CLINICA family health

Designing a Group Visit: GV Name

Goals for Group Visits

Improve or Maintain:

1. Patient Health Outcomes
2. Patient Access
3. Patient Activation
4. Organization Revenue

Table of Contents

SECTION 1: Intake 2
SECTION 2: Content Threads 5
SECTION 3: Training Materials 6
SECTION 4: Outcomes Measurement 7
SECTION 5: Operationalizing the GV 8
SECTION 6: Sustainability and Implementation Plan 9
SECTION 7: New GV PDSA 10
SECTION 8: Review Cycle 11

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 1: Intake

Instructions

GV Clinical Review Ad Hoc Committee or Subject Matter Expert (SME) please complete all questions in Section 1 as able.

**Note: Responses to questions 1 – 30 must be standardized across sites. Responses to questions 31 – 42 may vary for site implementation of Access Group Visits based on site needs and resources.*

1. Name of Group Visit	
2. Will this group be a Continuity group visit or an Access group visit?	
3. How does the group improve or hold steady the following four priorities:	
a. Patient Health Outcomes	
b. Patient Access	
c. Patient Activation	
d. Organization Revenue	
4. What are the specific outcomes to be measured for this Group Visit? Please specify SMART Goals: Specific, Measurable, Achievable, Realistic, Timely. High level overview. Please refer to Section 4: Outcomes Measurement.	
5. How will the outcomes be measured? High level overview. Please refer to Section 4: Outcomes Measurement.	
6. Please identify content threads: Bulleted list of topics to cover in group visit. Plus, link to entire curriculum if available. High level overview. Please refer to Section 2: Content Threads.	
7. Are there any training resources available for review/consideration? High level overview. Please refer to Section 3: Training Materials.	
8. Which patients or visit type should be included in this group visit?	
9. What is the minimum and maximum number of patients that should be included in the group visit?	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

10. What is the number of slots that need to be blocked in the provider's schedule?	
11. Describe or flowchart the group visit flow. For Access GV, please provide a flowchart for each site.	
12. What data or information do we need up front in order to design this group? a. Which providers are interested? b. List of patients for provider c. Frequency of visits and who is scheduling d. Room space e. Which staff to include in the group	a. Providers: b. Patients: c. Frequency: d. Room: e. Staff:
13. What information does the patient need prior to the group visit? Who provides this information and when?	
14. Does this group require a Shadow Chart for patients? If so, please explain what information is needed.	
15. Does anyone need to review the chart prior to the group visit?	
16. Is there chart prep that can be done prior to the group visit?	
17. What staff materials are available for use?	
18. What supplies are needed in the group visit room?	
19. What are the roles/responsibilities of the Front Desk OT employee?	
20. What are the roles/responsibilities of the Financial Screener/Enrollment employee?	
21. What are the roles/responsibilities of the Medical Assistant?	
22. What are the roles/responsibilities of the Case Manager/Facilitator?	
23. What are the roles/responsibilities of the Registered Dietician?	
24. What are the roles/responsibilities of the Nurse?	
25. What are the roles/responsibilities of the Behavioral Health Professional?	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

26. What are the roles/responsibilities of the Medical Provider?	
27. What are the roles/responsibilities of the Dental Staff?	
28. What are the roles/responsibilities of the Clinical Pharmacist?	
29. With this Group Visit structure, does the group visit create billable visits? How so/explain? (How much 1:1 provider/patient time does this group visit accommodate?)	
30. Does patient pay a copay for the group visit?	
**Note: Responses to questions 31 – 42 may vary for site implementation of Access Group Visits based on site needs and resources. Please specify each site's response to these questions.*	
31. List which employees need to be included in this group and how many of each type:	
32. How often will/should the group visit occur?	
33. What is the best time of the day to hold the group visit?	
34. What is the total length of the group visit for the patient? (Arrival time – Departure time)	
35. What is the total length of the group visit for each staff member? (Arrival time – Departure time)	
36. At what point in the visit should each employee arrive to the group visit?	
37. How does the patient get identified, scheduled and confirmed for the group visit?	
38. Who prepares the group visit room and when?	
39. How/where does patient get checked in for group visit?	
40. Who coordinates the GV and what is the role of the coordinator?	
41. How does the role of the Group Visit coordinator contribute to the success of the GV? What are the roles/responsibilities of the Group Visit Coordinator?	
42. Miscellaneous Items/Issues to Consider:	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 2: Content Threads

Instructions

GV Clinical Review Ad Hoc Committee or Subject Matter Expert (SME) please complete all questions in Section 2.

Curriculum Checklist	
1. What are the content threads? 2. Provide a checklist of topics. 3. Include links to any necessary resources and save all documents into appropriate GV folder: Content Threads (Including Patient Handouts)	1. Content Threads 2. Checklist of Topics 3. Links

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 3: Training Materials	
Instructions GV Clinical Review Ad Hoc Committee or Subject Matter Expert (SME) please complete all questions in Section 3.	
Staff Training Checklist 1. Who requires training? 2. What topics should be covered in staff training for each role? 3. Provide links to necessary resources and save all documents into appropriate GV folder: Training Materials.	1. Who 2. Topics 3. Links

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 4: Outcomes Measurement	
Instructions GV Clinical Review Ad Hoc Committee or Subject Matter Expert (SME) please complete all questions in Section 4.	
Measure Description: SMART Goals (Specific, Measurable, Achievable, Realistic, Timely)	Tool Description: What report or tool will be used to measure the outcome?
Measure 1	Tool 1
Measure 2	Tool 2
Measure 3	Tool 3
Measure 4	Tool 4
Measure 5	Tool 5

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 5: Operationalizing the GV	
Instructions GV Oversight Committee please complete all questions in Section 5.	
1. Create patient survey and determine survey distribution plan.	
2. What patient handouts or prep group tools are needed?	
3. Blocking: What blocking event and category will be used in NextGen? How is the schedule blocked: 1st slot blocked or all slots blocked?	
4. What information needs to be given to the Communications Center?	
5. Is the E-confirmation call set up properly (including correct GV name)?	
6. Will shadow charts be used?	
7. Communication Plan/Needs	
8. GV Flowchart (Please refer to Section 1 #9)	
9. Staff Training (Please refer to Section 3)	
10. What Confidentiality Agreement will be used for patients?	
11. What patient surveys will be used for this group, when will they be distributed, and what will be the data collection plan?	
12. Miscellaneous Items/Issues to Consider:	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 6: Sustainability and Implementation Plan	
Instructions GV Oversight Committee please complete all questions in Section 6.	
1. Describe the implementation plan for roll out to site(s).	
2. How will training occur for this group in the future?	
3. How will outcomes be monitored and where? (Please reference Section 4)	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 7: New GV PDSA	
Instructions: GV Oversight Committee please complete all questions in Section 7. Please ensure all information is entered into the PDSA Database. (Lauren add PPT link once get from Jennifer Snyder.)	
Plan	
Do	
Study	
Act	
NEXT STEPS: *(PDSA has been approved/declined by GVO or CDAG – what action is needed to move forward?)*	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED

CLINICA family health

SECTION 8: Review Cycle	
Instructions GV Clinical Review Ad Hoc Committee or Subject Matter Expert (SME) please complete question 1 in Section 8. GV Oversight Committee please complete questions 2-4 in Section 8.	
1. Name, role and site of assigned SME(s) completing form and Clinical Review Ad Hoc Committee completion date.	
2. GV Oversight Committee review completion date	
3. Review cycle due date (to occur every 2 years once Phase 2 complete)	
4. Complete list of review dates (month and year)	

CLINICA FAMILY HEALTH
COPYRIGHT 2017
ALL RIGHTS RESERVED