

APPENDIX A - Team Huddles, How To and Tips

How to get started:

Decide on where to hold the team huddle in a central place without disruptions

Stand up meeting - this helps keep the meeting short so you can get back to seeing patients

Designate a Huddle Champion/ Leader and put together a structure agenda (See below on Huddle agenda) with the view of the huddle running itself.

7 minutes or less a minimum of once daily:

If you work a Full Day - At the start and after lunch

If you work a ½ day - At the start and at the end of the day

Include all members of the Primary Care Team

Ensure one of you has the Schedule for the time frame at hand

Huddles as a standing team meeting agenda item - discuss what worked and what was good that could be even better!

Huddle Agenda:

-Check team schedules. **Who is here today?**

-Troubleshoot the patients on the schedule, review the following:

1) **Review Appointment Types and Reasons**

-Check for patients on the schedule that may require more time and assistance due to age, disability, and personality or language barriers. Who can help?

-Check for lengthy appointments such as physicals. How can the team function to ensure appointment runs on time?

-Ask whether lab test results, hospital discharge summary and consultations are ready in the patient chart. Who can help track these down prior to the visit?

-What will be the most efficient path of patient flow?

-Plan for Patient who has special needs. Place patient in a specific room (bariatric or treatment room)

-Requires Specific equipment or extra time needed

-Chaperone needed for appointment, [Refer to PCOG7 Chaperones during Intimate Physical Examination](#)

2) **Let your Team know what to do with any open or unfilled slots**

-Check for openings that can be filled or chronic no-shows that can be anticipated. Any special instructions for the scheduler (call reminder)?

-Delegate:

-When a team member has a question they can research ...ask them to bring the answer back to the team and share at the next team huddle or clinic team meeting.

-Ask the team to be on the look-out for things you are doing that they could take off your plate and complete instead.

-Any time they see something they could do instead that would help the team be more effective (could be done differently or by someone else on the team), invite them to bring that idea to the next huddle and explore with the team (Right Work Right Provider and Reduce the Backpack concepts as described in Advanced Access).