Capturing Patient and Carer Stories

1. Contact Patient and Carer
   Telephone / letter / in person prior to departure of facility.

2. Schedule Discussion
   Ensure patient/carer determines date, time and location of discussion.
   Schedule two staff to attend each discussion. Allow one hour for
   face to face with patient and carer.

3. Conduct Discussion
   Ensure a quiet and private space for discussions to maintain confidentiality.

4. Resources to take to Discussion
   - Identification
   - Mobile telephone (in silent mode)
   - Patient discussion record
   - Patient information sheet
   - Patient consent form
   - NCR+Picker patient centred dimensions of care pie graph
   - Information regarding how to lodge a complaint / compliment.

5. Analyse Results
   Write up the story in the patient and carer’s voice using as many direct
   quotes and phrases as possible. Enter information into analysis spreadsheet.
   Compile issues beyond scope of project in a spreadsheet with appropriate
   referral points and timeframes for follow up.

6. Provide Feedback
   Send thank you letter to patient/carer for their participation with a copy of
   their story for verification and/or editing. Enclose a reply paid envelope to
   facilitate the return of an amended story. Offer opportunity to receive
   further information on project or attend a project presentation.

7. Finalise
   Compile Patient & Carer Experience Report. Submit patient/carer story:
   Fax or scan & e-mail consent forms to Patient and Carer Team.

All tools/resources are available on ARCHI: www.archi.net.au

Checklist for Opening Discussion
- Introduce yourself (name, position, business unit, role)
- Thank participant for their time, honesty and willingness to speak with you
- Confirm that their information will assist in developing solutions to improving services
- Advise participant how their story will be used and privacy protected
- Provide overview of project and reiterate content of Patient Information Sheet
- Refer to contacts within the consent form if they have any questions or concerns
- Confirm their ability to withdraw their story at anytime by returning portion of consent form and their information will no longer be used
- Obtain written consent if not already received
- Ask if participant has any questions or concerns prior to conducting the discussion.

Checklist for Closing Discussion
- Thank the participant
- Explain the process of what will happen next and that a draft copy of the story will be
  sent to them for verification and/or editing
- Ensure participant has copy of consent form and Patient information sheet
- Ensure you have obtained a signed copy of consent form from participants prior to departure
- Ask if participant has any questions or concerns prior to concluding the discussion
- Notice and be sensitive to participant’s emotional state at conclusion of discussion

Practical Tips
- Take extra pens
- Take a clipboard to support you as you write
- Ask the participant if they have any pets and ensure it will be safe for staff to enter the
  participant’s residence
- Consider some staff may be affected by cigarette smoke and pets when making
  arrangements
- Choose attire that is professional and will not be intimidating to the participant.