

TEAM HUDDLES



This 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 rare that the schedule goes as planned! Huddles help teams to be more efficient and patient-centered. Huddles can be done daily, weekly or as needed. Suggest a huddle PDSA with your team to determine best frequency.

Huddles are Typically:

- Brief (<15 minutes long)
- Focused – ensure everyone knows the purpose of the huddle ahead of time
- Done while standing (at an EMR, if applicable)
- At a standard time and place and/or
- As needed (e.g. PDSA, check-in)
- Inclusive – every team member present can speak up

Huddle Topics

- Who is coming in 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? E.g.
 - Patient needs but has never had a care planning appointment (first time 'engagement')
 - Care plan needs follow-up
 - Prescription renewal coming up (avoid another appointment)
 - Screening appointment coming up (provide with requisitions in advance)
 - An appointment with a team member would be helpful (e.g. pharmacist for a med reconciliation) – engage and book

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? <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?	
Schedule Review	
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 diagnosis, often late or no shows, etc)</i>	
Can we offer opportunistic care while they're here? <i>(e.g., care plan update, screening due, requisitions, prescription renewal, 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 PDSA's today? What's the plan?	
AFTERNOON HUDDLE (before 1st patient of the afternoon)	
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>	

END OF DAY HUDDLE (OPTIONAL)	
Brief review of incident(s)	
What went well?	
What could we have handled differently?	
Actions required?	

Huddle Checklist

Some teams have found it beneficial to use a checklist for their huddles. See a sample checklist below.