SAMPLE MORNING TEAM HUDDLE

PURPOSE: TO CREATE YOUR DREAM DAY. A COHESIVE TEAM WITH A COLLABORATIVE EFFORT CREATING A PATIENT CENTERED DAY THAT **EFFICIENT** AND STRESS FREE.

TIME: 10 – 15 MINUTES

LOCATION: Always meet in a private part away from the front desk. It is best if you can close the door as you are discussing private patient information.

WHAT TO BRING:

- Pen and highlighter
- No charts
- Day sheet
- Routing slip

ROLES:

Each person on the team, including doctor will sign up to lead the team meeting and even each monthly meeting. Each day will be a different team member leading the meeting.

BENEFITS OF THE HUDDLE:

- Directs team members from each department to report on specific item which will impact other
- Provides for team collaboration
- Prepares the team
- Time management tool

COORDINATION OF THE HUDDLE:

- Post a calendar in the team break room for team members to sign up to lead the team meeting
- Post a copy of this huddle protocol in the break room and laminate it to protect it
- Have the practice mission statement and practice principles posted here and laminated
- The leader for the day's team huddle will follow this checklist and direct each department in making their report

BEGIN THE MEETING:

20 minutes prior to the time the first patient is to be seated. This will allow you to have your first patient seated on time.

Leave a note at the front desk: "Welcome to our office today. We are currently in our morning team meeting. Please have a seat and help yourself to coffee or water. We are meeting to ensure you receive the very highest level of care during your treatment today. We will be seating you in a few minutes. Thank you for your understanding."

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SCHEDULE COORDINATOR

- 1. Distribute day sheets prior to the team meeting
- 2. Anticipated production for today
- 3. Review the day
- 4. New patients / communicate their referral source
- 5. Emergencies- what and when and where to schedule.
- 6. Communicate any special needs of patients for today
- 7. Next available production block
- 8. Next new patient exam pre-block time
- Next available hygiene appointment(s) and scaling and root planing appointments
- 10. Discuss thank you cards to be sent, birthday cards to be sent and invite team to sign.
- 11. "I will ask ______ for a referral today."

FINANCIAL COORDINATOR

- 1. Results of previous day's payment arrangements
- 2. Anticipated payment arrangements, consultations, etc.
- 3. Coordinate support with team for collecting Patient balances, problem accounts, etc.
- 4. Provide a weekly report of month-to-date collections
- 5. coordinate administrative meeting with doctor to prepare for consults
- 6. "I will ask ______ for a referral today."

HYGIENIST(s)

- 1. Prior to team huddle, audit all charts for x-rays (fmx), perio exams
- 2. Provide an overview of patients for today
- 3. Discuss exams and coordinate with doctor and assistant for timing
- 4. Coordinate support from dental assistants (who will assist with perio charting, etc.)
- 5. Coordinate other assistance: impressions, oral hygiene instructions, sealants, etc.
- 6. Discuss incomplete treatment plans (dentistry), intra-oral camera
- 7. New patients
- 8. Discuss results from the previous day's post op calls
- 9. Highlight overdue family member(s) continuing care from routing slips
- 10. Coordinate assistance with any special needs patients, pre-med needed and ask for confirmation
- 11. "I will ask ______ for a referral today."

DOCTOR AND ASSISTANTS

- 1. Audit patient charts prior to team huddle
- 2. Provide an overview of patients for today
- 3. Discuss special needs patients and new patients,
- 4. Emergencies discuss possible treatment
- 5. Coordinate support needed (front desk coverage, post op instructions, etc.)
- 6. Confirm lab cases,
- 7. Discuss any possible treatment rooms challenges, anesthesia to use, etc.
- 8. Coordinate support with x-rays, telephone coverage, etc.
- 9. Communicate results from post-op calls
- 10. Patient photos to be taken today
- 11. Highlight overdue continuing care, patient and family members. Check this on the routing slip
- 12. Review patient treatment plan and discuss any unscheduled dentistry
- 13. Identify one patient for same day treatment or overdue exam, etc.
- 14. "I will ask ______ for a referral today."

END THE MEETING:

- The meeting should end approximately 5 minutes before the first patient is to be seated.
- Try to end with a positive comment
- End with stating one of your practice principals. (Code of ethics). Each day one of the ten practice principals should be read aloud.
- Now, make it a great day!