

## Team Huddles Guide

This team huddles guide is focused on finding strategies for quickly planning and re-planning the day's activities to maximize communication and coordination. Every clinic has a schedule for the day, but it's often rare that the schedule goes as planned. Huddles help teams to be more proactive, efficient and patient-centered. They can be performed daily, weekly or as needed. You may wish to run a PDSA (Plan, Do Study, Act) cycle with your team to determine the best huddle frequency and approach.

### Huddles are typically:

- Brief (<10 minutes long)
- Planned for first thing in the morning (NOTE: some clinics choose to huddle again after lunch)
- Focused (everyone knows the purpose of the huddle ahead of time)
- Done while standing (at an EMR, if applicable)
- Standardized (same time and place) every day, and/or
- Scheduled 'as needed' (e.g. PDSA update, review of critical incident or event, etc.)
- Inclusive – every team member present is encouraged to actively participate

### Examples of huddle topics:

- Team check-in – who is here/not here today? Special concerns or acknowledgements, etc.
- Which patients are booked today? Any cancellations?
- What can be prepared ahead of time and by whom? (e.g., pull in results from Netcare, set up for pap, etc.)
- Is there any important information the whole team should know? (e.g. patient is grieving)
- Contingency planning to manage the day when a team member is off sick or on vacation
- What can be done opportunistically? For example:
  - 'Screening appointment' coming up (provide with requisitions in advance)
  - Patient is due or overdue for preventive screening (no screening appointment booked)
  - Prescription renewal coming up – consider taking care of today
  - Care plan needs follow-up
  - An appointment with a team member would be helpful (e.g. pharmacist for a med reconciliation) – engage and book

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## Huddle Checklist

This sample checklist can be adapted to suit the specific needs of your clinic.

<b>MORNING HUDDLE (before 1<sup>st</sup> patient of the day)</b>	
Team Check-in	Notes
How is everyone feeling today?	
Are there any external team members here today? <i>(e.g. PCN team, residents, etc.)</i>	
Is anyone away? How will we manage that?	
Is anyone leaving early? How will we manage that?	
Is there anything else we should know today?	
<i>Other clinic-specific items</i>	
<b>Schedule Review</b>	
Who is coming in today? Cancellations? Squeeze-ins?	
Is there anything that the team should know about? <i>(e.g., patient grieving, will be receiving a difficult diagnosis, often late or no shows, etc.)</i>	
Can we offer opportunistic care while they're here? <i>(e.g., screening due, requisitions, prescription renewal, care plan update, etc.)</i>	
Can we get anything ready in advance? <i>(e.g., Netcare results, print requisitions, administer screen/self-assessment, pap prep, etc.)</i>	
Are we doing any PDSAs today? What's the plan?	
<i>Other clinic-specific items</i>	
<b>AFTERNOON HUDDLE (before 1st patient of the afternoon) --- OPTIONAL</b>	
Any change in team status? <i>(e.g. leaving early, gone home sick, etc.)</i>	
Any change in the schedule? <i>(e.g. running late, new cancellations, squeeze-ins, etc.)</i>	
Does anyone need help?	
PDSA update <i>(if applicable)</i>	
<i>Other clinic-specific items</i>	
<b>END OF DAY HUDDLE --- OPTIONAL</b>	
Brief review of incident(s)	
What went well?	
What could we have handled differently?	
Actions required?	
<i>Other clinic-specific items</i>	