

# **Implementing Group Medical Visits: A Guide for Medical Teams**

## Introduction

**Group medical visits**, or shared medical appointments, involve patients with common chronic conditions or risk factors receiving care in a group setting. These sessions integrate educational and interventional components, delivered by a multidisciplinary team, to support shared decision-making and develop personalized health plans. They empower patients to actively manage their health while fostering community through shared experiences.

### **Benefits of Group Medical Visits:**

1. **Patient Empowerment:** Patients gain enhanced education and self-management skills, enabling them to actively manage their health conditions.
2. **Enhanced Patient Experience:** A multi-disciplinary supportive and interactive group setting fosters higher satisfaction through meaningful engagement.
3. **Improved Health Outcomes and Reduced Costs:** Research highlights that group visits empower patients to adopt effective self-management strategies, resulting in better control of chronic conditions. This proactive approach can reduce emergency room visits, hospitalizations and overall healthcare costs.
4. **Efficient Provider Workflow:** Physicians increase productivity by simultaneously addressing multiple patients, reducing wait times and improving care delivery with measurable health outcomes.
5. **Fostering Community:** Patients benefit from shared experiences, learning from each other's challenges and successes while building a sense of connection and support.

### **Incorporating Personal Health Management in Group Medical Visits**

1. **Pre-visit Assessments:** Utilize personalized tools to evaluate health status as well as knowledge, and skills related to managing chronic conditions.
2. **Individual Interactions:** Integrate brief one-on-one interactions during group activities for tailored assessments and interventions.
3. **Personalized Plans:** Guide participants in translating learned strategies into practical, personalized health plans tailored to their needs.
4. **Goal setting and Follow-Ups:** Facilitate shared decision-making to establish personal health goals and encourage ongoing follow-ups with their healthcare team.

## Planning and Preparation

- **Assess Needs:** Identify patient populations that would benefit from group medical visits
- **Set Goals:** Define specific and measurable objectives that focus on improving knowledge and self-management skills and support shared decision-making regarding management.
- **Team Roles and Responsibilities:** Identify group facilitators and administrative staff to support group medical visits. Consider training and continuing professional development for program delivery.

***Thinking about your practice:***

**Exercise 1**

**Are there any conditions that you could foresee delivering a group medical visit for?**

**Exercise 2**

- **Which facilitators would be critical to your group medical visit?**
- **Do you have specific individuals in mind?**
- **What needs to be considered to engage your facilitators?**

## **Logistics and Resources**

- **Scheduling and Space:** Plan the timing, location, number and length of sessions, day of the week, and whether they will be offered virtually or in person.
- **Equipment and Supplies:** Consider necessary materials such as chairs, whiteboards, projectors, laptop and screen as well as educational materials and stationery.
- **Technology for Virtual Group Medical Visits:** Plan for setting up video conferencing platform, webcam and microphone and troubleshooting.

## Patient Engagement

- **Recruitment Strategies:** Develop plan for inviting and enrolling patients. Consider self enrolment versus referral or combination of both. Consider physician and allied health involvement in identifying paneled patients who may benefit from group-based program.
- **Eligibility criteria:** Consider health conditions, accessibility, linguistic and cultural considerations as well as inclusion and exclusion criteria.
- **Communication:** Develop strategies to inform patients about upcoming offerings and the benefits and structure of group medical visits.
- **Patient Preparation:** Prepare patients for their first group medical visit session.

## Conducting group medical visits

- **Session Structure and content:** Develop program structure and outline. Prepare presentation content and design pre- and post-assessment tools. Consider involving patient advisors in the curriculum and program design.
- **Design Workbook:** Develop workbook content including visual aids, handouts, practical tips, interactive activities, personalized action plans and resource lists.
- **Facilitation Techniques:** Consider strategies for leading discussions and managing group dynamics.
- **Patient Interaction:** Prepare verbal and written consent for email and virtual communication if needed. Plan to encourage group participation and develop strategies to address individual concerns during program delivery.

## Documentation and Billing

- **Accurate Record Keeping:** Maintain detailed and accurate records of each group visit. Consider standardized visit templates.
- **Program Summary:** Create a comprehensive summary of the program for the primary physician.
- **Billing Practices:** Understand billing practices for group-based programs.
- **Outcome Measurement:** Track program acceptability and effectiveness.

## Evaluation and Improvement

- **Feedback Collection:** Gathering input from patients and team members using quantitative and qualitative measures.
- **Data Analysis:** Reviewing outcomes and making data-driven decisions
- **Continuous Improvement:** Strategies for refining future offerings.

## **Appendices**

- **Sample Forms and Templates:**
  - Program outline and structure
  - Self-referral poster
  - Fracture risk assessment
  - Exercise and Nutrition Health Plan
  - Program evaluation tool
  - Risks and Benefits

**- Sample Program Outline**

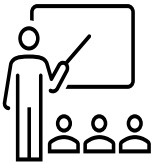
<p><b>Week 1</b></p> <p><b>Location:</b></p> <p>Classroom (180006), WC computers, and Multipurpose room (180015)</p>	<ul style="list-style-type: none"> <li>- <b>15 mins Asking patients to arrive early for intake and consents</b></li> <li>- <b>50 mins Intro &amp; MD content</b> in Classroom <ul style="list-style-type: none"> <li>o General intro</li> <li>o Overview of the 4 weeks, orientation to the workbook and overview of any tools we will provide</li> <li>o Review of osteoporosis/age-associated bone loss</li> <li>o Fracture risk factors and fracture risk calculation (<i>WC computers</i>)</li> </ul> </li> <li>- <b>10 min</b> break (<i>recipe sample provided in classroom</i>)</li> <li>- <b>20 mins Nutrition content</b> <ul style="list-style-type: none"> <li>o Calcium &amp; Vit D requirements/recommendations</li> <li>o Brief overview of balanced pattern and home prepared foods as relates to bone health</li> </ul> </li> <li>- 5 Mins move to Multipurpose room</li> <li>- <b>25 mins Exercise content</b> in Multipurpose room <ul style="list-style-type: none"> <li>o Goals and benefits of Exercise</li> <li>o Overview of recommendations/guidelines</li> <li>o Posture &amp; Strengthening: Back exercises/spinal strengthening</li> </ul> </li> <li>- <b>10 mins</b> Debrief &amp; discussion from Week 1; reminder week 2 starts in multipurpose room</li> </ul>
<p><b>Week 2</b></p> <p><b>Location:</b></p> <p>Multipurpose room (180015) and Wellness Kitchen</p>	<ul style="list-style-type: none"> <li>- <b>10 mins</b> Check in/ what did I try in multipurpose room</li> <li>- <b>60 mins</b> larger block of activity (<i>focus topic</i>) <ul style="list-style-type: none"> <li>o 15 mins didactic content</li> <li>o 45 mins activity</li> </ul> </li> <li>- <b>10 min</b> break &amp; transition to kitchen</li> <li>- <b>30 min</b> Demo and recipe samples in the Wellness Kitchen</li> <li>- <b>10 mins</b> Checkout/goals Debrief &amp; discussion from Week 2 in kitchen; reminder - week 3 starts in Classroom</li> </ul>
<p><b>Week 3</b></p> <p><b>Location:</b></p> <p>Classroom (180006) and Multipurpose room (180015)</p>	<ul style="list-style-type: none"> <li>- <b>10 mins</b> Check in/ what did I try in classroom</li> <li>- <b>25 mins</b> Exercise content</li> <li>- <b>50 mins MD content</b> <ul style="list-style-type: none"> <li>o Review fracture risk/consequences of fracture</li> <li>o Medication options</li> </ul> </li> <li>- <b>10 min</b> break (<i>recipe sample provided in classroom</i>)</li> <li>- <b>15 min</b> Label reading</li> <li>- <b>10 mins</b> Checkout/goals Debrief &amp; discussion from Week 3 in classroom; reminder week 4 - hands-on session in kitchen</li> </ul>
<p><b>Week 4</b></p> <p><b>Location:</b></p> <p>Wellness Kitchen and Classroom (180006)</p>	<ul style="list-style-type: none"> <li>- <b>10 mins</b> Check in/ what did I try in kitchen</li> <li>- <b>45 mins</b> Nutrition Demo and Hands-on, samples</li> <li>- <b>5 min</b> transition to classroom</li> <li>- <b>15 mins</b> Didactic nutrition content (in classroom)</li> <li>- <b>5 min</b> break</li> <li>- <b>30 mins</b> Review key concepts from all disciplines; Continuing the changes; Checkout/goals Debrief &amp; discussion from the series</li> <li>- <b>10 mins</b> Wrap up and Post questionnaires</li> </ul>

**Facilitators**  
Osteoporosis Specialist + Family Physician  
+ Dietitian + Physiotherapist

**Participants**  
8-10 participants with 10-year  
fracture risk >10%, or personal  
history of prior low-trauma fracture



**Patient Medical Home and  
Integrated Health  
Neighbourhood**



**Education**  
Osteoporosis and risk factors  
for fracture



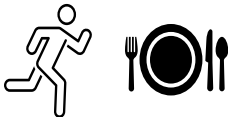
**Personal bone health  
workbook**



Personalized fracture risk  
assessment using FRAX tool



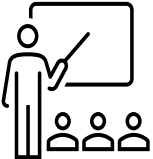
Reflection on fracture risk



**Intervention**  
Hands-on culinary medicine  
training, and supervised exercise



Reflection on anticipated risk reduction with  
pharmacotherapy and lifestyle



**Education**  
Pharmacotherapy to reduce  
fracture risk



Calculation of absolute fracture risk  
reduction with pharmacotherapy,  
diet and exercise

Values and preferences  
recorded in workbook



**Shared Decision Making**  
Personalized health plans involving  
pharmacologic and non-  
pharmacologic strategies





## Own Your Bones

Throughout this hands-on, interactive program, learn about bone health and the different treatment options for osteoporosis.

### You will

- Understand your fracture risk.
- Learn practical information about nutrition and food choices to promote bone health. Practice food preparation skills with a registered dietitian.
- Learn about exercise guidelines and spine-safe movement. Participate in guided exercise sessions led by a physiotherapist.
- Learn about medical treatments.
- Make informed decisions with support from a specialist and a family physician.

### Program Format:

4 weeks – 2 hour sessions once per week. Offered in English and in person only.

### Your commitment:

Make the course a priority. Attend weekly sessions and practice skills regularly.

### When:

**Wednesdays**

**April 9, 16, 23 and 30**

**1:00 – 3:00 pm**

### How do you get into the program?

For Adults (50+) interested in learning more about bone health and fracture prevention. The educational and nutritional advice in this program might not be right for people with specific dietary restrictions (i.e. difficulty swallowing, had bariatric surgery or those with chronic kidney disease).

**Self-refer by calling 403-956-2300 or discuss with your family doctor for a referral.**

### Location:

Wellness Centre, South Health Campus, 4448 Front Street SE, Calgary

# Own Your Bones

## Your Personal Risk Factors

Please complete the following section to indicate your risk factors:

Age \_\_\_\_\_

Sex M \_\_\_\_\_ F \_\_\_\_\_

Weight \_\_\_\_\_

Height \_\_\_\_\_

BMI \_\_\_\_\_

*Please circle Yes or No*

Previous fracture after age 40 yrs:      Yes    No

Parental hip fracture (before age 80 yrs): Yes    No

Current smoker:                                      Yes    No

Taking glucocorticoids (eg. prednisone):    Yes    No

Have rheumatoid arthritis:                      Yes    No

Consume 3 or more alcoholic  
drinks per day:                                      Yes    No

## What about bone density?

Bone density is simply an estimate of bone strength. Bone density is expected to decline in all healthy people as they age. Your bone density today may be slightly lower than any measurements done in past years although any bone density performed in the past four years is probably reasonable for clinical decision making today. In many cases, the bone density measurement doesn't really change the clinical decision making because the other risk factors are just as important.

## Your Bone Density Results:

Lumbar spine T-score: \_\_\_\_\_

Femoral neck T-score: \_\_\_\_\_

- The T-score simply tells you how your bone density compares to what is the AVERAGE of a young person of your sex
- A negative T-score means 'below the average'
- The bigger the number, the farther away from the average you are
- You may see the terms "osteopenia" or "osteoporosis" written on your bone density report. These terms, as applied to bone density, are probably unnecessary since we will be focused upon the risk of fracture, not the actual numeric bone density result. Many people with low bone density can be low risk for fracture and some people with normal bone density can still be high risk for fracture.
- **Remember, the majority of menopausal women and men over age 50 will have a T-score of -1.5 or less**



# Wellness Kitchen

## Own Your Bones

### My Bone Health Management Plan: **Nutrition Plan**

#### General Nutrition

Think about your overall dietary habits. Is there anything you'd like to continue to do? Is there anything you'd like to change?

Habits I will keep:

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Habits I will start, stop, or change:

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#### Home Cooking

Think about how frequently you eat food cooked at home. Would you like to change anything about this? Are there habits that might help you to achieve your goals?

Habits I will keep:

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Habits I will start, stop, or change:

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#### Calcium Intake

Current Intake: \_\_\_\_\_

Target Intake: \_\_\_\_\_

Habits I will keep:

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Habits I will start, stop, or change:

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#### Vitamin D Intake

Current Intake: \_\_\_\_\_

Target Intake: \_\_\_\_\_

Habits I will keep:

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Habits I will start, stop, or change:

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#### Protein Intake

Current Intake: \_\_\_\_\_

Target Intake: \_\_\_\_\_

Habits I will keep:

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Habits I will start, stop, or change:

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# Own Your Bones

## My Bone Health Management Plan: **Exercise Plan**

I feel motivated, confident and ready to start exercise. Please check one

- Yes (complete the plan on the right)
- No (start with questions below)

What action steps do I need to take to get started with my plan? *(Example: buy running shoes, find a class, ask for help)*

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What questions do I have?

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Who will I ask for help?

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What else might be getting in the way?

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To improve my **posture and back strength**, I will:

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Minutes per day: \_\_\_\_\_

Days per week: \_\_\_\_\_

Where I will do it: \_\_\_\_\_

When I will do it: \_\_\_\_\_

To improve my **balance**, I will:

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Minutes per day: \_\_\_\_\_

Days per week: \_\_\_\_\_

Where I will do it: \_\_\_\_\_

When I will do it: \_\_\_\_\_

To improve my **strength**, I will:

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Minutes per day: \_\_\_\_\_

Days per week: \_\_\_\_\_

Where I will do it: \_\_\_\_\_

When I will do it: \_\_\_\_\_

To improve my **aerobic fitness**, I will:

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Minutes per day: \_\_\_\_\_

Days per week: \_\_\_\_\_

Where I will do it: \_\_\_\_\_

When I will do it: \_\_\_\_\_

## Sample Program Evaluation Tool

Page 4

**This section asks you to provide some additional information about your experience with the Own Your Bones program.**

**Please indicate whether you agree or disagree with the following statements:**

	Strongly disagree	Disagree	No opinion	Agree	Strongly agree
The program content was relevant to my health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The instructor(s) were knowledgeable of the subject topics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The instructor(s) preparation and delivery of the material was effective	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The program workbook supported and reinforced my learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The hands-on exercise component of the program was relevant to my needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The hands-on cooking component of the program was relevant to my needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The program was interactive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The program provided a good mix between listening and group activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The program length was suitable for the material covered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I learned something new as a result of the program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can apply what I learned to my health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This program was an effective use of my time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt comfortable expressing my opinion in the group setting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have increased my knowledge about important topics since participating in this program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend this program to others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



April 2025

### Exercise

Exercise has benefits for bone health. It is recommended for people with bone loss, including those with Osteoporosis, even those who have had a spine or hip fracture.

You will have the chance to exercise during the **Own Your Bones** sessions. It is important that you understand the risks and benefits of participating in exercise. Please read the following and ask if you are unsure about anything or if you need more information.

#### 1. About the exercise component

- Exercise sessions will be led by a Bone-Fit™ trained Physiotherapist. A Kinesiologist, who is a health professional that specializes in exercise, will also be in the sessions.
- Exercises provided are recommended by Osteoporosis Canada, Too Fit to Fracture, and Bone-Fit™.
- The clinicians teaching the exercise class may not know your full medical history. Pain, previous fracture, or limited mobility may require modifications to exercise. Please discuss any questions or concerns with the exercise team directly.
- A review of safe movement strategies will be provided on day 1, and instruction will be provided for all exercises covered in class.

#### 2. Risks of injury is possible in all physical activity but is minimal and rare. The risks are:

- Muscle soreness, increased pain and/or fatigue;
- Loss of balance or falling which can lead to fracture or other injury;
- Movements that are rapid, forced, or to the end of range could lead to fracture;
- Improper use of equipment that leads to injury;
- Changes to blood pressure, oxygen saturation levels, blood sugar levels or heart rate.

Participating in **Own Your Bones** lowers these risks by providing:

- Education about safe movement strategies;
- Exercises selected help to slow bone loss, prevent falls and lower fracture risk;
- Instruction and supervision by health professionals.

#### 3. Benefits (include but are not limited to)

- Exercise can slow bone loss and promote bone health;
- Exercise improves muscle strength and balance so that you are less likely to fall;
- Exercise can help manage other health conditions and can lead to better overall health;
- You will learn the parts of an exercise program for bone health and get a chance to practice. You will also learn about ways to modify if you have a previous fracture or a high fracture risk.

#### 4. Alternatives include finding a Bone-Fit provider or Physiotherapist in the community who can provide individual counselling and exercise prescription; joining a community program focused on bone health or fall prevention; or not exercising.



### Nutrition

#### 1. About the nutrition component

Nutrition and cooking sessions in the Wellness Kitchen will be led by Registered Dietitians who are experts in food and nutrition. Topics and recipes were chosen to help you make food and nutrition choices to improve your bone health and reduce your risk of fracture.

#### 2. Risks

Risk of injury is possible whenever preparing food in a kitchen. In the Wellness Kitchen steps will be taken to minimize risk of injury by providing appropriate instruction, equipment, and demonstration of recipes. Risks can include:

- Slips, trips, burns, cuts or other injuries. To minimize risk for injury in the kitchen ensure you are dressed appropriately by wearing closed toed shoes, avoiding long scarves with loose ends or flowing sleeves, tying back long hair and trimming fingernails.
- Exposure to food allergens. Participants will be preparing and tasting food. Recipes cannot be altered for the classes. You may opt out of activities if you are not comfortable. Please discuss any food allergies or intolerances with the registered dietitian prior to the class.

#### 3. Benefits (include but are not limited to)

- Nutrition can slow bone loss and promote bone health
- Nutrition can help manage other health conditions and can lead to better overall health
- Preparing and tasting recipes can help you put the nutrition information from the program into practice
- You will also learn about ways to modify the recipes, equipment, and food choices to fit your preferences, comfort in the kitchen, lifestyle, and mobility

4. **Alternatives** include finding a registered dietitian in the community who can provide individual counselling and nutrition intervention; joining a community program with a registered dietitian focused on bone health and bone healthy cooking.

**Your choice to participate in the program activities will be taken to mean that you understand the risks and benefits of participation. You are welcome to opt out of any of the program activities if you do not feel comfortable participating.**