

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