

TEAM HUDDLE CHECKLIST

Use this modifiable checklist to lead your team through efficient, effective huddles at the beginning of the clinic day or beginning of morning and afternoon sessions.

How to huddle

1. Choose a consistent time to meet so the "huddle time" becomes routine. Morning huddles work well for most practices, while some prefer after lunch or at the end of the day.
2. Limit huddles to seven minutes or less and have everyone stand the entire time to keep it short/focused.
3. Hold the huddle in a central convenient location, like a hallway.
4. For larger practices, try out different participants to find the most inclusive mix of representatives. Get physician buy-in, and huddle even if all physicians can't make it as long as the team has their support.
5. Choose a huddle leader and follow a structured agenda which you've modified to work for your team. Soon, the huddle will run itself!

Check in with the team

- ☐ How is everyone doing?
- ☐ Are there any anticipated staffing issues for the day?
- ☐ Is anyone on the team away / planning to leave early / have upcoming vacation?
- ☐ What went well yesterday?
- ☐ What could we improve upon today?

Huddle Agenda: Identify

- ☐ Scheduling opportunities
- ☐ Same-day appointment capacity
- ☐ Urgent care visits requested
- ☐ Recent cancellations
- ☐ Recent hospital discharge follow-ups

Review who is on the schedule and determine any special patient needs for the clinic day

- ☐ Patients who are having a procedure done and need special exam room setup
- ☐ Patients who may require additional team support while at the practice
- ☐ Patients who are returning after diagnostic work or other referral(s)
- ☐ Patients who have experienced something the team should know (i.e. death in the family, birth, etc.)
- ☐ Patients who have screening/preventative care needs?

Identify patients who need care outside of a scheduled visit

(i.e. prescription renewal, referral f/u, etc.)

- ☐ 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

References:

Huddles: Institute for Healthcare Improvement

<http://www.ihl.org/resources/Pages/Tools/Huddles.aspx>

Benefits of Huddle Implementation in the Family Medicine Center

<https://fammedarchives.blob.core.windows.net/imagesandpdfs/pdfs/FamilyMedicineVol45Issue7Picciano501.pdf>

Huddles: Improve Office Efficiency in Mere Minutes

<https://www.aafp.org/fpm/2007/0600/p27.html>