CLINICA family health

Site:
Provider:
Co-Facilitator(s): GV Date/Time:

DIABETES GROUP VISIT PLANNING CHECKLIST

WHO	WHEN	WHAT	CHECK! ✓
COM/Group Visit Coordinator	At least 1-2 months prior to group	Choose a provider to start a DMGV based on provider interest, panel size and access, and provider schedule	
COM/Group Visit Coordinator	At least 1 month prior to group	Meet with PCP to review DMGV training materials, location of DMGV materials, and recruiting process	
COM/Group Visit Coordinator	At least 1 month prior to group	Discuss training needs for staff (MA, CM, and OT) at site's GV Committee	
COM/Group Visit Coordinator	1 month prior to group	Ensure that CM has reviewed the DMGV CM Training PowerPoint	
MATM/ COM	1 month prior to group	If support staff (MA, CM, OT, Provider, RN, RD, Clin Pharm, BHP) have never participated in a DM group visit arrange a time to shadow a DMGV session Shadowing & Training Recommendations	
CM	1 month prior to group	Start recruiting for the group (print flyers to hang in exam rooms and give to provider and MA)– see the Recruitment Training for more info	
CM	1 month prior to group	Meet with the PCP to discuss best days and times for group and recruiting plan	
CM	1 month prior to group	Start calling DM patients on PCP's panel to invite to the group and identify best day and time for group – see script in P-Drive	
COM/Group Visit Coordinator	3 weeks prior to group	Update the GV Schedule in the P-Drive for Wendy to use to block the PCP's schedule	
COM/Group Visit Coordinator	3 weeks prior to group	Block a group visit room	

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MATM COM	2 weeks prior to group	Verify that support staff (MA, CM, OT, Provider, RN, RD, Clin Pharm, BHP) have reviewed the training powerpoint(s) Training Materials	
CM	2 weeks prior to group	Enter patients' names into NextGen	
CM	2 weeks prior to group	Fill out group visit indicator box in NextGen for each patient. See QTS for instructions	
CM	2 weeks prior to group	Send patients a hand-out which includes the group's calendar and information about the group	
MA	1 week prior to group	Create patient folders and store in secure location – see folder materials in P-Drive	
CM	1 week prior to group	Make a plan for the first session and discuss with the PCP (include activities, topic, guest speaker, and opening and closing activities) – see curriculum, topic ideas, and group prep materials	
CM	2 days prior to group	Do reminder calls and have all materials ready for the group	
MA	At least 1 day before group	Stock lab in group visit room	
MA	Day before or day of group	Review patients' CarePlanners with PCP to discuss labs, exams, and other needs	

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