Informed Consent Conversation Preparation Checklist

NRP Education Session – march 2025

Author: Brett Phillips

2025

Table of Contents

[1. Review Study-Specific Materials 2](#_Toc191930178)

[2. Gather Essential Patient Information 2](#_Toc191930179)

[3. Ensure Logistical Readiness 2](#_Toc191930180)

[4. Prepare for the Discussion 2](#_Toc191930181)

[5. Confirm Regulatory and Institutional Compliance 2](#_Toc191930182)

[6. Mental and Professional Preparation 3](#_Toc191930183)

## 1. Review Study-Specific Materials

☐ Confirm you have the most up-to-date informed consent form (ICF).

☐ Review the protocol to ensure you understand key study details (e.g., purpose, procedures, risks, benefits).

☐ Verify the patient’s eligibility status based on inclusion/exclusion criteria.

☐ Prepare any supplemental materials (e.g., study brochures, lay summaries, visual aids).

## 2. Gather Essential Patient Information

☐ Review the patient’s medical history and relevant clinical data.

☐ Check for any prior discussions the patient has had about the study.

☐ Confirm language preference and whether an interpreter is needed.

☐ Identify any potential concerns or barriers the patient may have (e.g., time commitment, transportation, health literacy).

## 3. Ensure Logistical Readiness

☐ Verify you have a quiet, private space for the conversation.

☐ Confirm you have enough time for a thorough discussion without feeling rushed.

☐ Have a notepad or electronic device ready for documentation (if required).

☐ Bring extra copies of the consent form for the patient and their caregiver (if applicable).

## 4. Prepare for the Discussion

☐ Plan a clear and concise way to introduce the study and its purpose.

☐ Be ready to explain key study aspects in layman's terms.

☐ Anticipate common patient questions and prepare responses.

☐ Know how to discuss alternatives to participation, withdrawal options, and the voluntary nature of the study.

## 5. Confirm Regulatory and Institutional Compliance

☐ Ensure you are trained and authorized to obtain informed consent for this study.

☐ Verify the ICF has been IRB-approved and follows institutional guidelines.

☐ Confirm documentation requirements for consent (e.g., whether electronic or paper signatures are used).

☐ If applicable, ensure a witness is available if required by study protocol or institutional policy.

## 6. Mental and Professional Preparation

☐ Approach the conversation with empathy and patience.

☐ Be mindful of body language and tone of voice.

☐ Ensure you can convey all information without coercion or undue influence.

☐ Remember to encourage the patient to ask questions and take their time deciding.