



# Meaningful Conversations About Privacy and Consent to Share Information: Key Steps to Having an Effective Conversation

## WORKSHEET FOR PEER SUPPORT SPECIALISTS

### Instructions:

Read the scenario below and use this worksheet to guide your conversation. You are able to practice on your own, but we recommend practicing with a colleague.

### Scenario:

- Your client Jonah has been receiving substance use treatment services at Blueridge Treatment Center.
- You want to introduce the concept of consent to share information because their social worker, Jeremy would like to coordinate care with other providers.

# Key Steps to Having an Effective Conversation

## ① Introduce Yourself and Build Rapport

Example statements and questions:

- Happy to see you again, Bill, how are you?
- My name is Joan, and I am a peer recovery support specialist. Can we take a few minutes to talk?

Put it in your own words:

“

”

## ② Introduce Consent to Share Information

Example statements and questions:

- I'd like to share with you some information about your substance use treatment and privacy.
- I'm working with all of my clients to make sure they know their options related to consenting to share their treatment information.

Put it in your own words:

“

”

## ③ Ask For Permission

Example statements and questions:

- Can we take a few minutes to talk about this before you meet with your social worker?
- I'd like to explain some of your options. Is that OK with you?

Put it in your own words:

“

”

## 4 Provide Education

Example statements and questions:

- You will be asked to sign a consent to share your treatment information.
- The decision to share is entirely up to you.
- There are 3 key decisions:
  - Who do you want to share info with?
    - One provider, a couple of providers, all providers.
    - Health Insurance Plan (payment).
    - No one.
  - What information can be shared?
  - For how long?

Put it in your own words:

“

”

## 5 Check In with the Client

Example statements and questions:

- What questions or concerns do you have?
- How can I support you in making this decision?
- Summarize what has been discussed and check-in to see if correct.

Put it in your own words:

“

”

## 6 Close Conversation

Example statements and questions:

- It was great talking to you about this, your social worker will be able to answer any questions you have.
- I am available to support you in talking to your clinical provider.
- This is your decision, and I support whatever you decide.
- There is no pressure to make the decision today.

Put it in your own words:

“

”

# Communication Skills



## Open-Ended Questions

What does this mean?

Open-ended questions encourage the client to direct and focus the conversation on their own needs in relation to the topic being discussed, and encourage them to do most of the talking. They do not invite brief answers and are usually NOT answered with a “yes”, “no” or a specific one-word answer.

What you can say:

- What are your thoughts about this updated policy or protocol?
- What information do you need in order to make this decision?
- How can I be most helpful?
- What might be some of the benefits of sharing this information with your medical providers?
- What is your biggest concern?



## Affirmations

What does this mean?

Affirmations are statements that acknowledge and validate a client's strengths, efforts, experiences and involves the peer noticing, recognizing and acknowledging the positive.

What you can say:

- You are really “weighing” all of your options and thinking about this carefully.
- Making a decision about sharing information is complicated, you are so thoughtful.
- Your questions are really important and taking time to think about this makes good sense.
- Your overall health is key in your decision, it's obvious.



## Reflective Listening

What does this mean?

Reflective listening is when you repeat back to the client what they have said. This includes both the content, and the feeling and meaning expressed by the client. Reflective statements can capture just content, just emotion or a combination of both.

What you can say:

- You seem very concerned about “who else” other than medical providers might get this information.
- Sounds like you understand the benefits of sharing this information with others on your medical “team”.
- I hear you saying that you understand the benefits and at the same time you’re concerned.
- You are very concerned about your confidentiality.



## Summarizing

What does this mean?

Summarizing is when you repeat back to a client the key pieces of your session by linking together highlights from your conversation – that can include your client’s goals and priorities, reasons why they are important to them, past experiences, concerns, and challenges, and any key actions they would like to take.

What you can say:

Let’s recap. You came to the clinic today to see your SUD provider and we were able to spend some time talking about the consent process for sharing information with other medical sites who provide you with medical care. On one hand, you understand the benefits of coordinated care and you also have concerns about your confidentiality. Does that sound right?