



## **Group Visits: Types and Essential Elements**

### **CP3 Toolkit: Expanding Access**

Adapted from a [November 30, 2016 presentation](#) by Carolyn Shepherd, MD, formerly of Clinica Family Health, the following describes the types of group visits and essential components.

#### **Group Visit Types**

- Access groups with a PCP or care team
  - Goal is to improve access for when episodic demand exceeds supply
  - Leadership focus is on didactic education: well-child checks, newborn, diabetes screening, cold/flu, financial screening
  
- Continuity groups, always with PCP or care team
  - Goal is patient activation and engagement
  - Replaces a one-to-one visit
  - Care setting is in a space designed for groups
  - Patients remain in the same group for continuity
  - These groups target patients not thriving in traditional settings (e.g., poorly controlled chronic disease, unexpected utilization patterns)

#### **Essential Elements of Group Visits**

- Teams create group visits (Group Visits Committee)
- Create, test, apply checklists to build effective group visits
- Know what you want to accomplish-urgent temporary need for access or improving patient engagement in chronic disease
- Create content threads
- Incorporate activities that engage patients design patient self-assessment tools
- Create and use tools to walk you through the process-learn from your PDSAs
- Plan how to recruit and engage the patients
- Group visit communication plan-who, what, where, when
- Ensure adequate staff training
- Systematize tracking of visit logistics-date, locations, clinicians
- Be prepared for the visit-plan and prep
- Measure and compare outcomes
- Ensure adequate staffing