

Huddle Form

1. General Announcements (DDS & OA as relevant):

2. Production Overview (OA):

a. Month

Goal: Month to day: Variance:

b. Week

Goal: Week to day: Variance:

c. Day

Goal: Today: Variance:

3. Schedule Overview (OA)

a. Qty of patients scheduled today:

b. Qty confirmed patients:

c. Unconfirmed patients:

d. New patients:

e. Insurance eligibility verified: (Y/N)

f. Patients with balance due:

g. Patients needing emails, cell phone, HIPPA forms, other:

h. Does front need help from back today? (schedule, insurance, recalls, etc.):

4. Chart Audit (RDH, DA) – the clinical team will address following items:

a. Review what's on schedule today, what should be or is likely tx if other than scheduled?

b. Is there outstanding treatment we can present today?

c. Recall, next appointment plan?

d. Plan for new patients?

e. Include any personal pat notes: birthday, anniversary, new job, new baby, parents, family members who are pts, who isn't a patient.

f. Does back need help from front today?

5. Positive/Motivational Closing Thoughts (OA, Team)