**PLAN-DO-STUDY-ACT**  
PDSA Checklist

PLAN: Identify an opportunity and plan for improvement

**Step One: Getting Started**

* **Identify area, problem, or opportunity for improvement**
* **Estimate and commit needed resources**
* **Obtain approval (if needed) to conduct QI**

**Step Two: Assemble the Team**

* **Identify and assemble team members (including customers and/or stakeholders)**
* **Discuss problem or opportunity for improvement**
* **Identify team member roles & responsibilities**
* **Establish initial timeline for improvement activity and schedule regular team meetings**
* **Develop SMART aim statement**
  + **What are we trying to accomplish?**
  + **How will we know that a change is an improvement?**
  + **What change can we make that will result in improvement?**

**Step Three: Examine the Current Approach**

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

**Step Four: 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 your aim statement)**

**Step Five: Develop an Improvement Theory**

* **Develop a theory for improvement**
  + **What is your prediction?**
  + **Use an “If… Then” approach**
* **Develop a strategy to test the theory**
  + **What will be tested? How? When?**
  + **Who needs to know about the test?**

DO: Test the theory for improvement

**Step Six: Test the Theory**

* **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**

STUDY: Use data to study results of the test

**Step Seven: Study the Results**

* **Determine if your test was successful:**
  + **Compare results against baseline data and the measures of success stated in the aim statement**
  + **Did the results match the theory/prediction?**
  + **Did you have unintended side effects?**
  + **Is there an improvement?**
  + **Do you need to test the improvement under other conditions?**
* **Describe and report what you learned**

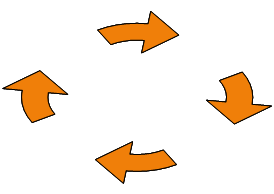
ACT: Standardize the improvement and establish future plans

**Step Eight: Standardize the Improvement or Develop a New Theory**

* **If your 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 your change was not an improvement, develop a new theory and test it; often several cycles are needed to produce the desired improvement**

**Step Nine: Establish Future Plans**

* **Celebrate your success**
* **Communicate your accomplishments to internal and external customers**
* **Take steps to preserve your gains and sustain your accomplishments**
* **Make long term plans for additional improvements**
* **Conduct iterative PDSA cycles, when needed**



**Act**

**Study**

**Do**

**Plan**

PDSA Checklist taken from, *Embracing Quality in Public Health*.   
This book is available for download at [www.mphiaccredandqi.org](http://www.mphiaccredandqi.org).