



DAILY HUDDLE

Clinic Name

Who/Where: All dental staff, **meet Where & Time**

Objective: To provide a space for all staff members to collaborate together for communication/planning to ensure that all patient needs are able to be met.

Staffing Adjustments

- Review any staff member call-ins and any care team adjustments needed to accommodate.

Previous Shift Review

- What **went well**?
 - Celebrate the wins
- What could be **even better**?
 - Learn from the losses and make gracious assumptions of the actions of others
 - Review of any issues that require further discussion/debriefing/require patient follow up, etc.

Today's Schedule

- **Front Desk**
 - Appointment book notes
 - Insurance
 - Bad debts
 - Pre-authorizations sent / received
 - Payments due?
 - Openings in schedule – can we fill it?
 - S/F Update
 - New Patient Paperwork / Medical History Update
 - Patient Photo
 - Scheduling restrictions
- **Assistant**
 - BP/Pulse concerns
 - Premed?
 - Scheduling restrictions
 - Lab cases – are they here?
 - Potential Pre-authorizations needed?
 - Is treatment sequenced?
- **Dental Hygienist**
 - Probing depths need to be updated
 - Previous SRP? – should this be perio maintenance appointment?
 - Age
 - Radiographs needed?
 - BP/Pulse concerns
 - Premed?
 - Is treatment sequenced?
 - Continuing care
- **Dentist**
 - Medical History Concerns
 - What was done at the last appointment?
 - Is the treatment charted? What is going to be done?
 - Any possible changes in the treatment?
 - Any times for a call in emergency?

Patient Recall

- Have we completed reminder calls for tomorrow?

Team Shout Outs

- Recognize your team efforts, big or small
 - Celebrate mission moments
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