OBESITY MANAGEMENT IN PRIMARY CARE CERTIFICATE PROGRAM:
A Practice Management & Leadership Training Program for PAs and NPs

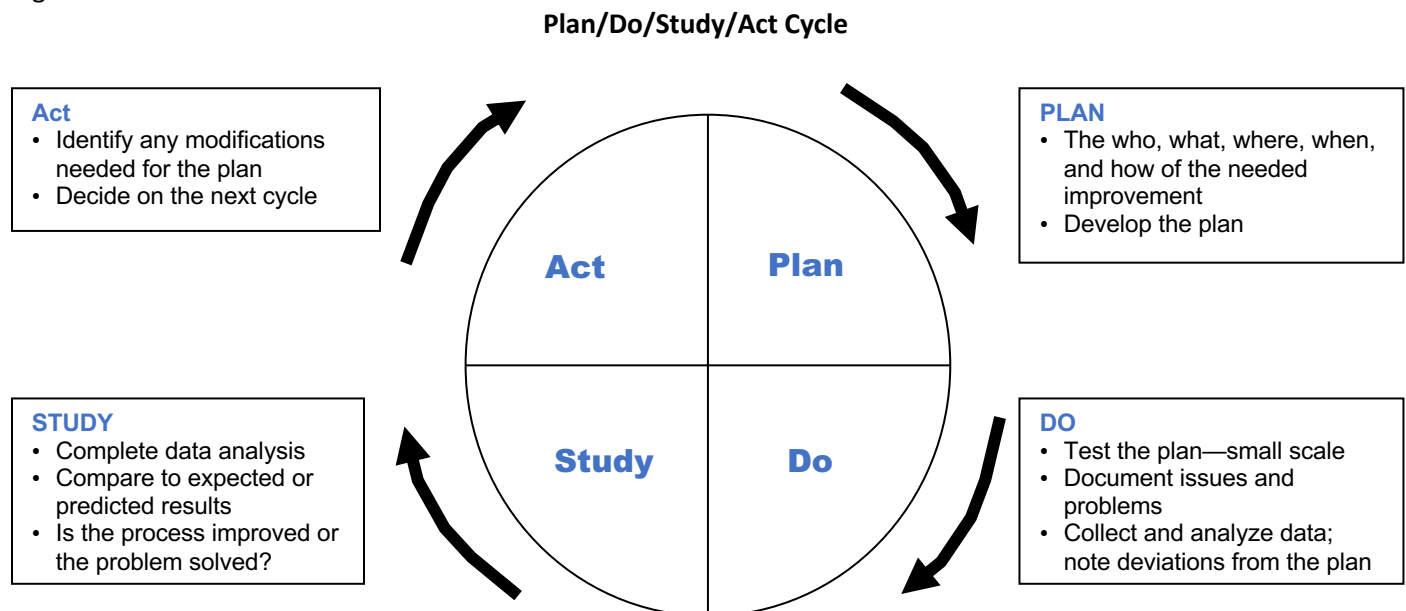**Obesity Management in Primary Care Workshop**
Getting Started with PDSA Cycle Planning
PDSA Breakout: Participant Worksheet

ACTION ITEM: **Let us begin by reviewing Continuous Quality Improvement (CQI) and the Plan, Do, Study, Act cycle we will be using for this project.**

CQI is a cycle designed to enhance office processes, leading to improved patient and practice outcomes. The following is an example of one plan that can be used, and is based on the Plan, Do, Study, Act (PDSA) method.

Figure 1

Plan/Do/Study/Act Cycle

Act
- Identify any modifications needed for the plan
- Decide on the next cycle

PLAN
- The who, what, where, when, and how of the needed improvement
- Develop the plan

STUDY
- Complete data analysis
- Compare to expected or predicted results
- Is the process improved or the problem solved?

DO
- Test the plan—small scale
- Document issues and problems
- Collect and analyze data; note deviations from the plan

ACTION ITEM: **During this workshop, please work in your assigned group and reflect on your current practice behaviors regarding GOAL 1.**

We would like you to review the project goals (e.g., Goal 1 only) and work with your team to develop a road map or action plan that states the goal you have selected, how you will assess patients' and your

practice's performance, as well as collect and review patient data with the team to ensure everyone is working toward the Provider goal identified.

ACTION ITEM: Answer the questions below as a group for GOAL 1. Do not worry if it's not complete, this is a "preparation" worksheet designed to help guide you in developing your PDSA Plan for GOAL 1. You will/can make changes over time that are more aligned to your specific practice needs.

STEP 1: As you prepare and think about setting up your PDSA plan, there are a few things to consider and document. They are as follows:

1. Who is the team leader?
2. What staff members will you need to involve in this PDSA project?
3. What are the start and end dates of this PDSA project? *June 1st – August 13, 2021*
4. What are you going to call this project?

STEP 2: What is the practice goal you are focused on? For this exercise, GOAL 1 and the AIM statement has been created for you and noted below:

> **Goal:** To improve the documentation of obesity diagnosis in the EHR.

> **AIM Statement:** 80% of all patients with a BMI equal to or greater than 30 will have a diagnosis of obesity that is documented in the EHR by August 13, 2021.

STEP 3: Now, let us reflect on your practice to determine the path forward for planning and implementing GOAL 1.

1. **Is GOAL 1 being achieved in your practice?**
    a. If yes, what are you doing currently?
    b. If no, what are some possible reasons GOAL 1 is not being achieved?

2. **Discuss some possible solutions to help you achieve GOAL 1:**

3. **From the list of solutions (above), please pick one or two solutions that you may engage for your GOAL 1 PDSA cycle plan.** *Remember, you want to explain the possible solutions that will help you achieve this goal, why you chose these solutions, and what resources you will need to plan and implement this solution. Also, start thinking about what data you will need to collect to measure this solution and how you will measure success.*

4. **Out of the two solutions you identified to help you achieve GOAL 1, which one might you start with?**

5. *What data will you need to collect? Will you need the help of anyone in your practice to collect it? If so, who? How often will you collect the data and review?* *Given this PDSA Plan Cycle for Goal 1 is 10 weeks between June 1 and August 13, 2021, you may want to establish a data point check every 3rd week. This way you'll have 3 touchpoints to review data and progress.*

6. **Now it is time to think about implementing the solution you chose. What are the tools you need to implement the solution? What people do you need to engage to help you achieve this goal? How often will you meet with them?**

   a. What tools do you need?
   b. What people do you need to engage to achieve this goal?
   c. How often will you meet with them?