



## Group Visits Planning Form

### CP3 Toolkit: Expanding Access

Community health centers can use this resource to begin planning for shared medical appointments (e.g., group visits). The form describes more than 25 different elements that should be addressed in planning. This planning form is adapted from resources developed by Clinica Family Health in Colorado.

Proposed Group Visit Planning Form	
Group Visit Planning Component	How Component is Addressed
What data or information do we need up front in order to design this group?	
What patient needs are being addressed.	
Will this group be a Continuity Group Visit or an Access Group Visit?	
Which patients or visit type should be included in this group visit?	
What employees need to be included in this group and how many of each type?	
What is the minimum and maximum number of patients that should be included in the group visit?	
How often will the group visit occur?	



Proposed Group Visit Planning Form	
Group Visit Planning Component	How Component is Addressed
What is the total length of the group visit for the patient? (Arrival time – Departure time)	
What is the total length of the group visit for each staff member? (Arrival time – Departure time)	
At what point in the visit should each employee arrive to the group visit?	
What is the number of slots that need to be blocked in the provider's schedule?	
What is the best time of the day to hold the group visit?	
How does the patient get identified, scheduled and confirmed for the group visit?	
What information does the patient need prior to the group visit?	
What chart review is needed prior to the group visit?	
Is there chart prep that can be done prior to the group visit?	



<b>Proposed Group Visit Planning Form</b>	
<b>Group Visit Planning Component</b>	<b>How Component is Addressed</b>
Does the visit need “shadow” charts for patient engagement?	
What materials/supplies are needed in the group visit room?	
Who prepares the group visit room and when?	
How/where does patient get checked in for group visit	
Does patient pay a copay for the group visit?	
Who coordinates the GV and what is the role of the coordinator?	
What are the roles/ responsibilities of the Front Office employee?	
What are the roles/ responsibilities of the Financial Screener/Enrollment employee?	
What are the roles/ responsibilities of the Medical Assistant?	
What are the roles/ responsibilities of the Case Manager/Facilitator?	



<b>Proposed Group Visit Planning Form</b>	
<b>Group Visit Planning Component</b>	<b>How Component is Addressed</b>
What are the roles/ responsibilities of the Nurse?	
What are the roles/ responsibilities of the Behavioral Health Professional?	
What are the roles/ responsibilities of the Clinician?	
What are the roles/ responsibilities of the Group Visit Coordinator for this group?	
What needs to be measured/ reported for this group visit?	
Describe or flowchart the group visit flow.	
What are the proposed content threads?	
Miscellaneous Items/Issues to consider (e.g., any questions you still have).	