

Guidance for Completing the PDSA Cycle Documentation Tool

Below is guidance for completing the PDSA documentation tool. Several questions are posed for each phase of the PDSA cycle to help you think through the idea/solution/change you want to test and what you want to learn from testing it. Complete the documentation tool as thoroughly as possible. However, it does not need to be grammatically correct and full sentences! More importantly, your concepts need to be clear and concise so anyone can understand what you have written.

“PLAN” Phase— Complete this section prior to the scheduled testing date!

TODAY’S DATE: *Date in which the “PLAN” phase is being documented on this form.*

CYCLE #: *Is this the first PDSA cycle to test a change? The 2nd? 3rd? etc... You will probably have more than one cycle for a particular change.*

PERSON COMPLETING PDSA CYCLE WORKSHEET: *Team member completing this form.*

AIM: *What is the overarching goal you are trying to achieve? E.g. Reduce show rates, decrease client time in the clinic.*

WHAT- CHANGE TO BE TESTED/DEVELOPED/IMPLEMENTED: *Are you testing, developing, or implementing a change? What is the change (e.g. idea or solution) you want to test to see if it will make an improvement to your current process? What do you want to find out during this PDSA cycle? Who/what is the change to affect (e.g. all Family Planning clients, just supply visit clinics, etc...)?*

TEAM PREDICTIONS ON THE IMPACT OF THE CHANGE: *What do you think will happen when you test your change?*

WHEN—SCHEDULED DATE TO TEST CHANGE: *What date(s) and time(s) will you be testing the change?*

WHO- PARTICIPANTS IN TEST AND THEIR ROLE/RESPONSIBILITY IN EXECUTING TEST: *Who are the members on the team that will participate in the test? What are their roles/responsibilities in executing the test? Who are not on the team but will be participating in the test? What are their roles/responsibilities in executing the test?*

OTHER—E.G. FORMS/TOOLS THAT NEED TO BE DEVELOPED, SCHEDULE CHANGES, ETC... *Are there any worksheets, surveys, data gathering tools, checklists, etc... that need to be developed? Do you need to change the schedule for the testing date? What other resources do you need to have in place to ensure your test goes as planned?*

“DO” Phase— Complete this section while you are testing the change to record observations!

SUMMARY OF DATA COLLECTED: *So far, what are you learning from the data you are collecting during the testing of the change? Any obvious findings? Any problems/issues with your data measures?*

TEAM OBSERVATIONS OF CHANGE TESTED/DEVELOPED/IMPLEMENTED: *What effects, if any, have you observed that you feel the testing/developing/implementing of the change has contributed to? Were the effects positive? Negative? Neutral? Has the PDSA cycle been carried out as planned? Have you run into any problems/issues with the plan?*

“STUDY” Phase— Complete this section as soon as you can after the “DO” phase! Complete “ACT” phase, too.

FINDINGS- WHAT HAPPENED WHEN CHANGE WAS TESTED/DEVELOPED/IMPLEMENTED: *What were the overall findings from the test? Include findings from team members and non members.*

FINDINGS- WHAT DID THE DATA YOU COLLECTED TELL YOU: *What are the findings from the data you collected?*

FINDINGS- COMPARE YOUR FINDINGS TO YOUR PREDICTIONS FROM THE PLAN PHASE- WHAT DID YOU LEARN: *Were your predictions right, wrong, somewhere in between? Do you need to test again to collect more information? Do you need to tweak the plan and conduct another PDSA cycle?*

“ACT” Phase— Complete this section in conjunction with the “STUDY” phase!

ANSWER THE FOLLOWING QUESTIONS: If you answered “Yes” to any of the questions, you are ready to plan your next PDSA cycle! Go to the “PLAN” Phase on a new PDSA Documentation tool worksheet and plan your next cycle.