

Sample Telephone Invitation Script

Hi Mr./Ms. **(NAME)**. This is **(NAME)** calling from Dr. **(NAME)**'s office. It's nothing urgent – is this a good time?

<Yes> Last week we sent you an invitation (*or email*) for a Group Medical Visit, specifically for people with **(CONDITION)**. Did you receive it? **<If yes, proceed with script below. If no, explain concept and confirm address/email address>**

Great – We're really excited to be offering these special appointments for our patients. They're new for us, but other doctors' offices that offer Group Medical Visits say their patients really enjoy and benefit from them.

What questions do you have? **<Answer questions>**

<If in-person> Can I confirm that you'll attend the visit? If you have any questions, please feel free to contact me. Otherwise we will see you at **(LOCATION)** at **(TIME)** on **(DATE)**.

OR

<If virtual> Can I confirm you have a Smartphone/Tablet or Computer/Laptop (with webcam/microphone or headset) and high-speed Internet or 4G LTE connection? Are you comfortable with using Zoom for Healthcare, or giving it a try? **<If yes to all, proceed. If no, offer care as per normal>** Can I confirm that you'll attend the visit? I will send you another email with all of the details you need. If you have any questions, please feel free to contact me. Otherwise we will see you on Zoom at **(TIME)** on **(DATE)**.

End Call

Potential questions by patients:

Q. What is a Group Medical Visit?

A. Group medical visits are a type of medical visit where patients are seen as a group for follow-up care or management of chronic conditions. These visits are voluntary and provide a secure and confidential setting where patients have longer time with their health care team. Unique to a group setting is that you will have the opportunity to have your answers and concerns addressed as well as learn from the concerns and questions raised by other people living with similar conditions.

Q. Will I still see the (Physician/NP) alone?

A. It depends. You will have a brief examination that may be private or semi-private with **(Physician/NP)**, as well as time with them in the group setting. You are also welcome to make an appointment with your provider anytime as you normally would.

Q. Will I have to talk about private issues?

A. The group will consist of patients who have been diagnosed with **(CONDITION)**. You will be asked questions as a group, and encouraged to share your experiences. You may have ideas that would be very helpful for others to hear and learn from. You may also find it comforting or helpful to hear from others in the same situation as you. **You will never be put on the spot, or made to share.** Everyone in the group will

agree that they promise to keep everything from the session confidential and not share personal information about anyone with others. But because this is a group, the ability to maintain confidentiality is not the same as in your 1:1 time with **(Physician/NP)**.

Q. What sorts of things are discussed?

A. The topics discussed will be related to **(CONDITION), such as managing medications, nutrition, physical activity, goal setting and general wellness options to help live as healthy as you can.** Discussion will focus on questions you or other patients have. These will be discussed in the group so that everyone can contribute their experiences and learn. There may be guest experts from time to time as well. In general, group visits allow you to spend more time with your doctor and the health care team and allows more time for discussions and problem-solving. Most patients really enjoy the opportunity to get to know the health care team and other patients.