



IRIS Verbal Consent

Considerations and Sample Script

This resource is designed to support IRIS Organizations in developing a consistent, client-centered approach to obtaining verbal consent. It includes key considerations to help organizations implement verbal consent in alignment with their internal policies, regulatory requirements, and IRIS Community Standards. These considerations address how verbal consent is integrated into workflows, documented, and communicated to clients in a clear and respectful way. The resource also provides a sample verbal consent script that organizations can adapt to fit their specific context, ensuring both compliance and ease of use in day-to-day practice.

VERBAL CONSENT CONSIDERATIONS

Workflow Design & Documentation Expectations

Organizations should have a clear verbal consent workflow that defines when and how consent is obtained, and where it is documented. This includes:

- When during the client interaction consent should be obtained (e.g., during intake, prior to sending a referral).
- What specific information should be documented (e.g., date/time, staff member, scope of consent, client understanding).
- Where consent is recorded (e.g., case management system, internal logs).

Plain-Language, Client-Centered Communication

Verbal consent should be obtained in language that is accessible and easy to understand. Staff should:

- Use clear explanations of what information will be shared and why.
- Emphasize the client's rights, including the ability to decline or revoke consent at any time.
- Confirm the client's understanding before proceeding.

Regulatory Alignment

Verbal consent practices should comply with relevant regulations, such as HIPAA, FERPA, and state-specific privacy laws. Organizations should:

- Understand when verbal consent is sufficient and when written consent may be required.
- Ensure their practices are reviewed by compliance or legal staff, if applicable.

Staff Readiness & Quality Assurance

To ensure consistent implementation:

- Train staff on the importance of verbal consent and how to deliver the script effectively.
- Use role-play or coaching to build comfort and consistency.
- Periodically audit verbal consent documentation to ensure accuracy and completeness.

SAMPLE SCRIPT

Introduction of IRIS to Caller

"Program Name" accepts referrals through an electronic referral communication system called IRIS. This helps community partners work together to connect people with the services they need. Would you like to hear more about how this works, or would you prefer to receive "Program Name's" contact information to reach out yourself?

[Caller agrees]

Great!

Verbal Consent

If you agree, we will securely share your information with "Program Name" so they can contact you.

As part of this process, your name, date of birth, and other personal details will be shared with "Program Name" and visible only to them, and the local IRIS Data Manager who maintains the system. Only your name and date of birth will be visible to other local IRIS programs, only used for identification purposes for any future referrals. All information is handled securely and used only to coordinate your referral.

The organizations involved in this referral may stay in touch with one another to track progress and make sure you get the support that you are looking for. That said, your participation is always your choice, and you can decide at any point whether or not to continue.

If you prefer not to have your information entered into IRIS, I can provide "Program Name's" contact details so you can reach out on your own. IRIS is not required to access services.

Would you like me to proceed with sending your referral through IRIS?