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

Tuesday 26 January 2027
One-day virtual workshop

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.

THE @Work PARTNERSHIP

Quality conferences at value for money prices

Course tutors:

Sandra Winters, independent specialist (OH) practitioner

Prof Diana Kloss, barrister

Dr Nerys Williams, independent OH physician

Recent delegates at this workshop said:

"I absolutely loved this day. So interesting, great speakers... so valuable"
Lynda Lewis, occupational health clinical contracts manager, Portsmouth Hospital University NHS Trust

"Well organised, good value, brilliant speakers, good discussion"
Dr Nila Gulko, independent OHP, VITA NG Ltd

"Excellent deep dive into the format, details, legalities and ethics"
Stephen Russell, OH nurse, International SOS

SPECIAL OFFERS

Book & pay by 01.12.26 for early bird offers! Further discounts available for self-funded delegates and NHS Health at Work members!

Programme

8.55 Registration

9.00 Welcome and introduction

9.10 Setting and meeting management and employee expectations for OH reports

Sandra Winters,
independent specialist (OH) practitioner

- What makes a good report?
- What information should it contain or not contain?
- 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 Coffee

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

Prof Diana Kloss, **barrister**

- Importance of record keeping
- Complying with data protection principles
- 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

12.15 Lunch

1.10 The OH consultation and records

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

2.10 Effective OH reports

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

3.25 Effective OH reports practical work

Sandra Winters **and** ***Dr Nerys Williams***

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

Dr Nerys Williams,
independent OH physician

- Auditing your OH reports
- Importance of getting OH reports right

4.30 Final questions

4.35 End of day

Further details about the course are on our website: **www.atworkpartnership.co.uk**

The course is not intended to cover reports carried out for statutory health surveillance. Please note this is a UK based course so this will be reflected in the content covered.

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:

- OH professionals • Other professionally registered practitioners working in OH

The course attracts OH and allied professionals with differing levels of OH experience. For the more experienced OH professional, it is very useful as a refresher course

How will attending this training benefit you?

- Learn how to write 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
- 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 GMC, FOM and the ICO. 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:

ABOUT OUR EXPERT TUTORS

Sandra Winters is an independent specialist (OH) practitioner, and was previously head of health and wellbeing for NHS England. She is a nurse consultant in OH, and specialises in the strategic development of workplace health and wellbeing.

Dr Nerys Williams is a consultant occupational physician and accredited specialist in occupational medicine with experience across public and private sectors and healthcare governance. She currently has a range of professional roles at the General Medical Council and in the Civil Service.

Prof Diana Kloss is a barrister, former employment judge and honorary senior lecturer in OH Law at the University of Manchester. She is an honorary fellow of the Faculty of Occupational Medicine, an ACAS arbitrator, and in 2009, was awarded an MBE.

Booking information

OH Report Writing – 26 January 2027 – Virtual event

SPECIAL OFFER: Save up to £75 with our early bird rates! Available for bookings paid **before** Tuesday 1 December 2026!

First delegate

Early bird rate:
£290 + VAT (£348) per delegate – save £75!

Main rate (for payment **after** early bird closing date):
£365 + VAT (£438) per delegate

Second delegate – save £50

Early bird rate:
£240 + VAT (£288) per delegate

Main rate (for payment **after** early bird closing date):
£315 + VAT (£378) per delegate

NHS Health at Work network members can save an additional 5% on these prices – see online for details

Self-funded delegates* £220 + VAT (£264) if paid **before** early bird closing date OR £295 + VAT (£354) if paid **after** early bird closing date.*(*rate applies to sole traders or when your employer does NOT fund your fee)*

ADMINISTRATION

Format: The event will be held virtually on Zoom.

Bookings: Places can be booked online or by telephone. In cases, where your paperwork may take time to reach us, please contact us to reserve a no-obligation provisional place. Please contact us if you do not receive written confirmation of your booking within two weeks of making the reservation. To process your order, we keep your details securely on our database and we NEVER pass on your details to 3rd parties. At the time of booking, you will be given options to choose your preferred methods of communication with The At Work Partnership.

Conference administration details: Full instructions will be sent with your administration details. 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 email 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. If the cancellation is received within 14 days of the workshop, no refund will be made, but we will accept an alternative delegate. Refunds are not available to delegates who fail to attend after confirming a booking.

Printed documentation: This will be posted to arrive with paid delegates 3 working days before the event. Please provide a preferred delivery address at the time of booking for receipt of your documents.

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

HOW TO BOOK

To secure your place use one of the 3 methods below

1. Book online: **www.atworkpartnership.co.uk**
2. T: 0208 344 2328
3. E: conferences@atworkpartnership.co.uk

BOOK ONLINE NOW

www.atworkpartnership.co.uk

ABOUT THE AT WORK PARTNERSHIP

Dedicated to bringing high quality, good value conferences and courses to OH and allied health professionals, **The At Work Partnership** researches the subjects that really matter to professionals in your field, and sources speakers who are true subject experts.

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.

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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