

# PURPLE TEAM DAILY HUDDLE CHECKLIST

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

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