

## Huddle Protocol – West County Health Centers, Inc.

### Protocol Summary:

The Care Team MA is responsible for leading the 15 minute pre-shift huddle with the Care Team Front Office member, Provider, and Care Team RN.

The huddle is an opportunity for team members to communicate items gleaned from robust calls, chart prep and coordinate the visit for the scheduled patients. It is important that the team values each member of the team and considers each member's unique role. Real-time collaboration about the needs of the patient and a more proactive approach will improve with care coordination, improve patient experience, improve office efficiency and improve clinical outcomes.

Each member should be prepared for the meeting and the provider should have the tablet or computer open to review items and order care items as appropriate. The dynamic of the meeting will be different if it is lead by the provider; it is the role of the MA to facilitate the meeting and the team to set the tone of team collaboration

### Role Responsibilities

#### Care Team MA:

- Look for Outstanding and Future labs, outstanding DI and open referrals for review (remind the patient to complete or file as test not performed)
- Look through the patient's alerts with the provider to anticipate if the patient is due for any lab, study or immunization Note if a PM 160 is required for this visit
- Have the Immunization Routing slip from CAIR available for all children 5 and under as well as any WCE, Sports PEs or Immunization Update appts
- Find out if any tests or special vitals can be done before the provider sees the patient (see Vitals and Lab Ordering Protocol)
- Anticipate the special supplies you will need to complete each patient visit
- For complex patients, see if provider would like you to check in or notify when next patient is ready.
- Before your shift begins, print out a schedule of the shift. 15 min for huddle.

#### During the huddle:

- Discuss patient personalities (ex. anxious, angry or potentially violent patients)
- Find out if an interpreter is needed and who will be available to assist
- Support each other
- Review each item listed below with each patient.
- Take notes on your printed schedule.

#### Care Team Front Office

- Discuss insurance status for the visit and potential change based on items from the huddle.

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- Develop a plan should a patient cancel or the schedule changes
- Review items gleaned from the robust call including: detailed purpose of the visit, other items identified by the patient, recent ER/hospital visits/consultant visits, needed paperwork, etc.

### Care Team Nurse

- Add specific insight for patients on the schedule – education needs, insights from care management, needed items that could be completed in the exam
- Care Team to determine if warm hand-off or other opportunities available during the visit
- 5 minute check-in at the end of the huddle between RN and Provider about plan for RN day, other items.
- Review RN visits scheduled for the day.

### Provider

- Should open the visit for each patient and add orders, notes as needed during the huddle.
- Assist in creating tone of collaboration and facilitate participation by all staff.

<b>Effective Date:</b>	<b>Revision Date:</b>
<b>Supervisor Approval:</b>  <i>Initial</i>	<b>Medical Director Approval: __JLC</b> <b>4/12_____</b>  <i>Initial</i>