Huddle Evaluation 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).*

*Instructions: Use this modifiable checklist to make sure that the essential elements of the huddle checklist have been completed. For the best results, observe 3 to 5 huddles and provide feedback based on the patterns from multiple observations.*

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| --- | --- |
|  Date: |  Start time: 🞏 Start on time |
|  Observer: |  Role: |
|  Huddle leader:  |
|  Team members in attendance: |
|  🞏 Check in with the team * Staffing issues or outages are addressed
* Physician/provider outages that require rescheduling patients are addressed
 |
|  🞏 Review today’s schedule* Identify scheduling opportunities
* The team is made aware of the same-day scheduling capacity
* The team is going to address urgent care requests and follow-ups for recently discharged patients
* Determine special patient needs for clinic day
* Someone on the team takes ownership for special patient needs
* Recommended referrals to the health educator, social worker, behavioral health, etc. are made
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|  🞏 Identify patients who need care outside of a scheduled visit * Patients are identified and someone takes ownership for following up with them
 |
|  🞏 The huddle leader reviewed the entire huddle agenda 🞏 As appropriate, the huddle leader reviewed the following items:* A shout-out and/or patient compliment
* Important reminders or announcements about the practice
 |
|  Huddle end time: 🞏 End on time |
| * The huddle ended on a positive note
 |
| * The team members were engaged in the huddle and participated appropriately. Please describe below.
 |
|  Notes for huddle leader: |
|  Suggestions for huddle improvement: |

*Source: AMA. Practice transformation series: implementing a daily team huddles. 2015.*