San Luis Valley Health - Daily Team Huddles: Roles and Overview

	Primary CMA/Clinical Staff-Leads Huddles	Medical Provider	Care Coordinator/Case Manager	BH Provider	Admin/Scheduling
Preparation before huddles	• Review scheduled patients • Scrub Charts-tool • Overdue Health Maintenance items • Standing orders that can be performed including immunizations • Updates to outstanding referrals/orders • Patients coming in who have not followed through on referrals or who need navigation	• Specialist/hospitalist communication on patients coming in • Test results • Note complex care needs • Note needs for care plans • Note BH patient needs • Note agenda-setting plan • Review orders done in advance of visit	• List of patient d/c from hosp/ed/transitions of care • List of patients in hospital/ED since last huddle • High risk patients coming in • List of patients needing care plans.	• List of patients not screened within past year • List of high-risk patients for BH needs • List of additional patients for review (chart review, past referrals, etc)	• Anyone scheduled today AND in the future? • Schedule, availability, open slots • Who needs annual well visits/questionnaires/consent • Front desk staff availability/plan • Simple outreach to be completed/visit planning • All patients scheduled from another pod?
Huddle Items to Review	• Ask for clarification on priorities (How much can we get done today?) • Proactively discuss likely issues with flow, lateness, or high service needs. • Space/Rooming issues • Staffing issues/Coverage • Clarify open orders to complete • Review of major patient requests (letters, forms, meds, orders) • Anyone coming in next day that is in need of pre-visit work (labs, imaging, etc)?	• Suggest any handoff needs/ancillary supports. • Proactively discuss likely issues with flow, lateness, or high service needs. • Anyone scheduled today AND in the future • Opportunities for add-ons/double booking • Anyone on tomorrow's schedule that can be taken care through phone call, care coordination, or another visit type? • Any "at a glance" scheduling changes for tomorrow? • Flow plan, agenda setting, time mgt	• Suggest any handoff needs or ancillary supports. • Review risking of patients. • Review of major patient requests (letters, forms, meds, orders). • Review of overlaps with other providers.	• Present patients identified through chart-scrub or past interactions/referrals • Suggest any handoff needs or ancillary supports. • Receive requests for high-risk patients identified. • Review of overlaps with other providers.	• Note openings in scheduled, opportunities for double-booking or fitting in acutes, scheduling opportunities.