**Purpose:** Standard process for MA/Provider dyads to follow during AM and PM huddles (if shared MA, they should conduct dyad huddle w/ each Provider)

**Who:** Provider, MA

**Tools/Supplies Required:** EMR access

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| **#** | **What** | **How** | **Why** |
| 1 | MA completes Visit Prep (day prior to huddle)  | * See visit prep standard work.
 |  |
| 2 | MA to bring information to AM / PM dyad huddle.  | * Team to huddle in co-location area in front of computer.
* MA use schedule notes from visit prep for the huddle.
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| 3 | MA /Provider dyad to review schedule for the day and urgent in-basket items (Rx, myHealth, other) | * Review the details of individual appointments (i.e. labs, tests, health maintenance/Care Gaps, hospital documents)
* Discuss any future, standing, or pending orders that are to be released during the rooming process
* Determine availability for additional same day appointments and indicate potential slots for overbooking in EMR with a green dot in the schedule (not DAR).
* Adjust appointment lengths if necessary (i.e., 40 → 20 min).
* Discuss items that may interfere with smooth flow countermeasures. (i.e. can’t get records, pt. needs interpreter, MA leaves early etc.)

**Duration:** 5 minutes**Timing:** Begin 15 minutes prior to the first scheduled appointment of that session.  |  |