

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)	<input type="checkbox"/>
Space Prep	Circular seating (Physical) OR Waiting Room/Branded Backdrop (Virtual)	<input type="checkbox"/>
00-15 Min	Check-in: Review group norms and "Sacred Container" values	<input type="checkbox"/>
15-45 Min	Education: Clinical "Reveal" and "Target" teaching	<input type="checkbox"/>

Phase	Action Item	Status
45-75 Min	Group Coaching: "Optimize" phase and individual adjustments	[]
75-90 Min	Wrap-up: "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:

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

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.

AccrediPro Standards Institute Certified Tool Operationalizing Group Visits: Logistics and Legalities (Lesson 4)
