

Guidance on Completing a PDSA Form

You can and should fill out the PDSA form in multiple steps:

1. Complete the Contextual Information, Objective of the Cycle, and Plan sections
2. As you carry out the plan, complete the Do section.
3. Once you are done carrying out the plan, complete the Study section.
4. After you have made a determination about what to do next based on what you learned by studying your results, complete the Act section.

Contextual Information	
Status (web form only)	If you are editing a PDSA that has already received feedback from the Topic Lead, change the status to “Updated.”
State/Jurisdiction	The state or jurisdiction you are working with or for
Topic	One of the 5 topics of the CSLC
Strategy	List the strategy from the change package to which this cycle relates. This helps the Team Lead track your work over the life of the CSLC and identify the extent to which Strategy Teams are working on which strategies across the CSLC.
Cycle Number	Number your PDSA cycles to keep track of them. If your cycle is an adaptation, or reiteration (e.g. same test, different site) of a previously submitted PDSA, use sub-numbers such as 1, 1.1, 1.2, etc. If it is a completely new PDSA, use a new number (e.g. 1, 2, 3). If you are editing a submitted PDSA (for example, if you are completing the Study or Act portion of a previously submitted PDSA) do not change the cycle number.
State Date	The date on which the “Do” portion of the PDSA goes into effect.
End Date	The date by which you will complete the “Do” portion, study your results, and decide how to act based on your findings.
Is this cycle used to:	<p>Select one of the following:</p> <ul style="list-style-type: none"> • <i>Develop</i>: Preparation for changing how work or activity gets accomplished • <i>Test</i>: A small-scale trial of a new approach or a new process (change). • <i>Implement</i>: Making a change a permanent part of your system. Only changes tested under a wide variety of conditions and that demonstrate improvement should be implemented. • <i>Spread</i>: Intentional and systematic expansion of the number and type of people, units, or organizations implementing the change.
Questions you want to answer with this cycle	<p>Clearly state the questions that the team sets out to answer with this PDSA cycle.</p> <p>What do you hope to achieve or learn through this cycle?</p> <p>What idea are you working on that you think will result in improvement?</p> <p>Provide any contextual information you deem necessary to explain the purpose of the cycle.</p>

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Plan	
List the tasks needed to set up this cycle	List the necessary tasks to be completed in order for the test to be carried out. Pay special attention to how you will collect the data for the PDSA.
Person Responsible	One person should be assigned as responsible for each listed task.
When to be done	Date by which the task must be completed for the PDSA to begin and end on time.
Where to be done	If there is a specific organization, geographic location or other location, please note that.
Predict what will happen as a result of the cycle	Predict what will happen if the plan is carried out; remember, your prediction should be specific enough that you can tell if it came true or not at the end of this PDSA cycle. Refer to your questions and measures to make a more specific prediction. To the extent possible, make your predictions quantifiable.
Measure(s) to determine if prediction and cycle succeed	Identify the appropriate indicator(s) for the cycle.
Do	
Summary	<p>Include a simple summary of the work carried out through this cycle</p> <p>Clearly state problems or unexpected events (could be positive!) that occurred while carrying out the PDSA.</p> <p>Show your data from your measures in the Plan section of the PDSA cycle</p> <p>What you learned while carrying out the PDSA goes into the Study section</p>
Study	
Analysis	<p>Include a brief analysis of the data.</p> <p>Include qualitative feedback or observations by those involved in the PDSA</p> <p>Ask yourself:</p> <ul style="list-style-type: none"> • What are the lessons learned? • Was the PDSA cycle successful? Did your predictions come true?
Act	
Adapt, Adopt, Abandon	<p>Decide and state what you will do:</p> <ul style="list-style-type: none"> • Adapt: Start the cycle over again with a slightly different plan that incorporates what you learned during this cycle because the change nearly succeeded. • Adopt: Begin using the new approach systematically because the change was successful and is an improvement. • Abandon: Decide not to use the change or modify the change because it was not successful. <p>State what will happen in the next PDSA cycle (develop a change further, test on a larger scale, implement/adopt in daily practice).</p>
Supplemental Materials	
Submit additional materials	If you have supporting materials, such as the material you are working to develop, or an Excel spreadsheet tracking your measures, please feel free to upload them to the website.