**PHONE SCRIPT TEMPLATE FOR CALLING UHEALTH CONSENT TO CONTACT PARTICIPANTS**

Hello, my name is [insert your name] and I am with the University of Miami. I am trying to contact [insert patient name]. Is this [insert patient name]?

1. If “NO”: May I speak with [insert patient name]?
   1. If the patient is not available: Please have him/her call [insert your name] at [insert your contact phone number]. Thank you and have a great day. **End call**
2. If “YES” and talking to the patient: I am contacting you because you indicated in one of your UHealth clinic visits that researchers have permission to contact you if there are research/clinical studies for which you might qualify. I am calling from [insert Department/Division/PI’s name] to see if you would be interested in participating in a research study.
   1. If “NO”: Thanks for taking the phone call and have a great day. **End call**
   2. If “YES”: Is this a good time to talk?
      1. If “NO”: Please let me know what is the best time to call you again. **End call**
3. If it is a good time to talk: Would you like to see if you qualify for this study?
   1. If “NO”: Thanks for taking the phone call and have a great day. **End call**
   2. If “YES”: Use IRB approved phone script for Consent-To-Contact to describe the study to the participant and ask the list of eligibility questions.
4. Do you have any questions that I can answer? (Answer questions). Thanks for taking the phone call and have a great day. **End call**

**Possible Scenario to Respond to**

1. If participant would like more information on the Consent to Contact initiative, provide them with the phone number 305-243-8888 and the website [www.miamictsi.org/consent-to-contact](http://www.miamictsi.org/consent-to-contact).

1. If participant would like more information about other clinical trials/studies at the University of Miami, provide them with the phone number 305-243-8888 and web address <https://umiamihealth.org/clinical-trials>.
2. If participant no longer wants to be included in the list of people who are interested in being contacted for research studies, please let them know that we can change their contact for research status from “Yes” to “No”. But you must relay to the participant that it may take up to 10 business days to ensure their record is removed from any other study where they may be eligible to participate. Also, if they already spoke with another study team and are considering to participate in one of those studies, that study team may still call them back to get their final decision. And if at any point the participant wishes to change their status themselves, s/he may call 305-243-8888 or email [contactforresearch@miami.edu](mailto:contactforresearch@miami.edu).

**Action for the caller if they want to change their status from “yes” to “no”**:

1. You must note their request to change from “yes” to “no” in the REDCap form.
2. An automatic email will be sent to have their status changed from “yes” to “no” in EPIC.
3. Research IT (WORKFLOW) will need to remove their record from any other projects where their contact information may have been provided to study teams.