Team huddle checklist

*Use this modifiable checklist to lead your team through efficient, effective huddles at the beginning of the clinic day or session.*

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|  Date: |  Start time: |
|  Huddle leader:  |
|  Team members in attendance:  |
|  Check in with the team  |
|  |  How is everyone doing?  |
|  |  Are there any anticipated staffing issues for the day? |
|  |  Is anyone on the team out / planning to leave early / have upcoming vacation? |
|  Huddle agenda |
|  |  Review today’s schedule  |
|  |  Identify scheduling opportunities* Same-day appointment capacity
* Urgent care visits requested
* Recent cancellations
* Recent hospital discharge follow-ups
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|  |  Determine any special patient needs for clinic day* Patients who are having a procedure done and need special exam room setup
* Patients who may require a health educator, social work or behavioral health visit while at the practice
* Patients who are returning after diagnostic work or other referral(s)
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|  |  Identify patients who need care outside of a scheduled visit |
|  |  Determine patient needs and follow up* Patients recently discharged from the hospital who require follow up
* Patients who are overdue for chronic or preventive care
* Patients who recently missed an appointment and need to be rescheduled
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|  |  Share a shout-out and/or patient compliment |
|  |  Share important reminders about practice changes, policy implementation or downtimes for the day |
|  |  End on a positive, team-oriented note* Thank everyone for being present at the huddle
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|  |  Huddle end time:  |

*Source: AMA. Practice transformation series: implementing a daily team huddle. 2015.*