



## The 10 Building Blocks of Primary Care

# Healthy Huddles Happen

### Background and Description

Huddles allow the team to meet briefly on a daily basis to discuss patients' needs and determine what tasks need to get done and by whom. Some practices huddle in the morning; best is two 5-8 minute huddles at the start of the morning session and the start of the afternoon session. The goal of the huddle is to rapidly review the charts of the patients on the day's schedule and make a list for each patient of missing information to retrieve prior to the visit and one or two care gaps to close while rooming the patient. A designated team member (usually the MA), in advance of the huddle, carefully "scrubs" the chart (or Healthcare Maintenance Screen of the Electronic Medical Record) of every patient and makes a complete list of missing information and all the care gaps that could be closed for each patient during their visit. Once this list for the day is complete, the provider joins the other team members for the huddle in which the action list for each patient is prioritized. The huddle itself should occur at the start of each day, and should take from 5-15 minutes.

### Instructions

This worksheet is a tool to introduce the idea of huddles and help your team discuss what they might get out of huddles and how to make the best use of this time. You might ask each working team of clinician, medical assistant or nurse, and front desk or other staff member to use this worksheet to discuss huddles. Alternatively, if your staff is very quiet, we have found it useful to break into teams by discipline, and then to ask medical assistants, front desk, clinicians, and other to each share what they discussed with the larger group.

### UCSF Center for Excellence in Primary Care

The Center for Excellence in Primary Care (CEPC) identifies, develops, tests, and disseminates promising innovations in primary care to improve the patient experience, enhance population health and health equity, reduce the cost of care, and restore joy and satisfaction in the practice of primary care.

### Acknowledgments

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# Healthy Huddles Happen!

We will spend \_\_\_\_\_ minutes huddling. We will huddle \_\_\_\_\_  
(before/after/during) (AM session, lunch, PM session)

