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 -15 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