

# Group Visit Operational Readiness Checklist

Practitioner Name: \_\_ Program Name: \_\_ Cohort Start Date: \_\_ Session Number: \_\_

## Section 1: Legal & Administrative Foundation

Complete this section during the "Enrollment & Onboarding" phase to ensure the "Sacred Container" is protected.

- [ ] **Mutual Confidentiality Agreement:** Every participant has signed the legally binding agreement regarding peer privacy.
- [ ] **Group Informed Consent:** Includes "Voluntary Disclosure" and "No Crisis Care" clauses.
- [ ] **Billing Method Confirmed:**
  - [ ] Medical (99213/14 - requires 1-on-1 component)
  - [ ] Education (S9445 - Group Education)
  - [ ] Program/Cash-Pay Fee
- [ ] **Triad Staffing Assigned:**
  - [ ] Lead Practitioner: \_\_\_\_\_
  - [ ] Health Coach (Facilitator): \_\_\_\_\_
  - [ ] Admin/Medical Assistant: \_\_\_\_\_

## Section 2: Environment & Workflow Execution

Use this checklist to prepare the "Healing Environment" (Virtual or Physical) and manage session flow.

| Phase       | Action Item  | Status |
|-------------|--|--------|
| Pre-Session | Functional Questionnaires/Labs collected (7 days prior)                | [ ]    |
| Space Prep  | Circular seating (Physical) OR Waiting Room/Branded Backdrop (Virtual) | [ ]    |
| 00-15 Min   | <b>Check-in:</b> Review group norms and "Sacred Container" values      | [ ]    |
| 15-45 Min   | <b>Education:</b> Clinical "Reveal" and "Target" teaching              | [ ]    |

| Phase        | Action Item  | Status |
|--------------|--|--------|
| 45-75 Min    | <b>Group Coaching:</b> "Optimize" phase and individual adjustments | [ ]    |
| 75-90 Min    | <b>Wrap-up:</b> "Sustain" goal setting and summary                 | [ ]    |
| Post-Session | Clinical notes/documentation completed (within 24 hours)           | [ ]    |
| Post-Session | Group Summary email sent (No individual names mentioned)           | [ ]    |

### Section 3: Session Reflection & Quality Control

**Group Dynamic Score (1-10):** \_\_\_ (1 = Disconnected/Chaos | 10 = High Engagement/Safety)

**Administrative Bottlenecks Observed:**

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**Clinical Themes for Next Session:** (Common questions or lab patterns identified during the Reveal phase)

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### Next Steps:

- [ ] Review "Sustain" goals at the start of next session.
  - [ ] Adjust tech/lighting/seating based on feedback.
  - [ ] Update EHR "Smart Phrases" for next session's common educational topics.
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*AccrediPro Standards Institute Certified Tool Operationalizing Group Visits: Logistics and Legalities (Lesson 4)*

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