Checklist / Protocol

1. Intake and Preparation

- ☐ Confirm patient information (name, date of birth, MRN).
- ☐ Review presenting problem and reason for visit/referral.
- ☐ Ensure Release of Information (ROI) and consents are signed and uploaded.
- ☐ Collect baseline data (vitals, screenings, SDOH factors, risk stratification).

2. Interdisciplinary Team Huddle

- ☐ Review agenda (timeframe, objectives, cases to be discussed).
- ☐ Identify roles (facilitator, recorder, clinical leads).
- ☐ Share concise case summaries (focus on high-priority issues).
- ☐ Confirm risk level and quadrant/tier placement if applicable.

3. Case Review & Shared Decision-Making

- ☐ Discuss progress on patient's treatment/care plan.
- ☐ Evaluate barriers and SDOH factors impacting care.
- ☐ Identify interventions or referrals (internal and external).
- ☐ Document decisions in the shared care plan.

4. Action Items & Accountability

- ☐ Assign responsibilities with clear timelines.
- ☐ Record in EHR or tracking tool (dashboard, task manager).
- ☐ Confirm accountability (who will follow up on each action).
- ☐ Escalate high-risk cases as needed.

5. Follow-Up & Data Tracking

- ☐ Monitor progress against treatment goals and KPIs.
- ☐ Update dashboards (clinical outcomes, service utilization, SDOH impacts).
- ☐ Review action item completion at next huddle.
- ☐ Adjust plan of care as necessary.