

HARVEST DAILY HUDDLE CHECKLIST

Date:		Start time:
Huddle leader:		
Team members in attendance:		
Check in with the team:		
Leader	How is everyone doing?	
Team Leader Clinical Site Manager	Are there any anticipated staffing issues for the day?	
Team Leader Clinical Site Manager	Is anyone on the team out / planning to leave early / have upcoming vacation?	
Huddle agenda:		
	Review today's schedule	
Front Office Associate	<p>Identify Scheduling Opportunities</p> <ul style="list-style-type: none"> • Total Number of Patients: _____ • Hospital discharge follow ups: _____ • ER follow-ups: _____ • Medicare AWW/IPPE: _____ • Provider: New Patient: _____ • PE/WCC: _____ • Same-day appointment capacity: _____ Times: _____, _____, _____, _____ • Double books: _____ Times: _____, _____, _____, _____, _____ • Bus Transportation: _____ 	

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Nurse Case Manager Pharmacy Rep Eligibility Specialist Spanish Interpreter	Determine any special patient needs for clinic day <ul style="list-style-type: none"> Patients who are having a procedure done and need special exam room setup: _____ Glucometer downloads: _____ Hearing impaired interpreter needs: _____ Times: _____, _____, _____, _____ Spanish interpreter needs: _____ Times: _____, _____, _____, _____, _____
Referral Specialist	Pending/Ordered Filter Updates.
Care Coordinator	Determine patient needs and follow ups <ul style="list-style-type: none"> Patients recently discharged from the hospital who require follow-up: _____ Patients recently visited the ER who require follow-up: _____ Patients who recently missed an appointment and need to be rescheduled: _____ Integrated Behavioral Health visit: _____ EKG: _____ Foot Exam: _____ Pap Smears: _____
Everyone	Share a shout out and/or patient compliment.
Clinical Site Manager	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"> Thought for the day. Thank everyone for being present at the huddle. 	
Huddle end time:	