**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

# Huddle Checklist

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

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