

Central City Concern Old Town Clinic Process and Procedure Document**#110.00 Process and Procedure – Team Huddles**

Original approval date: 9/28/2013

Most recent revision date: 1/11/2017

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Statement of Purpose

Managing patient care is a team effort that involves clinical and non clinical staff (e.g., providers, nurses, medical assistants, health assistants) interacting with patients and each other to provide quality clinical care. Excellent communication and coordination is a critical feature of successful patient centered care. A huddle is a team meeting to discuss patient care needs and visit flow for a given clinic session.

Administration and Oversight

Oversight of the processes defined within this document will be the responsibility of the Old Town Clinical Services Manager and Care Team Managers. The contents within this documented procedure will be reviewed and updated by the clinic's Quality Improvement Specialist in collaboration with the above staff as defined.

Procedure: Purpose of the Huddle Process, Frequency and Attendees

- 1) The purpose of the huddle process is for the team to gather together to assess the needs of the patients that have scheduled appointments for the upcoming day. By identifying gaps in care and needed immunizations, preventative tests and other medical services prior to the patient's appointment, the team maximizes the Provider's time spent with the patient during the visit. Regularly scheduled meeting times for huddles also provide an avenue for efficient intra-team communication.
- 2) Huddles are completed at the start of each provider shift.
- 3) All team huddles that occur ideally involve the following care team staff:
 1. Care Team Medical Assistants
 2. Care Team Providers
 3. Team's Care Team Manager
 4. Care Team's Health Assistant

Procedure: Staff Roles and Responsibilities :

- 1) **Medical assistants:** The role of the Medical Assistant during the Huddle process is as follows:

1. Identify needed Immunizations, preventive screenings, labs, and patient needs specific to chronic condition management. MAs are asked to review the CDC guidelines for immunization schedules as found on the clinic's internal homepage.
2. Document the above identified needs within the electronic medical record and meet with provider to define visit flow for that session.

2) **Providers:** The role of the Provider during the Huddle process is as follows:

1. Discuss with the patient during the visit the needed immunizations, preventive services and testing identified by the medical assistant
2. Discuss status of referrals and other assessments needed to manage the patient's care with the patient during the time of their visit

3) **Care Team Manager:** The role of the Care Team Manager during the Huddle process is as follows:

1. Oversee the huddle preparation process; arrange for cross-coverage for huddle process during times of staff shortages
2. Ensure that all needed documentation and preparation has been completed by care team staff the Care Team Manager supervises

4) **Health Assistants:** The role of the Health Assistant during the Huddle process is as follows:

1. Access outside records via portals as needed (recent specialty referrals, and or hospitalizations)
2. Prep documentation pertaining to outside records for the Care team and Provider prior to the patient's appointment