



## The 10 Building Blocks of Primary Care

# Healthy Huddle Warm Up Tool

### 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. 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 of 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 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 based on the information collected.

The Huddle Warm-Up tool can assist in collecting missing information and identifying care gaps to present in the huddle for discussion by the team.

### Instructions

This tool will assist with "scrubbing" charts. The name of the clinician, date, and team member completing the sheet is filled in at the top. For each patient, list the appointment time, an identifier, and fill in all relevant information for the patient. Bring the tool to the huddle to discuss each patient as a team.

### 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

The UCSF Center for Excellence in Primary Care would like to acknowledge the following individual for her contribution to this work: Amireh Ghorob, MPH

Copyright 2014, The Regents of the University of California  
Created by UCSF Center for Excellence in Primary Care.

All rights reserved. Individuals may photocopy these materials for educational, not-for-profit uses, provided that the contents are not altered and that attribution is given to the UCSF Center for Excellence in Primary Care. These materials may not be used for commercial purposes without the written permission of the Center for Excellence in Primary Care.



## Huddle Warm-Up

Scrub Report for: \_\_\_\_\_ Clinic Date: \_\_\_\_\_ Completed by: \_\_\_\_\_

Appt Time	Last Name/ Last 4 MR	New or F/U Last seen?	Confirmed Appt	Pre-Clinic Labs	Pertinent Lab Values	Screening/ Immunizations Needed	Health Coaching/ Patient Concerns/ Consults/Etc.	FOLLOW UP (Post Huddle or Appt )
		D New Patient D F/U last Seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:::		
		D New Patient D F/U last seen:	D Yes D No D Cancelled D Resched	D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		

Appt Time	Last Name/ Last 4 MR	New or F/U Last seen?	Confirmed Appt	Pre-Clinic Labs	Pertinent Lab Values	Screening/Immunizations Needed	Health Coaching /Patient Concerns / Consults / Etc.	FOLLOW UP (post Huddle)
		D New Patient D F/U last Seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP D Pneumovax D Influenza/H1N1 D Other: D CRC D Mammo D Pap		

Appt Time	Last Name/ Last 4 MR	New or F/U Last seen?	Confirmed Appt	Pre-Clinic Labs	Pertinent Lab Values	Screening/Immunizations Needed	Health Coaching /Patient Concerns / Consults / Etc.	FOLLOW UP (post Huddle)
		D New Patient D F/U last Seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		

Appt Time	Last Name/ Last 4 MR	New or F/U Last seen?	Confirmed Appt	Pre-Clinic Labs	Pertinent Lab Values	Screening/Immunizations Needed	Health Coaching /Patient Concerns / Consults / Etc.	FOLLOW UP (post Huddle)
		D New Patient D F/U last Seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		
		D New Patient D F/U last seen:		D Completed D Not Done D Pt called D N/A-no orders		D Td / TdaP      D CRC D Pneumovax      D Mammo D Influenza/H1N1      D Pap D Other:		