

Tiered Huddles

Huddle Assessment Form

This form will help you evaluate how huddles are going in your practice. Use your findings as constructive feedback and discuss with huddle leaders and participants. You may also identify possible ways to improve the huddle (e.g., checklist updates, start time changes or using a timekeeper to keep the huddle on track).

Use this modifiable checklist to make sure the essential elements of the huddle checklist have been completed. For the best results, observe three to five huddles and provide feedback based on the patterns from multiple observations.

Date:
Observer:
Huddle leader:
Team members in attendance:
<input type="checkbox"/> Check in with the team <ul style="list-style-type: none"> <input type="checkbox"/> Staffing issues or outages are addressed <input type="checkbox"/> Physician/provider outages that require rescheduling patients are addressed
<input type="checkbox"/> Review today's schedule <ul style="list-style-type: none"> <input type="checkbox"/> Identify scheduling opportunities <input type="checkbox"/> The team is made aware of the same-day scheduling capacity <input type="checkbox"/> The team is going to address urgent care requests and follow-ups for recently discharged patients
<input type="checkbox"/> Determine special patient needs for clinic day <ul style="list-style-type: none"> <input type="checkbox"/> Someone on the team takes ownership for special patient needs <input type="checkbox"/> Recommended referrals to the health educator, social worker, behavioral health, etc. are made
<input type="checkbox"/> Identify patients who need care outside of a scheduled visit <ul style="list-style-type: none"> <input type="checkbox"/> Patients are identified and someone takes ownership for following up with them
<input type="checkbox"/> The huddle leader reviewed the entire huddle agenda <input type="checkbox"/> As appropriate, the huddle leader reviewed the following items: <ul style="list-style-type: none"> <input type="checkbox"/> A shout-out and/or patient compliment <input type="checkbox"/> Important reminders or announcements about the practice
Huddle end time:
<input type="checkbox"/> The huddle ended on a positive note <input type="checkbox"/> The team members were engaged in the huddle and participated appropriately. Please describe below.
Notes for huddle leader:
Suggestions for huddle improvement: