

## Huddle / Care Team Meeting

### Meeting Agenda/Checklist

Today's game plan / potential problems & solutions / opportunities

|  |   |
|--|---|
| <b>Set up</b>  |   |
|  | Meeting location  |
| <b>Prep</b>  |   |
|  | Everyone ready / started on time  |
|  | Schedules printed and ready   |
|  | Nurse reviewed chart prior to the huddle using pre-visit planning tool  |
|  | Hospital, ER, or other outside records obtained (consults, pap, vaccine, etc.)  |
| <b>Check in with team members</b>                                |   |
|  | How's everyone doing? Anyone not okay?  |
|  | Issues for the day?   |
|  | Is anyone on the team out / planning to leave early / upcoming vacation   |
| <b>Review of yesterday</b> (optional—consider end of day huddle) |   |
|  | Celebrate from yesterday  |
|  | Problems from yesterday   |
| <b>Review of the schedule</b>                                    |   |
|  | What patients are NOT confirmed   |
|  | Check for openings that can be filled. Any special instructions for scheduler?  |
|  | Check for late or chronic no-show patients. Any special instructions for scheduler?   |
|  | Openings for today? Any special instructions for scheduler?   |
|  | Scheduling conflicts?   |
|  | Problem areas?  |
| <b>Review of Patient flow</b>                                    |   |
|  | Identify back to back long appointments (WCC, PHY, NP)  |
|  | Identify the following patients <ul style="list-style-type: none"> <li>patients requiring more time due to language, age, personality, or age</li> <li>new patients</li> <li>chronic disease patients</li> <li>patients who have been in ER or hospitalized</li> <li>patients for whom the provider will need assistance</li> <li>outstanding balances</li> </ul> |
|  | Nurse reviews patient agendas (care needs) <ul style="list-style-type: none"> <li>Labs, referrals, vaccines, preventive care needed, outside records</li> <li>All hospitalized patients or recent discharges</li> </ul>   |
|  | Documents for faxing, mailing, etc. are handed to clerical associate  |
|  | Equipment or supply needs   |
| <b>Weekly topic of special focus</b>                             |   |
|  | e.g. patient portal, standard of behavior, eCW tip  |
| <b>Wrap Up</b>   |   |
|  | Review of action items  |
|  | Did huddle start and stop on time?  |
|  | Minutes maintained and sent to team members   |