

Step 6.9 – Change and Measure

PDSA Cycle Worksheet Example

This completed PDSA Cycle Worksheet demonstrates how your team can use this tool to help plan, conduct, and monitor progress with tests of change conducted to help you meet your aim. Refer to Case Study 1.2. For instructions on how to use this tool, refer to 6.8 PDSA Cycles Worksheet.

Model for Improvement: Three questions for improvement

1. What are we trying to accomplish (aim)?

Over the next six months, we will redesign the way we schedule and communicate therapy appointments to ensure that residents are attending all scheduled therapy appointments.

2. How will we know that change is an improvement (measures)?

Reduce the percentage of missed therapy appointments on the transitional care neighborhood by September 1, 2014. Baseline for missed appointments is currently 32%. Target is 10% or less.

3. What change can we make that will result in an improvement?

Therapy schedule will be updated using the electronic health record, retrieved on the Transitional Care neighborhood, and made available to each nursing assistant at the beginning of AM and PM shifts.

What changes
are we going to
make based on
our findings?



What exactly are
we going to do?

What were
the results?

When and how
did we do it?

Plan

What change are you testing with the PDSA cycle(s)? Copy of electronic version of therapy schedule will be attached to each nursing assistant assignment sheet at the start of the AM and PM shifts.

What do you predict will happen and why? More residents will be attending their scheduled therapy appointments because the nursing assistant will know their schedule and ensure that they are available.

Who will be involved in this PDSA?

Therapy manager, therapy assistant, Transitional care clinical manager, Transitional care nursing assistant, Transitional care health unit coordinator

PDSA will be carried out for one resident on the transitional care neighborhood for 5 days.

How long will the change take to implement? 5 days

What resources will they need? Time to train staff on new process

What data need to be collected? Number of missed and scheduled therapy appointments during the test period

List your action steps along with person(s) responsible and time line.

1. Therapy manager, therapy assistant, transitional care clinical manager, and transitional care nursing assistant will meet by month/date/year to review and revise current therapy scheduling process.
2. Therapy manager will train therapy assistants by month/date/year on how to use therapy scheduling software
3. Therapy manager will train transitional care health unit coordinator by month/date/year on how to retrieve therapy schedule using electronic health record
4. 5 day trial will begin with one resident on the transitional care neighborhood on month/date/year:
 - Therapy assistant will upload therapy schedule for following day to electronic health record by 5:00 PM
 - Health unit coordinator will make copies of therapy schedule and attach them to each nursing assistant's assignment sheets each day prior to the beginning of the AM and PM shifts
 - Nursing assistants will refer to therapy schedule attached to their assignment sheet and ensure all residents are ready for therapy at their scheduled time
 - Therapy manager will track therapy appointments for test resident – were any appointments missed?
 - Transitional care clinical manager will meet with the team to review the test results

Do

- Carry out the test on a small scale
- Document observations, including any problems and unexpected findings
- Collect data you identified as needed during the “plan” stage.

Data indicated that of the 8 therapy appointments this resident had scheduled from month/date/year to month/date/year, the resident missed two of these appointments. The two missed appointments were due to the resident not wanting to attend therapy due to complaints of pain. The missed appointments were not due to a communication error – the nursing assistants were aware of the therapy appointments. The nursing assistants did report that the therapy schedule was attached to their assignment sheets each day.

The process for retrieving the therapy schedule from the electronic health record went well. There was a question about how this will work on the weekends since the health unit coordinator isn't available to print off the assignment worksheets prior to the AM and PM shifts.

Study

- Study and analyze the data. Determine if the change resulted in the expected outcome.
- Were there implementation lessons?
- Summarize what was learned. Look for: unintended consequences, surprises, successes, failures.

Describe the measured results and how they compared to the predictions.

The test resident missed 25% of her therapy appointments during this test period. However, the missed appointments were not due to communication issues. The change resulted in what we expected – no missed therapy appointments due to the nursing assistant not being aware of the therapy schedule.

However, to make a bigger impact on decreasing the number of missed appointments and to ensure that the resident is receiving as much benefit as possible from therapy, we need to work on our action plan/other PDSAs for these issues that were identified as contributing factors:

- Pain management interfered with the resident's ability to attend the scheduled therapy. Individualized pain management interventions need to be established for each resident to assure pain does not interfere with therapy attendance.
- Rehab plans are not discussed with the family and resident on admission. Goals and interventions are not identified in a timely manner.
- Not enough therapy staff or equipment to meet therapy needs. Would more staff and/or more equipment allow therapy to accommodate unanticipated needs and be more flexible with scheduling?

Act

Based on what was learned from the test:

Adapt – modify the changes and repeat PDSA cycle.

Adopt- consider expanding the changes in your organization to additional residents, staff, and units.

Abandon – change your approach and repeat PDSA cycle

Describe what modifications to the plan will be made for the next cycle from what you learned.

- Will educate transitional care staff on new process during neighborhood meeting
- Will implement the new process for all residents in transitional care neighborhood
- The transitional care health unit coordinator will continue to print the therapy schedules and attach them to the nursing assistant assignment sheets Monday-Friday and the night supervisor will do this task on the weekends
- Therapy manager will continue to track missed appointments
- Nursing director will schedule a meeting with the team to see how things are going
- Changes will be made as necessary
- Team will continue to meet to plan further actions related to contributing factors

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