

# PDSA: Plan-Do-Study-Act TOOL

Test Topic: Daily Huddle

Cycle #: 1

Date: March 30th

## PLAN

The purpose of this cycle is to:  Develop  Test  Implement

determine if having a morning huddle will improve the efficiency in the clinic.

### What questions do you want to answer?

### What are your predictions?

1. How many appointments will be saved as a result of reviewing the schedule
2. Will the huddle improve clinic efficiency?
3. How long will the huddle take?
4. What information will be needed to ensure the huddle is effective?
5. Will the huddle be effective in improving communication and reducing stress for all?

1. 2-3
2. Yes minutes behind will be reduced by 50%
3. Between 5-10 minutes if prepared.
4. All info required will be accessible on the EMR, so huddle must take place at front desk.
5. Yes, attendees will see the communication as valuable.

### Plan to collect data to answer your questions:

What data will be collected?	How? (checklist, chart audit)	Who? (name or role)	When? (times, dates – be specific)	Where? (unit, area, charts)
1. Number of appointments saved (Redundant visits, no shows would be reduced, visits may be deferred to other providers, allows better visit prep)	Supply demand and activity sheet	Darla	daily	Reception
2. Time huddle took	Using clinic clock	Dr. John	during huddle	Reception
3. Attendees opinion of the huddle	Ask team	All	end of the week	Reception
4. Minutes behind at days end	Minutes behind data sheet	Dr. John	each day in clinic	in clinic

### List tasks necessary to set up test:

What? (specific task)	How? (checklist, chart audit)	Who? (name or role)	When? (times, dates – be specific)	Where? (unit, area, – be specific)
1. Send out reminder to team	On EMR	Darla	Friday before	Reception area in EMR
2. Meet to study the results of the first cycle and plan the next	At team meeting: review data and impressions	Team	Friday after	Team room

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## DO

### What did you observe during the test? Were there any unexpected observations?

The huddle was held at noon on April 2. All team members received a notification from Dr. John and showed up on time. Darla reviewed the clinic list and noted that two of the patients had lab results in, and that one of the patients was in the Emergency Department the previous day. Dr. John was able to review the lab results rather than search for them during the patient visit. Darla called to the ER to have reports sent in preparation for the visit. She also noted that one of the patients had called in the morning for their 3pm appointment but is also booked for next week. When the patient who had an appointment the next week presented she notified them that their appointment next week was cancelled. She also noted that the 1030 patient did not show for their previous 3 appointments. She later called a patient to remind them of the visit the patient then cancelled. Dr. John noted that he had received an email from one of his patients asking if some forms had been forwarded to his Lawyer. Kim, RN was able to locate the appropriate forms, fax them to the patients Lawyer and inform the patient.

Dr. John added that he had scheduled a conference call with a colleague at the end of the da and wanted to ensure that one spot be left open at 2 pm to accommodate this call. The slot was blocked

## STUDY

### Analyze your data and describe the results. How do the results compare with your predictions?

#### What did you learn from this cycle?

The team found the huddle to be effective in ensuring that everyone knew what was happening. One appointment slot today was opened due to the cancelled patient and another was saved for next week to eliminate a potentially redundant visit. Dr. John was prepared for all visits and did not have to search for results. He had time for his conference call. Typically the clinic runs 30 minutes behind at the end of the day on the day of the huddle the clinic ran only 15 minutes behind.

## ACT

### Are you ready to implement?

- Yes (I am confident that there is measured improvement, changes have been tested under different conditions and questions answered.)**
- No (I have more questions, need to make adjustments and test again, OR risks outweigh benefits – new idea required.)**

### What is your plan for the next cycle?

The team decided to continue to 'huddle' as it resulted in some gains considering the minimal set up and planning required. The team really wanted to know if the huddle would decrease the wait time for patients and if visits were 'planned and prepared so they decided to collect cycle time in addition to the other measures on the next round of the test.

Darla, Kate and Dr. John

Team: \_\_\_\_\_