



PDSA Cycle Worksheet

NYSCCMP Quality Improvement Learning Collaborative

PDSA Cycle Name and Brief Description: Extract patient level data from the Electronic Medical Record (EMR) on all ID Clinic patients who currently have a positive PHQ-9 or GAD-7 scores. Additionally, continue to identify patients from previously extracted data who have dropped out of care. We will use the information to identify patients to target for outreach and enrollment in Collaborative Care.	Start Date: 08/01/2023	End Date: 08/31/2023
	Cycle #: 5	Cycle Owner: Wyckoff
Objective of Cycle: ☒ Collect Data/Develop Change ☐ Test a Change ☒ Implement a Change		

PLAN: Identify questions. Predict the results. Determine data to be collected and by whom.	
Questions	Predictions
How many referrals are received? How many of them are eligible for collaborative care or how could we assist to enable the access to care?	Patients will be more likely to schedule first visits if a warm hand off was given at time of medical appointments. Patient's wait time to access to care will be limited/longer due to the application of a medical insurance that would make them eligible for collaborative care
Action Plan	Data to be collected
Behavioral Health Care Manager will continue to emphasize the importance of warm hand offs during our clinic morning Huddles. BHCM will prioritize referrals originated during medical visits in order to schedule first visit during the same or following week. Behavioral health Care Manager will continue to reach out patients who have history of a mental condition and reach out during their follow up medical appointment.	Number of completed appointments [3] and new referrals [2] to be contacted/scheduled.
DO: Carry out the change or activity and collect the data. Document what happened (+/-).	
BH Care manager will initiate process of insurance application in order to deliver collaborative care services to those patient who have limited insurance coverage as per behavioral health services.	
STUDY: Summarize what you learned. Identify any new questions/issues. Compare data with predictions.	
Learnings: Many of the identified patients or received referrals are yielding ineligible cases for collaborative care as ID patients primarily have access to medical care through specific Insurance: ADAP. How can we make this process faster?	

Results: Three completed appointments, one of which is ineligible. Additionally, 1 reschedule; and another new patient interested in services but no insurance coverage yet.	New Issues or Questions: Time limitations to accessibility to Behavioral health services could impact receptiveness to engage in care once process of insurance is completed.
ACT: Determine next steps from what you learned.	
Plans for the Next Cycle: 1) Behavioral Care Manager utilize staff support to acquire extended insurances for identified BH referrals 2) BHC will prioritize clinic referrals, and will continue reaching out to previous identified positive PHQ-9 and GAD-7 screeners	

Plan, Do, Study, Act (PDSA) Cycle Checklist:

Plan

- ☐ Define the **Objective Type** for the cycle: Collect Data/Develop Change, Test a Change, Implement a Change
- ☐ Define the specific **Questions** to be answered from this cycle
- ☐ Make a **Prediction(s)** about the answer to each question, and the basis for the prediction
- ☐ Define the **Action Plan** to answer the questions
 - What (actions), Who, Where, When, How
- ☐ Create a plan to collect data.

Consider:

- Are historical data available to answer the questions or will new data be required?
- Does the team agree on the predictions (some or all)?
- What tools and methods will be used to collect and analyze the data?
- Did you assign responsibilities for collection and analysis of the data?
- Is training needed for individuals collecting data?
- If testing, can the plan be carried out on a small scale?
- If testing or implementing, have you considered people outside the team who will be impacted by this plan?

Do

- ☐ Carry out the plan
- ☐ Capture any observations in carrying out the plan, especially if unexpected
- ☐ Begin analysis of data

Consider:

- Were there things observed that were not part of the plan?
- Were there things that went wrong?

Study

- ☐ **Analyze** the data and observations
- ☐ Compare the data with **predictions**
- ☐ Summarize **what was learned** (new knowledge) in this cycle

Consider:

- Do the results of the cycle agree with the predictions made in the planning phase?
- Under what conditions could the conclusions from this cycle be different?
- What are the implications of the unplanned observations and problems in the Do Step?
- Do the data and observations help answer the questions posed in the plan?
- Can learning be applied in other areas?

Act

- ☐ List any changes that can be made to the process
- ☐ Define the **objective type** and **objective** for the next PDSA cycle

Consider:

- What is the next cycle objective based on the learning from this cycle?
- Are we ready to develop possible changes? What are our theories?
- Are we ready to test a change?
- Are we ready to implement a change?
- Do we still need to collect data in order to understand the current situation?

Additional PDSA Tips

- Complete the Study Step as a team activity
- Assign a **PDSA Owner** to coordinate the cycle
- Consider completing PDSA cycles from team meeting to team meeting
- Test on a small scale to maximize learning and reduce risk
- Document only enough to ensure there is a well-defined plan, observations and data are collected and analyzed, and learning is captured
- The Act step becomes the beginning of the Plan step on the next cycle