

**The Patient And Family Centered Care  
Methodology And Practice**

# **Shadowing Field Journal**

**An On-the-Go Tool  
For Shadowers in the Field**



**READY... SET... GO SHADOW!**

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# GO SHADOW

## **SHADOWING FIELD JOURNAL**

An On-the-Go Tool for Shadowers in the Field

We hope you've read **Go Shadow - Your Guide to Patient and Family Shadowing** and now know that Shadowing is an essential step in the **Patient and Family Centered Care Methodology and Practice (PFCC M/P)**.



**Visit: [www.pfcc.org/go-shadow](http://www.pfcc.org/go-shadow)**

This **Shadowing Field Journal**, your companion to **Go Shadow**, takes the guess-work out of Shadowing and provides essential tools for on-the-go Shadowers to use while in the field with patients and families.

## This Shadowing Field Journal includes:



- Shadowing guidelines to help you get started
- 5 blank observation pages to help you capture all events, Touchpoints, and note Care Givers who shaped the patient's and family's Care Experience
- Care Experience Flow Map template
- Free and unlimited online Shadowing resources

Why “go it alone” if you don’t have to? This Shadowing Field Journal has everything you need to get started and keep going.

**READY...SET...GO SHADOW!**

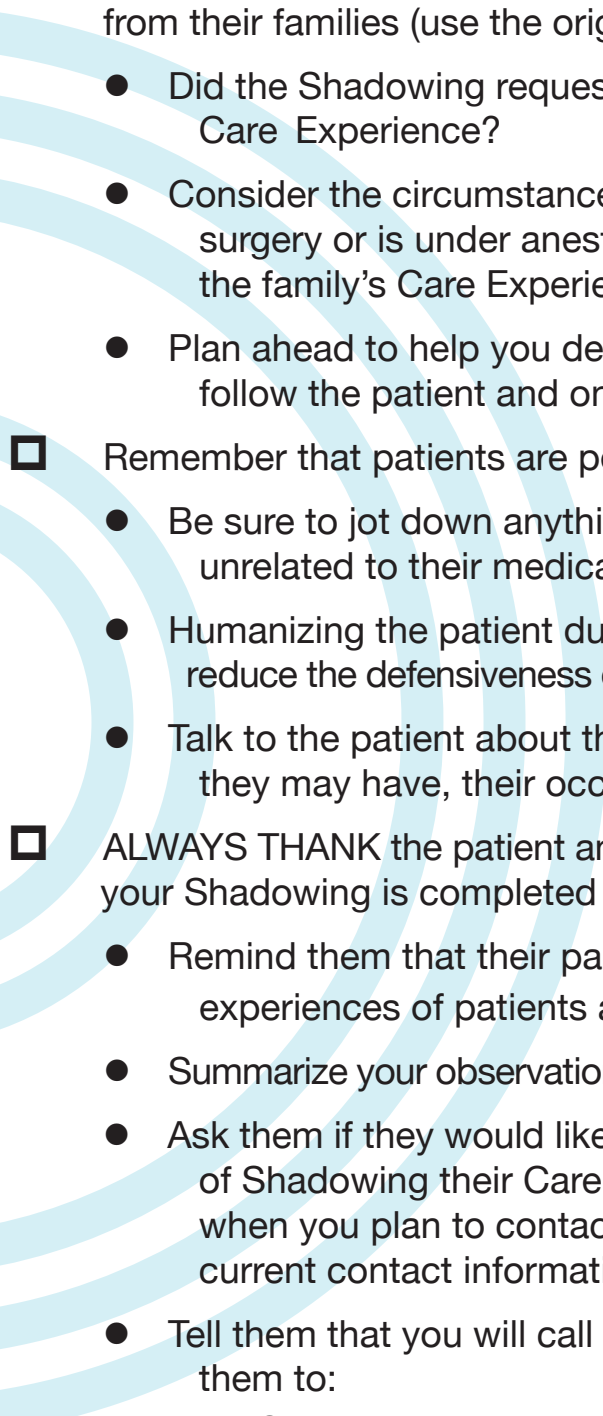


# GUIDELINES TO GET STARTED

## How to Shadow a Patient and Family

Shadowing a patient and family through their Care Experience requires just a little advance planning. Shadowing also requires that you follow certain procedures. Use this checklist to help you get started and keep you on track.

- ❑ Determine the best time(s) and day(s) to Shadow a patient in order to capture enough information
- ❑ Work with contact from Care Experience to identify a patient to Shadow
- ❑ Ask the patient and family for permission to Shadow them through their Care Experience, either in person or over the phone
  - Get the patient's and family's consent before Shadowing (see the Tools and Templates section at [www.pfcc.org/go-shadow](http://www.pfcc.org/go-shadow) for a sample script and suggested responses to Shadowing request denials)
- ❑ Approach the patient and family by introducing yourself--state your name, position, and the purpose of Shadowing
  - Explain why you are Shadowing and what you hope to accomplish
  - Describe the benefits of Shadowing
  - Relate that through Shadowing, you are involving the patient and family as partners in co-designing the ideal Care Experience
  - Stress the fact that you will merely be observing the Care Experience and recording information that will be kept confidential.
  - Explain that Shadowing will serve to improve the Care Experience for patients and families in the future
- ❑ THANK the patient and family if they grant you permission to Shadow
  - Reiterate the importance of their partnership
  - Encourage them to make comments, ask questions, and express concerns while you are Shadowing (no matter how trivial something may seem to them, if they notice it, others will, too!)
  - Remind patients and families that your purpose in Shadowing is to see the Care Experience through their eyes and to improve the Care Experience according to their needs
- ❑ Achieve a balance between observing and interacting
  - Converse with patients and families to help put them at ease and establish rapport
  - Ask the patient and family questions about their Care Experience

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- ❑ ASK patients for permission before you enter an exam room with them
    - If denied, tell them you where you will wait for them
    - If permission is granted, avoid recording the patient's personal health information
  - ❑ Decide which Care Experience you will Shadow if patients are separated from their families (use the original Shadowing request to guide you)
    - Did the Shadowing request focus more on the patient's or family's Care Experience?
    - Consider the circumstances: If, for example, a patient is going into surgery or is under anesthesia, you would choose to Shadow the family's Care Experience at that time
    - Plan ahead to help you decide whether to use two Shadowers: one to follow the patient and one to follow the family member(s)
  - ❑ Remember that patients are people too!
    - Be sure to jot down anything that you find interesting about the patient unrelated to their medical condition
    - Humanizing the patient during your Shadowing Report can help to reduce the defensiveness of Care Givers involved in the Care Experience
    - Talk to the patient about things like their favorite movie, any pets that they may have, their occupation, hometown, etc.
  - ❑ ALWAYS THANK the patient and family for allowing you to Shadow when your Shadowing is completed
    - Remind them that their participation will help to improve the experiences of patients and families in the future
    - Summarize your observations and ask them if they have anything to add
    - Ask them if they would like to hear about the changes made as a result of Shadowing their Care Experience. If so, let them know how and when you plan to contact them, and make sure you have their current contact information
    - Tell them that you will call them within one week of Shadowing, asking them to:
      - ◆ Share any last-minute thoughts about their Care Experience
      - ◆ Convey their suggested solutions to any problems they encountered
      - ◆ Tell you about their transition from the hospital to home
      - ◆ Let you know anything else they may have forgotten to mention

**\*\*\*HIPAA REMINDER!\*\*\***

Remember, you must adhere to the Health Insurance Portability and Accountability Act (HIPAA) privacy rules when documenting the Care Experience during Patient and Family Shadowing.

## Shadowing Cover Sheet

Date: \_\_\_\_\_

Care Experience to be Shadowed: \_\_\_\_\_

Begins: \_\_\_\_\_

Ends: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact Email: \_\_\_\_\_

Report Deadline: \_\_\_\_\_

















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Please visit [www.PFCC.org/  
go-shadow](http://www.PFCC.org/go-shadow) for additional re-  
sources including tools and  
templates to help you before,  
during and after you  
**Go Shadow!**



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