PDSA Cycle Checklist
Job Aid

What is the PDSA cycle?

PDSA stands for:

• Plan – Identify an opportunity and plan for improvement
• Do – Test the theory for improvement
• Study – Use data to study results of the test
• Act – Standardize the improvement and establish future plans

PDSA is a cyclical process for improvement and testing changes that includes nine steps.

What are the steps under the Plan phase of the PDSA checklist?

The steps under the Plan phase of the PDSA checklist are:

1. Getting started –
   • Identify area, problem, or opportunity for improvement
   • Estimate and commit needed resources
   • Obtain approval (if needed) to conduct QI

2. Assemble the team –
   • Identify and assemble team members (including customers and/or stakeholders)
   • Discuss problem or opportunity for improvement
   • Identify team member roles and responsibilities
   • Establish initial timeline for improvement activity and schedule regular team meetings
   • Develop SMARTIE aim statement

3. Examine current approach –
   • Examine the current approach or process flow
   • Obtain existing baseline data, or create and execute data collection plan
   • Obtain input from customers and/or stakeholders
   • Analyze and display baseline data
   • Determine root cause(s) or problem(s)
   • Revise aim statement based on baseline data

4. Identify potential solutions –
   • Identify all potential solutions to the problem based on the root cause(s)
   • Review model or best practices to identify potential improvements
   • Pick the best solution (the one most likely to accomplish aim statement)

5. Develop an improvement theory –
   • Develop a theory for improvement (prediction using “if…then” approach
   • Develop a strategy to test the theory
What is the step under the Do phase of the PDSA checklist?

3 The step under the Do phase of the PDSA checklist is:

6. Test the theory for improvement –
   • Carry out the test on a small scale
   • Collect, chart, and display data to determine the effectiveness of the test
   • Document problems, unexpected observations, and unintended side effects

What is the step under the Study phase of the PDSA checklist?

4 The step under the Study phase of the PDSA checklist is:

7. Use data to study the result
   • Determine if test was successful
     • Compare results against baseline data and measures of success in aim statement
     • Did results match the theory/prediction?
     • Were there unintended side effects?
     • Was there an improvement?
     • Do you need to test the improvement under other conditions?
   • Describe and report what you learned

What are the steps under the Act phase of the PDSA checklist?

5 The steps under the Act phase of the PDSA checklist are:

8. Standardize the improvement or develop a new theory
   • If the improvement was successful on a small scale, test it on a wider scale
     • Continue testing until an acceptable level of improvement is achieved
     • Make plans to standardize the improvement
   • If the change was not an improvement, develop a new theory and test it

9. Establish future plans
   • Celebrate your success
   • Communicate your accomplishments to internal and external customers
   • Take steps to preserve gains and sustain accomplishments
   • Make long-term plans for additional improvements
   • Depending on the results of the “Do” and “Study” phases:
     • Adopt: standardize the improvements
     • Adapt: adjust the improvement process for improved results
     • Abandon: drop unsuccessful predictions and start again with a new prediction
   • Conduct iterative PDSA cycles, when needed

Where can I get more information on the PDSA checklist?

6 The Institute for Healthcare Improvement (IHI) provides excellent information on process improvement:
http://www.ihi.org/resources/Pages/HowtoImprove/default.aspx

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