

# PDSA Tracking Tool

Project Title:

Project Dates: \_\_/\_\_/\_\_ through \_\_/\_\_/\_\_

	Steps of PDSA Approach	Key Elements	Notes
<b>PLAN</b>	<b>Step 1</b> Getting Started	<input type="checkbox"/> Identify area, problem, or opportunity for improvement <input type="checkbox"/> Estimate and commit needed resources <input type="checkbox"/> Obtain approval (if needed) to conduct QI	
	<b>Step 2</b> Assemble the Team	<input type="checkbox"/> Identify and assemble team members (including customers and/or stakeholders) <input type="checkbox"/> Discuss problem or opportunity for improvement <input type="checkbox"/> Identify team member roles & responsibilities <input type="checkbox"/> Establish initial timeline for improvement activity and schedule regular team meetings <input type="checkbox"/> Develop Aim Statement <ul style="list-style-type: none"> <li>– <i>What are we trying to accomplish?</i></li> <li>– <i>How will we know that a change is an improvement?</i></li> <li>– <i>What change can we make that will result in improvement?</i></li> </ul>	
	<b>Step 3</b> Examine the Current Approach	<input type="checkbox"/> Examine the current approach or process flow <input type="checkbox"/> Obtain existing baseline data, or create and execute data collection plan to understand the current approach <input type="checkbox"/> Obtain input from customers and/or stakeholders <input type="checkbox"/> Analyze and display baseline data <input type="checkbox"/> Determine root cause(s) of problem <input type="checkbox"/> Revise Aim Statement based on baseline data as needed	
	<b>Step 4</b> Identify Potential Solutions	<input type="checkbox"/> Identify all potential solutions to the problem based on the root cause(s) <input type="checkbox"/> Review model or best practices to identify potential improvements <input type="checkbox"/> Pick the best solution (the one most likely to accomplish your Aim Statement)	
	<b>Step 5</b> Develop an Improvement Theory	<input type="checkbox"/> Develop a theory for improvement <ul style="list-style-type: none"> <li>– <i>What is your prediction?</i></li> <li>– <i>Use an “If . . . Then” approach</i></li> </ul> <input type="checkbox"/> Develop a strategy to test the theory <ul style="list-style-type: none"> <li>– <i>What will be tested? How? When?</i></li> <li>– <i>Who needs to know about the test?</i></li> </ul>	
<b>DO</b>	<b>Step 6</b> Test the Theory	<input type="checkbox"/> Carry out the test on a small scale <input type="checkbox"/> Collect, chart, and display data to determine effectiveness of the test <input type="checkbox"/> Document problems, unexpected observations, and unintended side effects	
<b>STUDY</b>	<b>Step 7</b> Study the Results	<input type="checkbox"/> Determine if your test was successful: <ul style="list-style-type: none"> <li>– <i>Compare results against baseline data and the measures of success stated in the Aim Statement</i></li> <li>– <i>Did the results match the theory/prediction?</i></li> <li>– <i>Did you have unintended side effects?</i></li> <li>– <i>Is there an improvement?</i></li> <li>– <i>Do you need to test the improvement under other conditions?</i></li> </ul> <input type="checkbox"/> Describe and report what you learned	
<b>ACT</b>	<b>Step 8</b> Standardize the Improvement or Develop a New Theory	<input type="checkbox"/> If your improvement was successful on a small scale test it on a wider scale <ul style="list-style-type: none"> <li>– <i>Continue testing until an acceptable level of improvement is achieved</i></li> <li>– <i>Make plans to standardize the improvement</i></li> </ul> <input type="checkbox"/> If your change was not an improvement, develop a new theory and test it; often several cycles are needed to produce the desired improvement	
	<b>Step 9</b> Establish Future Plans	<input type="checkbox"/> Celebrate your success <input type="checkbox"/> Communicate your accomplishments to internal and external customers <input type="checkbox"/> Take steps to preserve your gains and sustain your accomplishments <input type="checkbox"/> Make long term plans for additional improvements <input type="checkbox"/> Conduct iterative PDSA cycles, when needed	