

SAMPLE MORNING HUDDLE PROTOCOL

1. Yesterday's Schedule (Care Calls – Patients Response)

2. Today's Schedule: Do we anticipate problems?

3. Today's emergency time:

4. Next available production block: (Dr. – Crown & Bridge, Hygiene – Periodontal Tx. – New Patient)
Doctor _____ Hygiene _____
5. Patients with financial concerns:

6. Patients with deferred treatment:

7. Patients due for FMX's:

8. Hygiene patients that need assistance with perio charting.

10. New patient information:

11. Emergency patient information:

12. Clinical data (Special needs patients or procedures):

13. Lab cases arrived for next day:

14. Yesterday's total office productivity (Did we reach goal?)
_____ \$/Goal Yes No
15. Daily production goal for today (Will we reach it?)
Doctor _____ \$/Goal Yes No
Doctor _____ \$/Goal Yes No
Hygiene _____ \$/Goal Yes No
Hygiene _____ \$/Goal Yes No
Hygiene _____ \$/Goal Yes No
16. Month-to-date production goal: _____ \$
17. Month-to-date actual production: _____ \$
18. What patient will we ask for a referral:
