactions and refer to pharmacist or registered dietitian as appropriate.
- Periodically assesses for changes in PWD’s clinical condition, motivation, abilities, and life circumstances that may necessitate the need to reconsider appropriateness of insulin pump therapy.
- Makes medication changes or follows medication adjustment protocols, or makes necessary recommendation to primary care provider.

**Problem Solving**

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<td><strong>Diabetes Educator Associate, Level 1</strong></td>
<td>Assists PWD with accessing community resources for everyday living support, e.g., housing, food stamps, food assistance programs, prescription assistance, activity centers, etc.</td>
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<td>Assists PWD in identifying problems and recording questions in personal health record for next health care team visit.</td>
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<td>Identifies barriers to achieving successful self-care behaviors and communicates to diabetes team.</td>
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<td>Navigates access to community resources for diabetes self-management education and support (DSMES) and medical nutrition therapy (MNT).</td>
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<tr>
<td>Role / Level</td>
<td>Objectives</td>
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<tr>
<td>Diabetes Educator Associate, Level 2</td>
<td>Supports / reinforces survival skills as appropriate, e.g., monitoring, medications, hypoglycemia/hyperglycemia, sick day management, travel and disaster plans, etc. Assists / reinforces plan for contacting health care provider.</td>
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<tr>
<td>Diabetes Educator, Level 1</td>
<td>Maintains a current community resource list to assist clients with everyday living needs, e.g., housing, mental health clinics food and prescription assistance, etc.</td>
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<tr>
<td>Diabetes Educator, Level 2</td>
<td>Reviews and updates local community resources list to keep current. Provides instruction on hypoglycemia and hyperglycemia prevention, detection, and treatment. Provides guidelines for sick day management, lab or diagnostic testing, surgery and faith-based customs. Collaborates with PWD to develop plan for when to contact diabetes health care provider. Collaborates with PWD to develop travel and disaster plans. Discusses actual or potential barriers to self-management care.</td>
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<tr>
<td>Diabetes Educator, Level 2</td>
<td>Evaluates local community resources that support everyday living needs for PWD. Facilitates problem solving / brain-storming techniques to help PWD identify solutions to barriers in their self-management.</td>
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<tr>
<td>Diabetes Educator, Level 3</td>
<td>Implements shared decision making in order to engage the PWD in the treatment plan. Identifies changes in medical/mental/physical status that affect the PWD’s ability to follow medical treatment plan and refers to appropriate team member.</td>
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<tr>
<td>Healthy Coping Level</td>
<td>Objectives</td>
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<tr>
<td>Diabetes Educator Associate, Level 1</td>
<td>Reviews personal health records for completeness. Encourages journaling attitudes and emotions in personal health record as needed. Lists signs and symptoms of depression and/or stress. Encourages PWD to share stressors with clinical staff to receive help. Navigates access to community resources for DSMES.</td>
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<tr>
<td>Diabetes Educator Associate, Level 2</td>
<td>Identifies signs and symptoms of depression or diabetes distress and refers to health care team. Facilitates support groups.</td>
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<tr>
<td>Diabetes Educator, Level 1</td>
<td>Distinguishes between physical and emotional effects of blood glucose levels variability.</td>
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Recognizes need for appropriate referrals to behavioral health resources as identified.  
Identifies resources of support and resources to assist with healthy coping.  
Organizes and facilitates diabetes support groups.  

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| Diabetes Educator, Level 2 | Distinguishes signs and symptoms of depression and diabetes distress.  
Identifies risk factors for depression and refers to appropriate team member.  
Provides ongoing support for PWD and encourages them to make use of available resources. |
| Diabetes Educator, Level 3 | Assesses PWD’s use of available resources and need for additional support.  
Probes for emotional and/or physical factors linked to depression and treats / refers as appropriate.  
Assesses for mild cognitive impairment (MCI) and makes appropriate referrals for follow up care/counseling.  
Assesses for diabetes distress and works with PWD to address areas that are causing stress.  
Provides or refers to behavioral health professional for support of diabetes-related distress and depression. |

### Reducing Risks  
**Level** | **Objectives** |
|-----------|---------------|
| Diabetes Educator Associate, Level 1 | Lists and teaches signs and symptoms of hypo/hyperglycemia.  
Reinforces the need for basic preventative and risk reduction measures, e.g., foot exams, eye exams, dental exams, lab measurements, smoking cessation, flu vaccines, and immunizations.  
Identifies principles of sick day management.  
Reinforces safety in activities in daily living.  
Uses guidelines to assist PWDs in treating hypoglycemia when needed.  
Teaches and reviews options for medical alerts IDs.  
Teaches and reviews safe disposal of pen and pump needles, syringes, and lancets. |
| Diabetes Educator Associate, Level 2 | Teaches importance of preventive examinations and vaccinations.  
Teaches importance of and techniques for daily foot care.  
Identifies medical emergencies and calls for immediate help. |
| Diabetes Educator, Level 1 | Discusses modifiable and non-modifiable risk factors for diabetes and associated complications.  
Provides information on risk reduction strategies and diabetes standards of care. |
| Diabetes Educator, Level 2 | Assists the PWD to implement and sustain a DSMES plan for optimal health outcomes.  
Strategizes with PWD to develop a risk reduction plan.  
Identifies eating disorders and other psycho-social risks and refers to behavioral health professional.  
Identifies signs and symptoms of mild cognitive impairment and refers to healthcare team.  
Facilitates training of DSMES program staff and primary care provider (PCP) offices on annual chart reviews to assure standards of care in diabetes prevention (labs, testing, etc.) are being ordered and reviewed with PWD. |
| Diabetes Educator, Level 3 | Implements and evaluates an education plan based on assessment of diabetes complications risks and strategies for reducing risks.  
Facilitates with coordination of care across specialty care, facility-based care, and community organizations.  
Facilitates PWD with the development of personal strategies to accommodate sensory or physical limitation(s), adapting to new self-management demands, and to promote behavior change.  
Facilitates training of DSMES program staff and PCP offices on how to interpret annual labs/testing to assess current status of disease progression and needs for additional medical/psycho-social interventions. |