

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 virtual event**

**Thursday 3 February 2022**

**Friday 25 March 2022**

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.

**Course tutors:**

Sandra Winters, Organisational Wellbeing Ltd

Prof Diana Kloss, barrister

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 workshop with many practical suggestions delivered in a very accessible, but also challenging way"*

Dr Kent Haworth, Independent Consultant 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 by 5/1/22  
and save  
up to **£75 +VAT!**  
Self-funded delegates  
from **£205 + VAT!**



Quality  
conferences  
at value for  
money prices

# Programme

## 8.55 Registration

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## 9.00 Welcome and introduction

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## 9.10 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

## 10.10 Tea

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

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*Prof Diana Kloss, barrister*

- Importance of record keeping
- Complying with data protection principles in the *Data Protection Act*, the *General Data Protection Regulation* and the *Equality Act*
- 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
- OH reports as evidence in employment tribunals and personal injury cases
- Court orders – releasing records in legal cases
- Defending your report in the tribunal

## 11.55 Legal Q&A

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Your opportunity to ask questions about OH reports and the law

## 12.15 Lunch

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## 1.10 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?

## 2.05 5 minute break

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## 2.10 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

## 3.10 Tea

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## 3.25 Effective OH reports practical work

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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
- Importance of getting OH reports right

## 4.25 Final questions

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## 4.30 End of day

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## 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 an 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
- 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
- Other professionally registered practitioners 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
- Find out how to comply with the latest legislation, including the *General Data Protection Regulation* and *Data Protection Act*
- 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 is managing director of Organisational Wellbeing Limited, and was previously head of health and wellbeing for NHS England. She is a nurse consultant in occupational health, and specialises in the strategic development of workplace health and wellbeing. Her previous experience encompasses NHS acute healthcare settings, local authority, education and manufacturing. Sandra has led and achieved SEQOHS accreditation for two NHS Trusts. She is president of the Faculty of Occupational Health Nursing.

### Dr Nerys Williams

Nerys is a specialist in occupational medicine and has worked in public and private sector occupational health roles for over 20 years. She is a former deputy director of health and wellbeing at the Department for Work and Pensions (DWP) and a non executive director in one of the largest NHS mental health trusts in the country. She has extensive audit experience and is the current clinical appraisal lead for the Society of Occupational Medicine.

### 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* (6th edition, Wiley Blackwell, 2020), 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 honorary president of the Council for Work and Health and is a visiting professor at London South Bank University.

# Booking Form

## OH Report Writing – 3 Feb 2022 or 25 March 2022



A B C D E F G

I would like to attend the following:

Thursday 3 February 2022  Friday 25 March 2022

### First delegate

**Early bird (EB):** for bookings paid **before** 5 January 2022

£275 + VAT (£330) per delegate – **save £75!**

**Main rate:** for bookings paid **after** early bird closing date

£350 + VAT (£420) per delegate

### Second delegate – save £50

**Early bird (EB):** for bookings paid **before** 5 January 2022

£225 + VAT (£270.00) per delegate

**Main rate:** for bookings paid **after** early bird closing date

£300 + VAT (£360) per delegate

Title  First name

Surname

Position

e-mail

Tel

Organisation

Address

VAT No. for overseas orders only

**Printed documentation:** Printed documentation will be posted to arrive with paid delegates 4 days before the event.

What is your preferred address for receipt of this documentation?

My work/main address above  Alternative address below:

**Self-funded delegates:**  £205 + VAT (£246) if paid by 5 Jan 2022  £280 + VAT (£336) if paid **after** early bird closing date  
*(Rate applies to sole traders or when your employer does NOT fund your fee)*

To process your order, we keep your details securely on our database and we NEVER pass on your details to 3rd parties. We'd like to keep you updated about relevant events and information from the At Work Partnership. You can unsubscribe at any time by emailing [info@atworkpartnership.co.uk](mailto:info@atworkpartnership.co.uk). To receive our updates, please tick the boxes below:

- Yes – update via **post, email and phone**.
- Yes – by **post** (for training info and journal samples – usually 5x per annum).
- Yes – by **email** (for the free monthly OH email newsletter).
- Yes – by **phone** (we are very unlikely to call unless it is for a specific reason)
- No, please do NOT contact me via any method.

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

## Administration

### Venue

The event will be held on Zoom. Details will be sent in your administration details.

### Bookings

Places can be booked by post, telephone or e-mail. In cases where your organisation's paperwork may take a couple of weeks to reach us, please telephone us on 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. Zoom links will be sent to paid delegates approximately one week before the event. If you have not received these 3 days before the event, please telephone us on 0208 344 2328, or e-mail [conferences@atworkpartnership.co.uk](mailto:conferences@atworkpartnership.co.uk)

### Cancellation policy

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

### Printed documentation

Printed documentation will be posted to arrive with paid delegates 3 working days before the event. Please provide a home address/preferred address above for receipt of this documentation.

### Zoom

If necessary, we can arrange rental of laptop/iPad for a small additional fee.

### 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: £350 + VAT per delegate. Early Bird Rate: £275 + VAT per delegate for bookings paid for by the early bird (EB) rate. (Bookings made by the EB closing date, but not paid by this date, will be charged at the higher rate).  
Early bird (EB) closing date is 5 January 2022.

**Printed documentation will be sent to you by post and is 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.  /  /

*N.B. Please do not email a PDF of this form with your credit card details.*

**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.**

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22/02  
22/04

## BOOK NOW and return your completed form to:

**Post:** Bookings, The At Work Partnership Ltd, Office 3A, Highstone House, 165 High Street, Barnet, EN5 5SU

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

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