

Sample Huddle Action Checklist

"This will turn a day that is mediocre into a very successful day!"

Review charts the day before the huddle when possible or 20 minutes prior to the team huddle.

Keep a huddle check list and calendar where you meet for team huddle.

- 1. Begins approximately 10 -1 5 minutes prior to first patient**
 - a. Begin and end on time
 - b. Team is paid for being there early for this short meeting
 - c. Use a calendar for each team member to sign up to lead the team huddle. Doctor also needs to be included as a leader of this short meeting. This team member begins the meeting on time, leads the flow of meeting and makes certain it ends on time.
 - d. Place a note at the front desk so patients understand why no one is there in the front office to greet them
 - e. Turn the phone over to a virtual answering assistant so that you have a live person answering your phone while in the team huddle
- 2. Every member of the team needs to participate**
 - a. The meeting needs to be held in a room which is private and away from patient ears
 - b. Bring a schedule for the day with you and a calendar if you think you may need it. Plan to be proactive
 - c. Bring a pen and highlighter. Be ready to write down notes
 - d. This is not a time to thumb through charts so please leave this out of the huddle
 - e. Stand up during the meeting
 - f. This increases the energy especially if you aren't a morning person.
- 3. Begin by reciting the practice mission statement**
- 4. Each team member will be speaking in a round robin format to express their needs and be proactive.**
 - a. Be short and concise with your report
 - b. Keep your report short and pertaining to what the others need to hear about
 - c. Team members express the needs for their patients which need collaboration
- 5. Each team member should find something positive that went well the previous day of work and let others know about this**
- 6. Be proactive and state pitfalls you see for the day or any that have occurred the previous day**
- 7. Focus your report to Coordinate team efforts for the day**

- a. Pre-med patients and confirming this is completed prior to time of appointment
 - b. Special needs patients and any assistance required
 - c. Discuss patient personalities when necessary. For example if there is a new team member or a temporary employee not familiar with a patient who usually has a special request or situation now is the time to discuss
 - d. Discuss and coordinate x-rays. FMX: who can administer. Other examples are updating medical histories at time patient checks in, exams, period charting, etc.
- 8. State production goals for the month and year.**
 - 9. Report amount of cancellations and no shows for the month**
 - 10. Report any days which the office will be closed for a vacation or holiday that month when necessary**
 - 11. Report Emergency times available**
 - 12. Report on when the next monthly meeting will be held, the topic of discussion and who is leading that meeting**
 - 13. End the meeting with something positive.** It is recommended that you have the leader of the meeting close with one of your statements from the practice code of ethics you have written