

**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)	