

# PDSA Cycle Checklist

## Job Aid



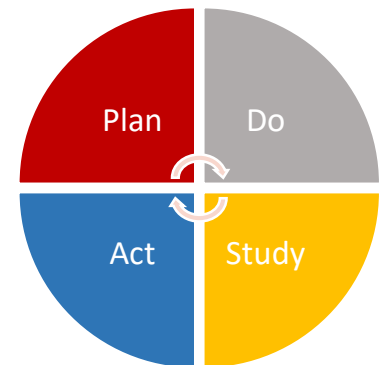
School Health Institute for Education  
and Leadership Development

### What is the PDSA cycle?

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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?

2

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?**

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**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?**

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**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?**

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**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?**

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**6**

The Institute for Healthcare Improvement (IHI) provides excellent information on process improvement:

<http://www.ihl.org/resources/Pages/HowtoImprove/default.aspx>