

CATCH RURAL Falls

**Coordinated Action Toward
Community Health: RedUce
Risk And Limit Falls**

**Applying Plan-Do-Study-Act (PDSA)
Cycles to Improve Fall Risk Screening**

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Introductions and Contact Information

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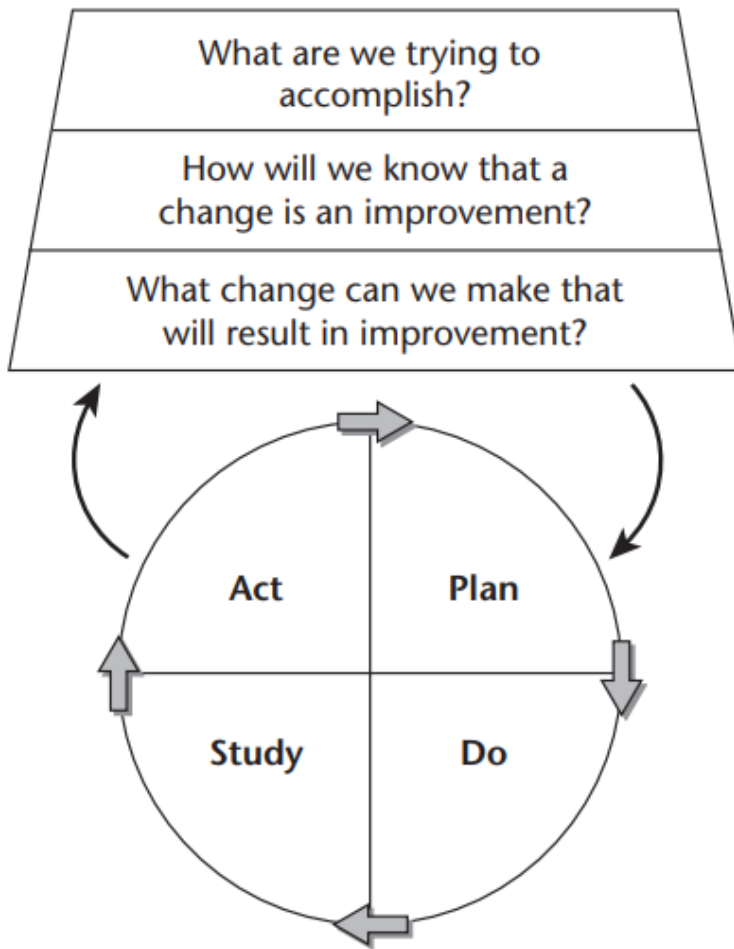


Educational Objectives

- Describe the intended purpose of Plan-Do-Study-Act (PDSA) cycles
- Describe each element of a PDSA cycle
- Apply the PDSA approach to improve fall risk screening in your clinic



The Model for Improvement



- ✓ Provides a framework for developing, testing, implementing, and spreading changes that result in improvement
- ✓ Can be applied widely to many different types of problems and situations
- ✓ Attempts to balance careful study with action
- ✓ Emphasizes and encourages 'trial-and-learning' as an iterative process for improvement
- ✓ Allows project plans to adapt as learning occurs

“Plan”



- What question do you want to answer with this test?
- What do you think will happen? (make a prediction)
- Create a plan to test the change
- Identify the data you need to collect to help answer your question

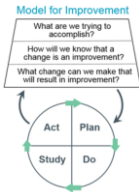
Fall Risk Screening Example

Question to Answer: Will our clinic increase fall risk screening completion rates for adult patients ages 65 and older?

Prediction: Fall risk screening completion rates will increase from 50% to 75% over the next two weeks. Staff will identify successes and barriers to completing fall risk screening that will be addressed in the next test of change.

Plan: During the next two weeks, all patients ages 65 and older who have not completed a fall risk screening in the past six months will be offered the CDC STEADI's Stay Independent 12-question fall risk screening during their appointment. Medical assistants and nurses were provided with in-person training and written instructions for how to distribute the Stay Independent screening tool to patients, educate them about the purpose of the screening, and assist them with completion if needed. The clinic wants to trial if the process works well if patients complete the Stay Independent screening tool in the appointment room after completion of vitals, but prior to their visit with their provider.

Data to collect: In order to calculate rates of fall risk screening for eligible patients, we will collect data from the medical records of all patients ages 65 and older during the two-week trial timeframe. We will need to determine which of those patients do and do not have Stay Independent fall risk screening results documented in the EMR. The completion rate = those who have fully completed Stay Independent screening documented divided by all patients ages 65 and older seen in the clinic. Medical assistants and nursing staff will also document their experience/observations of the current process for administering the Stay Independent screening tool in a separate document.



Checklist for Developing the Plan

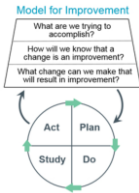
- Establish the objective of the test
- Ensure key background information is available to understand the plan
- Be clear about the change(s) to be tested in this specific cycle
- Specify the question(s) to be answered
- Specify the measures that will be collected in this specific test cycle
- Generate your predictions about what will happen (related to the question(s) to be answered in this test cycle)
- Establish the test design
 - ✓ Specify the scale of the test
 - ✓ Clarify the people or things selected for this test and your sampling strategy
 - ✓ Clarify the when and where
 - ✓ Describe the test design
 - ✓ Describe the method of data analysis planned for the 'study' phase
 - ✓ Discuss the possible influential uncontrolled conditions



“Do”



- Run your test
- Collect and monitor data
- Document any successes, issues, problems, unexpected observations along the way



Fall Risk Screening Example

- Plan is initiated, and for two weeks the clinic will run a trial of having patients ages 65 and older complete the Stay Independent screening tool upon completion of vitals
- Feedback is solicited from staff at the regular monthly staff meeting 1 week later. Staff anecdotally report that providers are happy with the depth of information available on the screening tool. Some patients skipped answering a few of the questions on the screening tool. It was unclear if they ran out of time before the provider entered the room, or if they chose not to answer those questions. Two patients requested help completing the screening tool, and one declined completing the screening tool.
- Staff encouraged to continue to document their experience/observations.
- After the two weeks are complete, data are pulled from the medical record for analysis. The experiences/observations documented by staff are also compiled.



“Study”



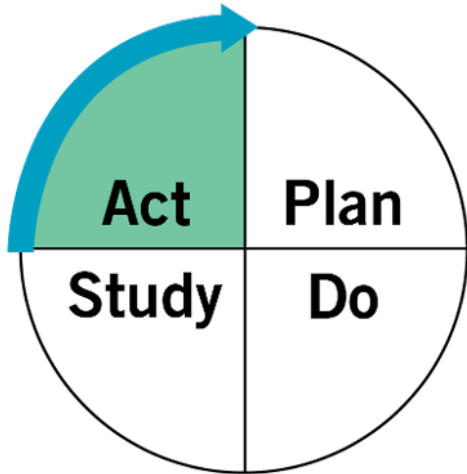
- Analyze your data for this test
- Compare your data to the prediction made for this test
- Summarize what was learned from this test

Fall Risk Screening Example

- Analysis reveals that Stay Independent screening tool completion rates increased from 50% to 65%
- Staff meet again to discuss the improvement observed, successes and barriers, and brainstorm next steps
- Discussion about the test of the process of having patients complete the Stay Independent screening tool upon completion of vitals reveals the following:
 - Patient education on completing the screening tool should reinforce completing all 12 questions on the screening tool
 - In most cases, the patients had just enough time to complete the screening tool before the provider entered the room, but this could be explored further
 - There might be time for patients to complete the Stay Independent screening tool in the waiting room given the average patient wait time in the waiting room



“Act”

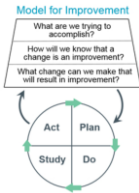


- Decide to:
 - Adapt – modify and run another test
 - Adopt – test the change on a larger scale
 - Abandon – do not run another test on this change
- Create a plan for the next PDSA cycle

Fall Risk Screening Example

Adaptations/Plan moving forward:

- The clinic decided to augment their patient education on completing the Stay Independent screening tool to reinforce completing all 12 questions on the screening tool. Staff suggested a script would help.
- The clinic decided to keep the same process – after completion of vitals, patients complete the Stay Independent screening tool in the appointment room prior to their visit with their provider – to see if the change in patient education helps to increase screening completion rates. If not, they will revisit a possible change in the timing of completing the Stay Independent screening in a third test of change.



Rapid Cycle PDSA Testing: Fall Risk Screening Example

Cycle	Plan	Do	Study	Act
1	Educate MAs and RNs to administer Stay Independent screening tool and associated patient education for patients ages 65 and older.	For 2 weeks, all patients ages 65 and older who have not completed a fall risk screening in the past six months will be offered the Stay Independent screening after completion of vitals.	Compare desired to actual Stay Independent screening completion rates. Explore reasons behind successes and barriers.	Update patient education to reinforce completing all 12 questions on the screening tool.
2	Develop script for staff to help explain to patients the importance of completing all 12 questions on the Stay Independent screening.	For another 2 weeks, all eligible patients will be offered the Stay Independent screening after completion of vitals, including the updated patient education.	Compare desired to actual Stay Independent screening completion rates. Discover that screening completion increased, but clinic was unusually busy and some patients did not receive the screening after vitals.	Make plans to trial offering the screening to patients while in the waiting room, and patients could finish in the appointment room after vitals if needed.
3	Educate admissions desk staff to administer Stay Independent screening tool and associated patient education for patients ages 65 and older.			



PDSA Self-Assessment



- ✓ PDSA cycles are rarely intended to be a 'one-and-done' situation
- ✓ Start with small scale tests of change with a series of follow-up tests before making changes on a larger scale
- ✓ Use a variety of measures to evaluate the changes and their implementation
- ✓ Identify and address implementation barriers
- ✓ Refinement is expected – this is 'trial-by-learning' for improvement



Summary: Review of Objectives

- The Model for Improvement and PDSA cycles are useful tools to guide fall risk screening improvement efforts
- Create a clear, focused plan for a small test of change to help you get started
- Be clear on what question(s) you are trying to answer to help inform the data you need to collect in each test of change
- Remember this is an iterative process to support change over time



Model for Improvement Resources

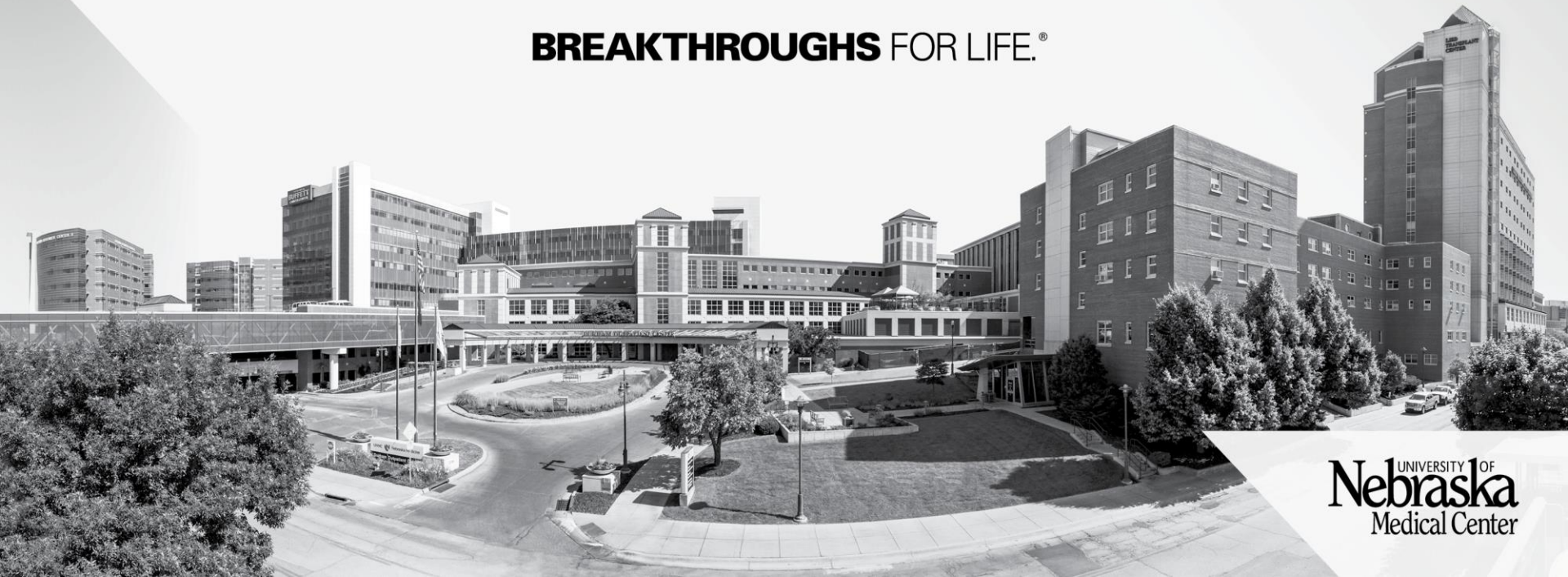
- Institute for Healthcare Improvement. QI Essentials Toolkit: PDSA Worksheet.
<https://www.ihp.org/resources/tools/plan-do-study-act-pdsa-worksheet>





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