**Shadowing Preparation Checklist**

It is important to think through the logistics involved with shadowing and plan accordingly. These points are designed to aid preparation.

**Pre-shadowing work**

* Identify the defined pathway or part pathway to be shadowed i.e. where does it start and end?
* Why has shadowing been requested and by whom?
* Map the flow of the current care experience (see Care Experience Flow Map)
* What is hoped to be learned by shadowing (outcome)?
* Identify who the lead person is in the Division who will be responsible for ensure action is taken.
* Determine whether there are any exclusion criteria that need to be applied when identifying suitable patients.
* How many patients are you going to shadow?
* Consider shadowing patients at different times or days to see if there is any difference in experience.
* Identify who is going to undertake the shadowing? It is worth using several people as this gives different perspectives. (See who can Shadow?)

**Logistics**

* What is the ideal day/time to start shadowing? You need to consider appointment dates/ times and eligible patients.
* Make contact with the patient (and families if appropriate) to obtain permission to shadow them. Confirm arrangements for meeting them on the day of shadowing and leave them with your contact details (see the sample script for requesting shadowing).
* Inform staff within the area that the shadowing is taking place of the arrangements for the day; provide staff with your contact details.
* Familiarise yourself with the area that the shadowing is to take place.

**Preparation for Reporting**

* How and when are the results of the shadowing and recommendations to be presented?
* Is a time study required?

Adapted from: DiGioia III, A.M (2010) *Go Shadow* Patient and Family Centered Care Innovation Center of UPMC