

YELLOW TEAM 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	Identify Scheduling Opportunities - Total Number of Patients: _____ - Hospital discharge follow ups: _____ - ER follow-ups: _____ - Medicare AWV/IPPE: _____ - Provider: New Patient: _____ - PE/WCC: _____ - Same-day appointment capacity: _____ Times: _____, _____, _____, _____ - Double books: _____ Times: _____, _____, _____, _____, _____ - Bus Transportation: _____	

YELLOW TEAM DAILY HUDDLE CHECKLIST

Nurse Case Manager Pharmacy Rep Eligibility Specialist Spanish Interpreter	Determine any special patient needs for clinic day • 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 • 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: • Thought for the day. • Thank everyone for being present at the huddle.	
Huddle end time:	