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 | |
|  | 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) | |
|  | 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 | |
|  | 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 | |
|  | Huddle end time: | |

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