

SAS ADVOCATES | PRACTICAL RESOURCE

First Conversation and Signposting Planner

Structure the first contact around safety, purpose, consent and a clear next step.

What this resource contains

- Role and confidentiality prompts
- Writing space for decisions or review
- Independent source and boundary safeguards

IMPORTANT

Independent general guidance. It does not replace clinical, employment, regulatory, immigration or legal advice. Do not include patient-identifiable or unnecessary colleague-identifiable information in worksheets.

Author: Dr N Aziz

Published and reviewed: 7 September 2026

ROLE BOUNDARY

The SAS Advocate supports, navigates, signposts and raises organisational themes. The role does not replace treatment, union representation, formal investigation or legal advice.

Opening

Explain role and limits

Check immediate safety

Clarify the doctor's purpose

Identify deadlines and existing processes

Needs map

Health or treatment

Employment or contract

Patient safety or speaking up

Equality or discrimination

Medicolegal or regulatory

Practical and peer support

Closing

Agreed next action

Who owns it

What may be shared and with whom

Review date

What to do if risk worsens

Source and confidentiality note

The role was developed through SAS contract reform. Local remit, coverage, line management and resources vary. Check the current joint BMA/NHS Employers SAS Advocate guidance and local agreement.

CONFIDENTIALITY

Explain role, records, access, aggregate reporting and limits before inviting detailed disclosure. Do not include patient identifiers or case details that could identify a doctor through specialty, site, grade or timing.

[Open the joint SAS Advocate guidance](#)