

# 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.



All tools /  
resources are  
available on  
ARCHI  
[www.archi.net.au](http://www.archi.net.au)

## 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  
<http://www.archi.net.au/e-library/patientexperience>.

Fax or scan & e-mail consent forms to Patient and Carer Team.

### 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** 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