

SAS ADVOCATES | PRACTICAL RESOURCE

SAS Advocate Role, Boundaries and Confidentiality Handbook

A concise operating reference for safe, credible advocacy.

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.

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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.

Role purpose

Accessible first contact

Active signposting

Organisational themes

Influence with senior leadership

Boundary check

Support versus management

Navigation versus representation

Theme reporting versus case disclosure

Advocacy versus investigation

Confidentiality protocol

Explain records before disclosure

Obtain consent where possible

Share minimum necessary information

Escalate serious risk proportionately

Manage dual roles and conflicts

Supervision and review

Protected time

Secure systems

Access to advice

Annual objectives

SAS doctor feedback

Succession planning

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](#)