

Preparation & Screening Guide

Prepare for a meeting, review or inspection without hiding the gaps.

For: People preparing for professional scrutiny, formal meetings or service reviews.

1. Confirm the purpose

- Confirm who is attending, what the meeting or review covers and which decisions may be made.
- Check the required format, submission dates and applicable requirements with the relevant body or professional.

2. Organise the pack

- Prepare a concise summary, an indexed chronology and a source list. Make source references easy to follow.
- Use authorised working copies. Identify versions, missing pages, access restrictions and material you have not checked.

3. Test the account

- Ask which statements you can support and which remain disputed. Record the strongest evidence against your preferred explanation.
- Prepare neutral answers to difficult questions. Say 'I do not know' when the record cannot support an answer.

4. Prepare the conversation

- List questions, corrections and decisions you need clarified. Arrange any agreed access or communication support.
- Agree who will take notes. At the close, confirm decisions, owners, deadlines and unresolved points.

5. Check the written record

- Compare the meeting record with your notes. Raise factual corrections through the appropriate route.
- Keep the original record and any correction request. Track agreed follow-up and completion evidence.

Check your preparation

Use this checklist before sharing the pack or making the next decision. Record unresolved items; do not tick them off by assumption.

- ☐ Purpose, attendees and deadlines are confirmed.
- ☐ The current pack is indexed and versioned.
- ☐ Important assertions have source references.
- ☐ Contradictions and missing material are included.
- ☐ Questions and requested clarifications are written down.
- ☐ Support and note-taking arrangements are agreed.
- ☐ Decisions and follow-up responsibilities will be recorded.

Editable templates included

Meeting and review preparation: Item, Question or requirement, Evidence or source reference, Ready: yes/no/partial, Gap or correction, Action needed, Owner, Due date

Meeting decisions and actions: Item ID, Question discussed, Decision or unresolved point, Source or meeting reference, Action agreed, Owner, Deadline, Correction required, Follow-up evidence, Status

How to use the templates

Open the CSV file in Excel, Google Sheets or another spreadsheet app. Keep one item per row. Use a clear source reference and mark uncertainty. Save a dated working version; preserve the original material separately.

Scope and boundaries

These are general preparation tools. They do not certify compliance, decide legal merits or replace clinical, safeguarding or professional judgement. Use the appropriate authorised route for urgent risk. Only collect and share material you may lawfully access.

When independent support adds value

Supported preparation can help organise the pack and test gaps before scrutiny. It does not guarantee an inspection or hearing outcome.

Download this kit and its editable files at <https://orvia.org.uk/resources/preparation-guide>

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