QI Basics

**Data Collection Plan**

The QI Data Collection Plan documents reasons, types, frequencies, and sources for the data identified to support quality improvement (QI) goals.

## Introduction

This data collection plan (grid) is filled out after your team has documented their goals and methods for improvements and is most frequently used in conjunction with the initial “Plan” step of the Plan-Do-Study-Act (PDSA) worksheet. It is also used in conjunction with the Measures Collection and Monitoring Plan. In some cases, your team may be collecting and analyzing data before the PDSA “Plan” step to understand a process better and/or narrow in on specific issues that your team will address and propose solutions for. If you intend to use and analyze data that is already collected, your use of the data collection plan may be different, such as documenting needs for stratifying or specific drilling down into the data to identify more granular contributors to a higher level measure.

## How to Use

This tool should be completed by the project team, ensuring input and review by the data analyst or data expert(s) on your team. If you are using this tool in conjunction with the Measures Collection and Monitoring Plan, you should note which measure the data support which you are documenting in the fields in this tool.

* **Data to be Collected:** Identify the specific data the team intends to collect.
* **Type of Data:** Describe attributes of the data such as whether it is qualitative or quantitative, etc.
* **Purpose of Collection:** Explain the reasons for data collection and analysis
* **Source:** Name the systems and/or origins of the data. For example, it may be coming from the EHR, surveys, tally sheets/counts from process observers, etc.
* **Frequency:** Document how often the data will be collected.
* **Who:** Include specific names of team members who are responsible for collecting data.
* **Stratification Factors (optional):** Document any need for collecting data at a more detailed level (by name, department, time factors, etc.) that will assist in analysis.
* **Operational Definition (optional):** Document additional detail to beyond the Data to be Collected field by adding a definition that may be universally used in your organization, by your EHR, etc.

An [example](#_Example_QI_Data) QI Data Collection Plan is provided at the end of this document for your reference.

## QI Data Collection Plan

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| **Data to be collected** | **Type of Data** | **Purpose of collection** | **Source** | **Frequency** | **Who** | **Stratification Factors** | **Operational Definition** |
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## Example QI Data Collection Plan

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| **Data to be collected** | **Type of Data** | **Purpose of collection** | **Source** | **Frequency** | **Who** | **Stratification Factors** | **Operational Definition** |
| Fields related to the NQF 0018 measure | Discrete data | National reporting requirements and QI project | EHR system | Clinical data is entered during patient encounters and can be pulled as needed | IT or EHR super-user | Stratify at the provider or clinician level | Note: read the detailed description of NQF0018 to understand specifics of numerator and denominator |
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