



**Group Visit Flow**  
**CP3 Toolkit: Expanding Access**

This planning sheet summarizes the components of a group visit, including the number and type of staff needed, frequency and duration of the visits (for provider and patient), the number of appointment slots used, and processes to document the visit. This has been adapted from Clinica Family Health in Colorado.

**Group Visit Name:**  
**Continuity or Access:**

# and Type of Employees Needed	How Often Visit Occurs	Time Required in Visit	# of Slots Blocked in Schedule
# Clinician (PCP)			
# BHP			
# Case Manager			
# MAs			
# Nurse			
# Dental			
# Nutritionist			
# Pharmacist			
# Financial Screener			
# Front Office Staff			
Other			

Who coordinates the group visit (GV) and what is the role of the management team?	
Which patients should be included in this GV?	
Number of patients scheduled for this GV?	
How long is the visit for the patient?	



Best timing: consider clinician and patient?	
How does a patient get identified, scheduled and confirmed for this GV?	
What information should be given to a patient prior to attending this GV?	
What gets entered in the EMR?	
Who enters what data and where it's entered into the EMR?	
What prep and set-up is needed in the GV room?	
What materials are needed to prep GV room for GV?	
How does patient get checked in for appointment?	
Visit Flow (Describe the flow from the time patient arrives until all post visit work is complete)	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> <li>7.</li> </ol>
Role of the Financial Screener.	
Role of the MA and information covered.	
Role of the clinician (PCP) and information covered.	
Role of the Case Manager and information covered.	



Role of the Behavioral Health Professional and information covered.	
Role of the Nurse and information covered.	
Role of the Front Office Staff and information covered.	
Role of the Nutritionist and information covered.	
Role of the Dental Staff and information covered.	
Role of the Pharmacy and information covered.	
Role of Other Staff and information covered.	
Steps to clean up and restock the group visit room.	
What needs to be tracked/measured and how often?	
Who collects and reports the data?	
Where is data reported?	
Planning/Admin	

Review and approved:

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