**Partnering with Patients Checklist**

***Partnering with people who use health services in the planning, design and delivery of healthcare services is an important way to improve quality and accountability in the system. To assist you in planning and preparing for partnering with patients and to guide your discussion we developed this checklist.***

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| 1. Discuss the main objectives of your project.  * At what stage are you in your project? * Planning * Implementation * Evaluation   *In order to achieve meaningful engagement, patient representatives need to be involved from the outset and throughout all the stages of the project.* |
| 1. Why do you want to engage patient representatives in this project? What would successful engagement look like? |
| 1. What input are you seeking from patient representatives?   Is it a:   * One time event * Short term (few meetings over a limited time, e.g. 3 to 6 months) * On-going (longer term commitment – up to one year) * On-going (longer terms commitment from one to three years)   *Some examples for consideration: membership of a steering or working group, focus group, survey, listening session. For Levels of Engagement please refer to the table at the end of the checklist.*  How will patient representatives be expected to participate?   * In person * Teleconference * Webinar |
| 1. How many patient representatives would you like to involve in your committee/project/initiative? *It is recommended to have more than one patient representative as part of a group or committee*. |
| 1. Consider any specific criteria for the selection of patient representatives that are relevant to your project. *For example, skills, past experience or other.* |
| 1. Discuss how you will recruit patient representatives. *For guidance please see link below.*   <https://www.hse.ie/eng/about/who/qid/person-family-engagement/resourcesqid/guidance-for-recruiting-patient-representatives-groups-committee.pdf> |
| 1. Who are the decision makers for your project and how will decisions be made? |
| 1. Are there specific objectives related to involvement of patient representatives in your work that need to be met? If yes, ensure that these are reflected in the Terms of Reference. |
| 1. Provide any relevant information to patient representatives in advance of meetings or throughout? *For example, Terms of Reference, background information on the project,* *the key dates planned in the work of your group/project/initiative, including dates and locations of meetings etc.*   *Please ensure that the information is provided in advance of any*  *meetings taking place and in accessible, easy to understand format.*  *Refer to Communicating Clearly Guidelines*  <https://www.hse.ie/eng/about/who/communications/communicatingclearly/> |
| 1. Will any training/briefing for patient representatives be required prior to the first meeting? |
| 1. Nominate someone on your group who could act as a “mentor” to patient representatives? *A mentor is someone who patient representatives could liaise with on an on-going basis and who could provide support to them.* |
| 1. Please note that you **must** cover travel expenses, as well as any out of pocket expenses incurred by patient representatives for the purposes of engagement. For more information on reimbursing expenses to patient representatives please see the following link: <http://hse.ie/eng/about/Who/QID/Person-Family-Engagement/ResourcesQID/Policy-for-the-reimbursement-of-service-user-expenses-2017.pdf> |

**Levels of Engagement**

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| **Level of Engagement** | **√** |
| * **Consulting** – getting feedback to help inform a decision or determine a direction to take. This level of engagement is required when we need to listen to the patient perspective to inform decision making at the stage where policies or programme decisions are still being shaped. |  |
| * **Involving** – working with patient representatives to ensure that the patient voice is understood and considered. A two way information exchange takes place and patient representatives have an interest in the issue and will be directly affected by the outcome. Involve level of engagement encourages discussion among all stakeholders. |  |
| * **Collaborating** – partnering with patient representatives in decision making. This level of engagement allows for patients to shape policy and programme decisions that affect them. There is opportunity for shared agenda setting and more flexible time frames for deliberation on issues. |  |

***If you have any questions regarding this checklist or for advice on partnering with patients please contact*** [***mila.whelan@hse.ie***](mailto:mila.whelan@hse.ie) ***or*** [***nicolaj.williams@hse.ie***](mailto:nicolaj.williams@hse.ie)