

GUIDE TO SOCIAL RISK SCREENING AND REFERRAL-MAKING

STEP 5: ROLL OUT AND ITERATE



Step 5: Roll Out and Iterate your Social Risk Plan



Your final step is to implement your Social Risk Plan, and revise it as needed using a PDSA cycle.

This guide will help your Social Risk Project Champions in these tasks.

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Step 5: Plan, Do, Study, Act (PDSA) Cycle Steps and Considerations



What is a Plan, Do, Study, Act (PDSA) Cycle?

PDSA cycles are a way to test changes in your clinic by planning, doing, observing results, and acting on what is learned. Below are steps and considerations when creating your PDSA cycle.

	Steps	Considerations
Plan	<ul style="list-style-type: none"> Define cycle's Objective: Collect Data / Develop Change; Test a Change; Implement a Change Define specific Questions to be answered in this cycle Try to Predict the answer to these questions, noting the basis for the prediction Define an Action Plan to answer: What (actions), Who, Where, When, How Create detailed Data Collection and Analysis plan 	<ul style="list-style-type: none"> Are data available to answer the questions, or is new data needed? Does the team agree on the predictions? How will the data be collected and analyzed? Who will collect and analyze the data? Is training needed for this person? Is the plan consistent with the project charter? Can the plan be tested on a small scale? Will people outside the team be impacted by this plan? Has a change management plan been considered?
Do	<ul style="list-style-type: none"> Carry out the plan Capture observations in carrying out the plan, especially if unexpected Begin analysis of data 	<ul style="list-style-type: none"> What happened that you did not anticipate? Did anything go wrong? Were there any events that affected the data you collected?
Study	<ul style="list-style-type: none"> Analyze the data and observations Compare data with predictions Summarize what was learned (new knowledge) in this cycle Develop / update graphical tools; include in PDSA cycle document 	<ul style="list-style-type: none"> Do results of the cycle agree with your predictions? Under what conditions might the cycle's conclusions differ? What are implications of the unplanned observations? Do the data / observations answer the questions posed? Are charts, graphs or diagrams annotated with what was changed / learned? Can learnings be applied in other areas?
Act	<ul style="list-style-type: none"> List changes that can be made to the process Define the objective for the next cycle 	<ul style="list-style-type: none"> What is the next cycle objective, based on learning from this cycle? Are you ready to develop possible changes? Are we ready to test a change? Are we ready to implement a change? Do we need more data?

Step 5: PDSA Cycle Worksheet



Use this PDSA social risk example as a guide to help you develop PDSAs for social risk screening and data collection workflows in your clinic. Improvement and PDSAs are ongoing, as you apply what you learn from each cycle. Here is an example of a social risk implementation PDSA cycle.

PDSA Cycle Name and Brief Description		
Test time required to screen and document social risk data	Start Date:	End Date:
Cycle description: Data collection for documentation time of social risk screening	9/1/18	9/8/18
Objective of Cycle: Test efficiency of MA social risk screening and documentation	Cycle #: 1	Cycle Owner: RN Care Manager

PLAN: Identify questions. Predict results. Determine data to be collected and by whom.			
Questions:	Predictions:	Data to be collected:	Who collects data? How long will they collect data?
How long will it take to enter screening results into the workflow?	Entering screening results into flow sheet will take 8 minutes.	1. Time needed to screen patients with X questions. 2. Time needed to enter screening results into flowsheet.	1. MA will keep track of time it takes to ask and enter screening results in Epic. 2. MA will track time points for one week.

DO: Carry out the change or activity, collect the data. Document what happened (+/-).
Results: Entering screening results into Epic took an average of 2 minutes per screening.

STUDY: Summarize what you learned; identify any new questions / issues; compare with predictions; compare results across teams / MAs.		
Learnings: Entering screening results into social risk flowsheet did not take as long as predicted. Some patients did not want assistance, despite reported social risk difficulties.	Results: No significant time burden to enter screening results into Epic flowsheet.	New Issues or Questions: We need to track patients who decline assistance, so someone can check in at their next visit. We need to update our list of external resources.

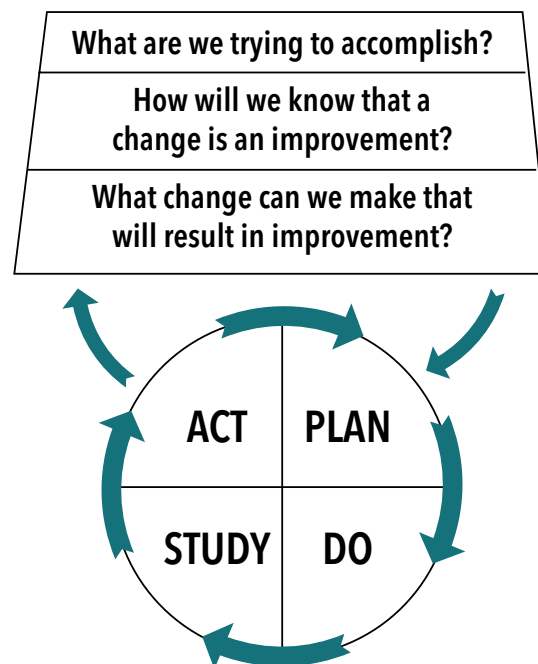
ACT: Determine next steps based on what you learned in this cycle. Choose whether to test under different conditions (e.g., different day of the week) to confirm or disprove improvements.		
Actions: Continue entering social risk screening results into Epic. Update our list of external resources.	Next Cycle: Track the number of patients identifying social risk needs yet declining assistance.	Who will be involved: CHWs, BH providers, medical assistants, patients?

Step 5: Additional PDSA Tips



- To get input from various points in the process that is valuable to improvements/learnings, always complete the Study Step with all members involved in social risk data collection.
- Assign a PDSA Cycle Lead to coordinate the cycle.
- Consider completing PDSA to coincide with team meetings (e.g., team meetings occur every Monday, run a PDSA cycle from Monday to Monday).
- Move to testing changes when you have good theories and changes to test.
- Test on a small scale to maximize learning and reduce risk.
- Implementation plans should consider a change management plan to ensure control in schedules, scope, communication, and resources and minimize the impact of the change.
- 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.

MODEL FOR IMPROVEMENT



Step 5: PDSA Cycle Form



Use this template to create a PDSA cycle for your social risk screening activities.

PDSA Cycle Name	Start Date:	End Date:
Brief Description	Cycle #:	Cycle Owner
Objective of Cycle: <input type="checkbox"/> Collect Data / Develop Change <input type="checkbox"/> Test a Change <input type="checkbox"/> Implement a Change		

PLAN: Identify questions. Predict the results. Determine data to be collected and by whom.

Questions	Predictions
Data to be Collected	Assignments

DO: Carry out the change or activity and collect the data. Document what happened (+/-)

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STUDY: Summarize what you learned. Identify any new questions/issues. Compare data with predictions.

Learnings:	
Results:	New Issues or Questions:

ACT: Determine next steps from what you learned.

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Next Cycle:	Ad Hoc Members:

Step 5: PDSA Cycle Tracker



Use this template to track your PDSA cycles.

Improvement Project Name:

Aim Statement:

Cycle #	Cycle Name	Cycle Owner	Start Date	End Date	Questions	Predictions	Results
1							
2							
3							
4							
5							
6							
7							

Congratulations!!!

You completed Steps 1-5 of implementing social risk screening and referral-making!