

# 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

<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?	
<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 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?	
<b>AFTERNOON HUDDLE (before 1<sup>st</sup> patient of the afternoon)</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>	

<b>END OF DAY HUDDLE (OPTIONAL)</b>	
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.