

A one day workshop from The At Work Partnership in association with the journal *Occupational Health [at Work]*

# TRAINING



## OH report writing

Preparing management reports from OH referrals

**A one day workshop**

**Manchester – Friday 24 March 2017**

**Belfast – Friday 28 April 2017**

**London – Monday 15 May 2017**

How to prepare concise, well-written OH reports that will provide quality information for managers, be understood by employees, and be defensible if the information contained in them is ever required in legal proceedings.

**CPD:**  
Self-certification  
schemes:  
5½ hours

Additional CPD can be  
gained after the event  
via our CPD scheme.



Quality  
conferences  
at value for  
money prices

### Course tutors:

Sandra Winters, Organisational Wellbeing Ltd

Prof Diana Kloss, barrister

Nick Hanning, Dutton Gregory LLP

Dr Nerys Williams, independent OH Physician

### Recent delegates at this workshop said:

*“Would definitely recommend – very useful and enlightening”*

Maudie McHardy, OH Nurse Manager, The Dudley Group NHS Foundation Trust

*“Excellent, informative and very up-to-date”*

Dr Jacques Tamin, independent OH Physician

*“Excellent – useful, relevant, succinct, facilitating improved standards and quality in OH reports”*

Lynne Whitmore, OH Adviser

*“Fantastic update, excellent documentation, most informative, structured course that I have attended in years”*

Carmela Tucker, OH Advisor, SOH vanilla Limited

### SPECIAL OFFERS

Book and pay 6 weeks  
before the training and  
save **£50 +VAT!**

Self-funded  
delegates from  
only **£235 + VAT!**

# Programme

## 9.00 Registration

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## 9.20 Welcome and introduction

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## 9.30 Setting and meeting management and employee expectations for OH reports

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*Sandra Winters, Organisational Wellbeing Ltd*

- What is the report for?
- What information should it contain?
- What it should not contain
- What makes a good report?
- Establishing a service-level agreement
- What makes a good case referral? Advising managers on good practice
- Ensuring the worker's consent for the referral

## 10.30 Tea

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## 10.45 Ensuring the legal and ethical compliance of your organisation's OH reports

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London and Manchester workshops:  
*Prof Diana Kloss, barrister*

Belfast workshop:  
*Nick Hanning, Dutton Gregory LLP*

- Importance of record keeping
- Consent and confidentiality
  - including timescale for consent and if the employee refuses consent
- GMC and FOM guidance
- Special issues for OH nurses and OH physicians
- Complying with data protection principles and the *Equality Act*
- OH reports as evidence in employment tribunals and personal injury cases
- Court orders – releasing records in legal cases
- Defending your report in the tribunal

## 12.15 Legal Q&A

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Your opportunity to ask questions about OH reports and the law

## 12.30 Lunch

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## 1.15 The OH consultation and records

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*Dr Nerys Williams, independent OH Physician*

- Setting up the consultation
- Practical issues – including consent to the OH assessment
- History taking and forming an opinion
- What if the employee disagrees?

## 2.00 Effective OH reports

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*Dr Nerys Williams, independent OH Physician*

- Content, language and terminology
- Key phrases to use or avoid
- Time management
- Standard forms and templates
- Obtaining consent to release the report to the employer

## 2.50 Tea

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## 3.05 Practical session – writing effective reports in practice

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*Sandra Winters and Dr Nerys Williams*

This interactive session is designed to bring together all the skills that you have learnt during the day, so that you can see how they can be applied in your own practice.

## 4.05 Audit, quality control and maximising the usefulness of OH reports

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*Dr Nerys Williams, independent OH Physician*

- Auditing your OH reports
- Using records to identify wider OH issues
- Importance of getting OH reports right

## 4.25 Final questions

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## 4.30 End of day

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The programme timings given are for the London and Manchester events. The Belfast event will start and finish 10 minutes earlier than the given times.

## About The At Work Partnership

Dedicated to bringing high quality, good value conferences and courses to OH and allied health professionals, H&S and HR managers, **The At Work Partnership** researches the subjects that really matter to professionals in your field, and sources speakers who are true subject experts. We ensure that each conference is of the highest quality, and provide you with useful documentation, highlighting resources for additional learning. **All delegates receive a Certificate of Attendance and can gain additional CPD by participating in further learning after the conference/course, via the At Work Partnership's CPD scheme.**

We also publish the journal *Occupational Health [at Work]* as well as a new online service, *OH Law Online*, and we produce two free OH email newsletters, one focusing on OH law, and the other on general OH news. Visit [www.atworkpartnership.co.uk](http://www.atworkpartnership.co.uk) to get your copies and find out more.

# OH report writing – Preparing management reports from OH referrals

Preparing high quality OH reports is one of the most important tasks that occupational health professionals undertake. This workshop has been put together by **The At Work Partnership** to help OH practitioners produce, concise, well-written OH reports that:

- provide quality information for managers – and can be understood by employees
- and will be defensible if the information contained in them is ever required in legal proceedings.

## This training is designed for:

- Occupational health nurses • Occupational physicians
- Allied professionals working in OH

## How will attending this training benefit you?

- Learn how to write concise, robust OH reports that will stand up to scrutiny in a court or an employment tribunal
- Gain an understanding of the whole process of report writing – from the initial referral to the final report – in order to maximise the usefulness of the report to management
- Enhance your report writing style – do's and don'ts of report writing in practice
- Improve your ability to identify the type and quantity of information required to produce reports of the highest standards
- Understand how to audit and improve your clinical record keeping and reports
- Receive detailed, clear documentation to help you when you are writing your OH reports

## Course outline

This workshop covers the preparation of occupational health reports for management, following the OH referral. It will cover practice issues such as sickness absence, likely return to work, disability and case management. The course follows the principles on confidentiality and medical reports established in guidance published by the General Medical Council, the Faculty of Occupational Medicine and the Office for the Information Commissioner, and will help inform evidence for SEQOHS accreditation/re-accreditation. The At Work Partnership takes the view that these guidance principles apply to all health professionals working in an OH setting.

The training follows six key stepping stones to excellence in OH report writing:



**Attend this training workshop to ensure that your OH reports provide management with the information that they require, and meet all your legal obligations.**

*NB The course is not intended to cover reports carried out for statutory health surveillance.*

## About our expert tutors

### Sandra Winters

Sandra Winters was previously the head of health and wellbeing for NHS England and is currently the managing director of Organisational Wellbeing Limited. She is a nurse consultant in occupational health, and specialises in strategic development of workplace health and wellbeing. Her previous experience encompasses NHS acute healthcare settings, local authority, education – as senior lecturer within OH at Sheffield University – and manufacturing. Sandra has led and achieved SEQOHS accreditation for two NHS Trusts.

### Dr Nerys Williams

Nerys is an independent occupational physician, and is also currently a non-executive director of a large mental health trust, a GMC examiner and performance assessor and clinical advisor to other professional regulators. Nerys is the former principal occupational physician and deputy director (wellbeing) for the Department for Work and Pensions, where she had a strategy and health policy role around working age health, and she is a former Head of the Employment Medical Advisory Service at the HSE.

### Prof Diana Kloss

Diana is a barrister, former employment judge and honorary senior lecturer in OH Law at the University of Manchester. Her publications include *Occupational Health Law* (5th edition, Wiley Blackwell, 2010), and *Discrimination Law and OH Practice* for The At Work Partnership. She is an honorary fellow of the Faculty of Occupational Medicine, an ACAS arbitrator, and in 2009, was awarded an MBE. Diana is chair of the Council for Work and Health and is a visiting professor at London South Bank University.

### Nick Hanning

Nick Hanning is a partner, personal injury and employment lawyer with Dutton Gregory LLP where he specialises in psychiatric injury claims, especially those involving bullying and harassment or occupational stress. Nick acted for the claimant in the seminal case of *Majrowski v Guy's and St Thomas's NHS Trust*, and in a separate case that resulted in the largest ever employment tribunal award of £4.5 million. Nick is a past president of the Chartered Institute of Legal Executives.

# Booking Form

## OH Report Writing

### I would like to attend the following:

**Manchester** – Friday 24 March 2017  **Belfast** – Friday 28 April 2017  **London** – Monday 15 May 2017

#### Main rate

##### Early bird rate – save £50!

For bookings paid **6 weeks before the workshop commences\***

£319 + VAT (£382.80) per delegate – **save £50!**

##### Standard rate

For bookings paid **after early bird cut off date\***

£369 + VAT (£442.80) per delegate

#### Self-funded rate

##### Early bird rate – save £65!

For bookings paid **6 weeks before the workshop commences\***

£235 + VAT (£282.00) per delegate

##### Standard rate

For bookings paid **after early bird cut off date\***

£300 + VAT (£360.00) per delegate

The self-funded rate is for self-employed delegates making payment by personal cheque or credit card

Title	First name	Surname
e-mail		
Position		
Organisation		
Address		
Postcode		
Tel	Fax	

A 10% discount is offered to organisations booking 3 or more delegates on the same workshop. Please email [info@atworkpartnership.co.uk](mailto:info@atworkpartnership.co.uk) or please call us for details

**I have read and agree to the cancellation terms:** Authorised signature \_\_\_\_\_  
(This booking is not valid unless signed)

## Administration

### Venue

The conference will be held at training centres in central London, Manchester and Belfast. Details will be confirmed in your administration details.

### Bookings

Places can be booked by post, telephone, fax or e-mail. In cases where your organisation's paperwork may take a couple of weeks to reach us, please telephone us on 0345 017 6986 or 0208 344 2328 to reserve a no-obligation provisional place.

### Conference administration details

Please contact us if you do not receive written confirmation of your booking within two weeks of making the reservation. Details of the venue, a map and any final information will be sent to paid delegates approximately two weeks before the conference. If you have not received these one week before the event, please telephone us on 0345 017 6986, or e-mail [conferences@atworkpartnership.co.uk](mailto:conferences@atworkpartnership.co.uk)

### Cancellation policy

For cancellations received in writing 14 days before the workshop, we will provide a refund, less a 25% administration fee to cover administration costs. If the cancellation is received within 14 days of the workshop, no refund will be made, but we will accept an alternative delegate from your organisation at the event. Refunds are not available to delegates who fail to attend after confirming a booking.

### Hotel accommodation

Hotel accommodation can be arranged through Venuehunt.  
Tel: 01722 500675. Online: [www.venuehunt.co.uk](http://www.venuehunt.co.uk)

### Special requirements

If you have any special needs, please let us know in advance and we will be delighted to try and help.

### Payment information

**Main Rate: £369 + VAT per delegate. Early Bird Rate (EBR): £319 + VAT per delegate.**

**\*To qualify for the Early Bird Rate, payment needs to be made by the following dates:**

Manchester workshop: 10 February 2017

Belfast workshop: 15 March 2017

London workshop: 31 March 2017

Bookings unpaid at these times will be charged at the higher rate.

The discounted rate for self-funded delegates is for self-employed delegates. Payment must be made by personal cheque or personal credit card.

**Places are limited.**

**Documentation, refreshments and a buffet lunch are all included in the price.**

**The fee must be paid in advance of the event.** Invoices will be sent when a booking is received, and payment can be made:

- **By cheque** – payable to The At Work Partnership Ltd
- **By BACS** – please contact us for our bank account details.
- **By credit card** – Expiry date \_\_\_\_ / \_\_\_\_ 3 digit security number \_\_\_\_  
Card No. \_\_\_\_ / \_\_\_\_ / \_\_\_\_ / \_\_\_\_

*In order to process this booking, your details will be held on our system. We would like to keep you informed of future relevant events and information from The At Work Partnership by post, phone, fax or e-mail. Please contact us if you do not want to be kept up-to-date with this information.*

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**This programme was correct at time of going to press. In unavoidable circumstances, we reserve the right to change or cancel this event.** If we do need to cancel this event, our liability is limited to a refund of fees.

## BOOK NOW and return your completed form to:

17/04 17/05 17/06

**Post:** The Registration Secretary, The At Work Partnership Ltd, 3 Woodfield Way, Bounds Green, London N11 2NP

**Telephone:** 0345 017 6986 or 0208 344 2328 **e-mail:** [conferences@atworkpartnership.co.uk](mailto:conferences@atworkpartnership.co.uk)

Book online now at [www.atworkpartnership.co.uk](http://www.atworkpartnership.co.uk)