**Team huddle checklist**

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

|  |  |  |
| --- | --- | --- |
| 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 or 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: |