

Pre-Group Screening and Orientation Instruction Guide

Some providers may ask why we need to complete pre-group screenings. There are multiple reasons why prospective patients should be screened before attending an EBP group, including to:

- Determine participant's suitability and appropriateness for group
- Assess participant's interpersonal skills
- Determine participant's goals and expectations for group
- Educate and orient group members to rules, roles, and norms
- Establish (or increase) rapport and support motivation for treatment
- Provide an opportunity for participants to ask questions about the group
- Respond to concerns and address barriers to attendance

Note: Not all EBP groups will require pre-group screening. Check your clinic's policy to determine what groups require screening.

The screening and orientation process involves two steps: 1) Records review and 2) Group screen interview/discussion with the prospective group participant (patient) about the group. The discussion may happen in person or over the phone.

Step 1: Conduct a Records Review

This should occur before having a discussion with the prospective group member.

1. Check the referral source. Is the referring provider within the clinic?
 - a. Does the patient have an intake in AHLTA/GENESIS and all required forms completed (limits of confidentiality and privacy act)?
2. Check diagnosis. Does the patient have a diagnosis compatible with the group criteria?
3. Review outcome measure scores. Confirm that the patient is currently symptomatic for the condition if outcome measures are recorded in the patient's record.
4. Review indicators of risk level. Current SI/HI, domestic violence, psychosis, severe substance use disorder, psychiatric hospitalizations, problems with aggression.
5. Review treatment history. Look for the following items:
 - a. Has the patient participated in any groups in the past?
 - b. Has the patient dropped out of similar EBPs?
 - c. Does the patient have a history of non-compliance?
 - d. Is the patient currently taking benzodiazepines? (Not recommended for trauma processing therapy)

Step 2: Conduct a Group Screen Interview

Using the Pre-group Screening Form, conduct an interview. Note that the interview not only entails completing the form, but also serves as an opportunity to orient the patient to the group. The person doing the screening should:

1. Complete the different sections of the Pre-group Screening Form:
 - a. Review the patient's reasons for wanting to attend the group. You will want to get a sense of the following things:
 - i. Why does this individual want to join the group?
 - ii. How ready does the individual seem to be able to look at himself/herself and consider making changes?
 - iii. What does the individual hope to get from the group?
 - iv. Will this group help the individual achieve these goals?
 - v. Are there any indications that a group would be counterproductive for this individual?
 - b. Obtain the following information from the patient:
 - i. Ask the patient if the format and goals of the group seem acceptable and relevant to them
 - ii. Ask the patient to rate on a scale of 0 to 10 (10 being the highest) how motivated they are to get help for this condition
 - iii. Ask the patient to rate on a scale of 0 to 10 (10 being the highest) their level of motivation to attend the group therapy
 - c. Review therapy history, noting whether they have tried this type of treatment before and whether they have a history of dropping out of treatment early
 - d. Review informed consent for the therapy, ensuring the patient understands the number of sessions required and location and times of the group. Also review the content and format for the group (see below for more information on this point)
 - e. Administer and score any outcome measures required by the EBP group if screening is done face-to-face, not via phone.
 - f. Review inclusion and exclusion criteria for the group again after talking with the patient
 - g. Summarize the inclusion and exclusion factors and circle whether you recommend that they attend the group or not
2. Provide education about the group. Make sure that the patient understands the purpose and nature of the group.
 - a. Explain the difference between process and EBP groups. The following script may be helpful for setting a correct expectation about an EBP group:

"This is more of a class or workshop, where the focus is on learning new skills for managing emotions. It is not an appropriate place for sharing the events of the week or having long discussions about personal issues." This can be a selling point to decrease resistance for referral due to fears of having to disclose too much.

- b. Explain the specific content covered in this group:
 - i. Getting buy-in for the group is best handled before the first session, as this can frustrate some participants if one or more members ties up the first session with requests to hear how the content is relevant to them
 - c. Share the following information or materials with the patient:
 - ii. Create a synopsis of the content covered in the group. The group brochure should be enough for this information, with the Technician expanding upon it
 - iii. Review times, dates, and the number of sessions for the group
3. Confirm individual's willingness to commit to:
- a. Attending all of the sessions, making note of any periods that the patient knows they will miss (TDY dates, vacation, etc.)
 - b. Sharing information in session (contributing to discussions, giving examples of thinking styles, etc.)
 - c. Completing homework assignments (make specific for each group; e.g., CBT for anxiety will have ABC sheets and exposure homework)
 - d. Completing assessment measures every 1-2 group sessions
4. Cover the ground rules/norms for the Group. Refer to the handout on What to Expect from your Group.
- a. Confidentiality and limits of confidentiality
 - b. Attendance policy/expectations
 - c. Punctuality
 - d. Commitment to entire series of sessions
 - e. Homework assignments
 - f. Alcohol or drug use
 - g. Cell phones
 - h. Leaving group while in session
 - i. Co-facilitator(s)
 - j. Termination
 - k. Documentation