

Practice Policy & Guidelines

Policy: Team Huddles and Meetings	Developed by:	Approved by:
Updated:	Signature:	Signature:

PURPOSE:

Communication among staff is organized to ensure that patient care is coordinated, safe and effective.

GOALS AND OBJECTIVES:

The practice has regular patient care team meetings or a structured communication process focused on individual patient care.

RESPONSIBILITY:

Clinical and clerical staff

DETAILS:

The practice will hold regularly scheduled meetings, huddles, and trainings. To ensure full attendance and maximize success of these gatherings, the practice will:

- Activate the answering service during all team huddles and staff meetings to assist with calls
- Block off an appropriate amount of time so that patients are not arriving during the all-staff meeting
- Address all staff questions, concerns, and suggestions

The following will also be implemented for all meetings, except daily team huddles:

- Have an agenda for each meeting
- Record meeting minutes; taking note of all action items
- Review minutes and action items from previous meeting

All relevant staff are required to attend these meetings as stated in the team meeting descriptions below.

Daily Team Huddle

At the beginning of each day clinical staff will meet to discuss the day's appointment schedule. During this time, patient care and coordination will be discussed. Attendees required to attend include, but are not limited to: providers, NP, RN, LPN, MA, coordinator, and triage. Any information pertinent to front office staff, such as insurance status of patients, will be shared with front office staff after the clinical team huddle concludes.

Clerical Staff Meetings

Every other week the clerical staff will meet for 30 minutes to discuss schedule template updates, provider contract updates, alert supervisors of issues, and ask questions.

Clinical Staff Meeting (clinicians other than physicians)

Clinical staff will meet every three months to review patient protocols and clinical issues. Once a month, nurses come in early for a breakfast club to teach staff about a topic, including how to perform certain procedures or duties. All handouts are kept for future employees.

Providers

Providers will meet every third Thursday during lunch (update as appropriate) to discuss clinical issues, protocols, and practice operations.

All Staff:

Two mandatory meetings, led by a consultant, are held every year that cover the required topics of Health Insurance Portability and Accountability Act and Occupational Safety and Health Administration. If staff are unable to attend, the session will be recorded and offered to staff at another convenient time.

Staff attend a meeting in the fall to prepare for flu shot clinics. Other meetings are scheduled based on current events (in-services on quality improvement, red-flag rules, practice handbook overview, malpractice insurance, and postpartum depression).

Incentives for Participation:

Staff are paid (if meetings are held during non-business hours, staff must follow exempt/nonexempt employee rules).

If meetings occur over the lunch hour, the practice will offer lunch, whenever possible.

The practice will also use this time for celebration birthdays or practice anniversaries, welcoming new employees, announcements, reminders, and kudos to staff for performance excellence and recognition.

MONITORING:

On a quarterly basis, the practice manager will assess how frequently team meetings and huddles were held to ensure compliance with the policy.

This policy shall be reviewed at least every 2 years.

Approved Date: ____/____/____

APPROVALS:

Physician Partner: _____

Date: ____/____/____

Administrative Partner: _____

Date: ____/____/____

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