Huddle / Care Team Meeting

Meeting Agenda/Checklist

April 18, 2013

Today's game plan / potential problems & solutions / opportunities

Set up	
	Meeting location
Prep	
	Everyone ready / started on time
	Schedules printed and ready
	Nurse reviewed chart prior to the huddle using pre-visit planning tool
	Hospital, ER, or other outside records obtained (consults, pap, vaccine, etc)
Check in with team members	
	How's everyone doing? Anyone not okay?
	Issues for the day?
	Is anyone on the team out / planning to leave early / upcoming vacation
Review of yesterday (optional—consider end of day huddle)	
	Celebrate from yesterday
	Problems from yesterday
Review of the schedule	
	What patients are NOT confirmed
	Check for openings that can be filled. Any special instructions for scheduler?
	Check for late or chronic no show patients. Any special instructions for scheduler?
	Openings for today? Any special instructions for scheduler?
	Scheduling conflicts?
	Problem areas?
Review of Patient flow	
	Identify back to back long appointments (WCC, PHY, NP)

	Identify the following patients
	    patients requiring more time due to language, age, personality, or age
	    new patients
	    chronic disease patients
	    patients who have been in ER or hospitalized
	    patients for whom the provider will need assistance
	    outstanding balances

	Nurse reviews patient agendas (care needs)
	    Labs, referrals, vaccines, preventive care needed, outside records
	    All hospitalized patients or recent discharges

	Documents for faxing, mailing, etc. are handed to clerical associate
	Equipment or supply needs
Weekly topic of special focus	
	e.g. patient portal, standard of behavior, eCW tip
Wrap Up	
	Review of action items
	Did huddle start and stop on time?
	Minutes maintained and sent to team members