ROLES AND RESPONSIBILITIES

SMAs usually require a well-trained staff performing specific roles and responsibilities, which will vary, depending on the individual requirements of the particular SMA model. Some responsibilities are handled before the group visit, while others are performed on the day of the SMA. General responsibilities of SMA team members are listed below and do not reflect model-specific responsibilities. See the Shared Medical Appointments Training Guide for additional information about the roles and responsibilities of SMA team members.

**PHYSICIAN** 1,2,3

- Participate in planning the group visit with the SMA team
- Invite suitable patients to an upcoming SMA during every routine office visit
- Review charts and identify problems for review with individual patients
- Day of SMA
  - Cofacilitate discussion and group visit with the nurse (CHCC model) or the facilitator (DIGMA or Physicals SMA)
  - Provide education to the group
  - (If no documenter on team) Document all visits
REGISTERED NURSE/MEDICAL ASSISTANT\textsuperscript{1,3,4}

- Participate in planning the group visit with the SMA team
- Coordinate materials and information for the group visit
- Assist physician in identifying potential patients for SMA
- Invite suitable patients to an upcoming SMA during every routine office visit
- Pull charts before the SMA and review
  
  **Day of SMA**
  - Escort patients to exam room (for DIGMA and Physicals SMA)
  - Take vital signs
  - Do exams and immunizations as needed
  - Cofacilitate group meeting with physician (for CHCC model)
  - Identify those patients needing individual attention
  - Oversee duties of support staff
  - Schedule patient follow-up visits, referrals, procedures; give patients after-visit summary
  - Enter data into registry, if appropriate

FACILITATOR (BEHAVIORIST) FOR DIGMA AND PHYSICALS SMA\textsuperscript{1,3}

- Participate in planning the group visit with the SMA team
- (In absence of training personnel) Conduct SMA team training
- **Day of SMA**
  - Start the group visit on time
  - Handle group dynamics and psychosocial issues
  - Conduct the group alone when the physician is doing private exams

DOCUMENTER FOR DIGMA AND PHYSICALS SMA\textsuperscript{1}

- **Day of SMA**
  - (If licensed to be with disrobed patient): Accompany physician from one exam room to the next and complete chart notes
  - Abstract information from health history form completed by each patient
  - Record discussion during interactive group segment
COORDINATOR/ADMINISTRATOR/SCHEDULER\textsuperscript{1,3}

- Participate in planning the group visit with the SMA team
- Schedule meeting and exam rooms
- Schedule physician, RN/MA, documenter
- Assist in recruiting patients for SMA
  - Invite patients who come for individual appointments
  - Assist with mailings to patients
- Make telephone calls to remind patients about the visit
- Assemble patient materials
- 1 day before SMA
  - Set up meeting room
  - Take charts and supplies to meeting room
SPACE REQUIREMENTS

Group visits need adequate space to be properly conducted. There should be a comfortable room with enough chairs for all patients and guests who are scheduled to attend, as well as a nearby exam room stocked with the necessary equipment and forms for the physician to conduct private exams or discussions as needed.²

The nurse or medical assistant may also use the exam rooms, usually during the first part of the SMA, to take vital signs, identify routine health maintenance needed for each patient, and partially complete forms for preventive tests and procedures.¹³

Before the meeting begins, prepare the room and necessary materials. This can include⁴:
- Having a flip chart or whiteboard available for noting patients’ concerns
- Obtaining all needed medical charts and placing in group room
- Setting up tables and chairs

For CHCC SMAs, prepare a mobile cart with the following supplies³:
- Name tags for group attendees and staff
- Copies of the day’s agenda
- Educational materials
- Portable blood pressure cuffs
- Stethoscopes
- Immunization consent forms
- Syringes, alcohol wipes, bandages, sharps container
- Radiology request forms
- Lab request forms
- Tape, markers, three-hole punch, pens, pencils
- Tissues
- Diagnosis and procedure forms

Next Week:
SMA MODEL WALK-THROUGH - Part 4
IMPLEMENTING THE
GROUP VISIT PROGRAM
LAUNCHING THE PILOT
SMA PROGRAM
References