

## 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 <ul style="list-style-type: none"> <li>• Same-day appointment capacity</li> <li>• Urgent care visits requested</li> <li>• Recent cancellations</li> <li>• Recent hospital discharge follow-ups</li> </ul>
	Determine any special patient needs for clinic day <ul style="list-style-type: none"> <li>• Patients who are having a procedure done and need special exam room setup</li> <li>• Patients who may require a health educator, social work or behavioral health visit while at the practice</li> <li>• Patients who are returning after diagnostic work or other referral(s)</li> </ul>
	Identify patients who need care outside of a scheduled visit
	Determine patient needs and follow up <ul style="list-style-type: none"> <li>• Patients recently discharged from the hospital who require follow up</li> <li>• Patients who are overdue for chronic or preventive care</li> <li>• Patients who recently missed an appointment and need to be rescheduled</li> </ul>
	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 <ul style="list-style-type: none"> <li>• Thank everyone for being present at the huddle</li> </ul>
	Huddle end time:

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