**Beginning of Shift Team Checklists**

**Referrals Coordinator**

- Review referrals before their appointment and print any outstanding referrals to give to MA/Provider teams at huddle.
- Be logged in and ready to huddle with the MA/Provider teams at 8:30/1:15.

**Health Information Coordinator**

- Print all providers’ D’s requiring signature for the day. Give to providers at huddle and fax signed documents.
- Check schedule for any same-day add-ons. Obtain needed ER/specialty records, CAIR, Discharge summaries, etc.
- Be logged in and ready to huddle with the MA/Provider teams at 8:30/1:15

**Provider**

- First shift of the week preview the weeks scheduled appointments and make adjustments if possible to streamline each shift.
- Be prepared to huddle with MA 8:30/1:15 having reviewed urgent jelly beans and logged into the rooms.
- Check-in with RNs to see if there are TEs or eRXs that need clarification or provider input (prevent additional back and forth of TEs).
- Quickstart – be seeing first patient at 8:45/1:30

**MA 4**

- Help confirm appointments for providers. Ask flow/MAs whose schedule needs confirmation calls.
- Room patients as they come in.
- Take initiative to room pts. Notify flow, but don’t wait for them to ask for help.
- Prioritize who needs the help. Room patients who will be quick to room (i.e. not WCC) unless there aren’t other patients who need to be roomed.
- Communicate with flow (which rooms/patients, etc.)

**Flow Coordinator**

- Check fridge temps
- Perform controls
- Put up huddle TV in the am/ Give updates in 60 sec huddle
- Make sure supplies are available for providers/stock supplies
- Huddle with Nurses and providers
- Make sure to look at the providers schedule if there is a walk in
- Delegate tasks as needed to MA’s
- Notify providers when patients are ready to be seen
- Add rooming template

**MA**

- Arrive by 8:15
- Log into the computers
- Stock rooms (including printer paper as needed)
- Confirm appts (notify flow/MA4 if you need assistance)
- Huddle with provider by 8:30
- Stand up for 60 sec huddle
- Take over for the MA-4 if rooming your first appt of the shift

**RN**

- Arrive by 8:15
- Review resource schedule and let providers know what patients you have on the schedule
- Look at urgent TEs and eRXs. Communicate with providers verbally about any urgent outstanding issues.
- Huddle with each provider/MA teamlet