Capturing Patient and Carer Stories

1. Contact Patient and Care
   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
   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 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