



6. Meet the patient and briefly reiterate what shadowing involves if time has passed since your first contact. Introduce yourself to staff in the areas(s) where you will be shadowing, at the time - not in advance - to ensure there are no special preparations or adjustments made
7. Observe and record the experience, noting each step in the care pathway, the care-givers with whom the patient comes into contact and the interaction. Note the duration of each step in the care pathway and jot down first-hand comments and questions raised by care-givers and/or the patient
8. Report findings to your project team and senior staff of the area in which the shadowing took place, with the goal of improving Patient Experience, staff satisfaction and efficiency. You may also like to produce a process map to illustrate the shadowed section(s) of the patient's journey

## Patient Experience Improvement Team - contact details

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## Patient Experience

### Silver module

#### Step-by-step guide to Shadowing





## What is Shadowing?

Shadowing is a method of following patients through one or more steps of their pathway, observing and noting each interaction and event that occurs.

The purpose is to feed back to staff about your observations and to identify elements that could be improved.

Patient shadowing is a real-time observational tool, which allows staff from all backgrounds, clinical and non clinical, to observe a care experience through the eyes of the patient.

It can be advantageous to shadow with a patient or public member, being mindful not to influence their perceptions, but being on hand to answer any queries they may have whilst carrying out your own observations.

Feeding back shadowing results to staff, helps staff to see what is currently working well and what elements require improvement.

Small changes can make the biggest difference to patients and are usually easy to implement. Shadowing gives staff the opportunity to identify where they can make these small, but valuable improvements.

## Considerations

Think about whether shadowing would work for your project. Would it be advantageous for your project, for you to gain an in-depth understanding of a patient's journey?



If so, you might like to consider shadowing with another member of staff, a volunteer, or even a public member, to gain different perspectives on interactions and events. If this is something you would like to pursue, please make contact with one of the following people:

**Sarah Brown** - Voluntary Services Manager [sarah.brown33@nhs.net](mailto:sarah.brown33@nhs.net)

**Natasha Judge** - Corporate Governance Manager (Foundation Trust membership) [natasha.judge@nhs.net](mailto:natasha.judge@nhs.net)

## The 8 steps to Shadowing

1. Identify the step(s) along the patient pathway that are to be shadowed, such as the day of surgery, attending an Outpatient appointment or Pre-Assessment, for example
2. Select the 'shadower(s)'. This will most likely include you and if so, a member of the Patient Experience Improvement team will be able to advise and support you - please see back page for contact names
3. Staff involved in patient care on the pathway you wish to shadow, will be able to suggest patients who they feel would consent to being shadowed
4. Connect with the patient (and family, if appropriate), this could be by introducing yourself on the day, or in advance by telephone/email. Staff involved in the patient's care may prefer to introduce the concept of shadowing to the patient, in advance of you making contact
5. Explain the concept of shadowing to the patient (and carer or relative, if appropriate) and ask for their permission to shadow their experience. Note: document each step of the process, in particular the date that consent was obtained