

Bedlam-L Huddle Checklist

Date:

**Huddle Checklist**

POINT OF CARE: The MS3/PCP reviews the appointment schedule for the session:

- For each patient on the schedule, identify the MS3/PCP agenda by review of CPOE from last visit(s)
- Review all documents received since last visit, eg lab, medical records and other results, and add to MS3/PCP agenda to review with patient
- Identify and order/arrange preventive services due
- Develop with nursing team the nursing agenda for each patient, including identification of any patients who require in-house lab upon arriving, eg A1C, UA, INR, targeted education needs, need for social services or other resources, phone call to no shows, and review of the visit summary at conclusion of visit.
- Identify and assign social work and/or PAP requirements
- Review med list to insure sufficient refills. Meds for chronic illness may be refilled X11

POPULATION HEALTH MANAGEMENT: The MS3/PCP reviews their patient panel report

- Identify the patient's which may benefit from interventions between visits
- Assign responsibility for interventions
- Document the interventions in the EMR
- Enter orders, as needed

POINT OF CARE: The MS3/PCP reviews their inbox: all inboxes must be completed before leaving each clinic session, and visit notes within 24 hours of visit

- Insure all results (lab, imaging, consults, etc) are reported to patient, options include letter, phone call, secure messaging
- Complete all inbox items, including Flags

POINT OF CARE: The MS3/PCP reviews the appointment schedule for next session

- Identify actions, such as lab tests or reminders, required prior to appointment and send flag to Room Scheduler to complete
- If lab required, enter the order

The following signatures confirm completion of the checklist:

_____	MS3
_____	MS3
_____	MS3
_____	MS3
_____	Nursing
_____	Nursing
_____	Nursing
_____	Nursing