SENSITIVE APPOINTMENT BRIEFING TEMPLATE

This template supports NHS service managers and their teams to prepare interpreters effectively for sensitive or complex healthcare appointments. It ensures that interpreters are briefed with the necessary logistical, contextual and communication information while maintaining patient confidentiality.

Maintain patient confidentiality.

SECTION 1 – APPOINTMENT DETAILS

Date and time of appointment:	
Type of appointment: (for example, mental health review, oncology consultation, safeguarding discussion)	
Mode of delivery:	☐ In person ☐ Telephone ☐ Video conference
Purpose of the meeting: (briefly describe the appointment goal or key outcomes)	
Key participants: (clinicians, patient, family members, support workers)	

SECTION 2 – PATIENT COMMUNICATION CONSIDERATIONS

Language and dialect required:	
Interpreter gender preference:	
Relevant cultural or religious sensitivities:	
Known triggers or emotional factors:	
Preferred communication style: (for example, slower speech, visual aids, plain language)	

SECTION 3 – BRIEFING OVERVIEW FOR THE INTERPRETER

Meeting formality: (formal clinical review, informal discussion, community support meeting)	
Expected tone and terminology: (include medical terms or topics that may arise)	
Sensitive topics: (for example, end of life discussions, safeguarding, mental health, bereavement)	
Written documents or medical reports to be discussed: (attach or describe these)	
Expected outcomes: (for example, confirming consent, explaining a treatment plan, summarising diagnosis understanding)	

Section 4 – Meeting Logistics

For in person appointments	
Location: Full address and building details.	
Access guidance: Such as reporting to reception or security.	
Room layout: Including privacy accommodation.	
Emergency protocols: If the patient becomes distressed or a safeguarding issue arises.	
Post-session feedback: Outline how feedback will be shared post session.	

For telephone interpreting	
Teleconferencing details: Including an PIN details to access the call.	
Key background information: Anything essential you need to share before the call.	
Tone, pacing and turn-taking expectations:	
Timings on the call: Reminding all parties to pause regularly and speak clearly.	

For video conference interpreting	
Video conferencing platform and meeting details: For example, Microsoft Teams or Zoom, including sharing the meeting link.	
Technical setup: For audio, camera and shared screens.	
Turn taking protocols: Use of verbal cues or hand signals.	
Visual materials: List any presentations or forms you have shared in advance.	
Troubleshooting process: Agree a method for reporting connectivity or sound problems.	

SECTION 5 – COMPLIANCE AND ESCALATION

Escalation contact name and procedure:	
Interpreter debrief time and method:	
Safeguarding reporting route:	

MANAGER COMPLETING FORM

Name: _____

Position: _____

Date completed: _____