



**BEST PRACTICE RECORDS AND MANAGEMENT REFERRAL REPORTS FOR OHP
VIA LIVE INTERACTIVE ONLINE LINK
Friday 1 December 2023 09.00 - 16.30**

Who is this training designed for?

This training is for Occupational Health Practitioners (“OHP”) to equip them with a toolkit of essential legal knowledge, practical skills and the confidence to keep **Best Practice Records** and **Management Referral Reports**. The training is fun, innovative, and interactive with practical case studies on records and reports, discussions and role play.

Who delivers the training?

The training will be delivered by Legal Experience Training. The tutor will be a solicitor or barrister who is also experienced in delivering skills based interactive training.

Objectives and learning outcomes

Best Practice Records are essential for safe and effective practice and protecting individuals and organisations in the event of complaints, disciplinary matters, employment claims and civil litigation. Occupational health clinical records must meet legal and professional practice recommendations. Best practice records of the history, examinations, diagnosis, assessment, consent, arrangements, and follow up are essential. This audit trail is vital to support recommendations made and to evidence the proper handling of confidentiality, data processing, consent and disclosure issues. Delegates will use competency criteria to assess clinical records to assist their own practice and to provide a vital audit tool.

Management Referral Reports must address specific questions and require findings of fact, recommendations or opinions. The reports provide the basis for decisions by the employer on future action and adjustments in employment. It is vital that reports are clear, justifiable and actionable. Occupational health reports may be challenged in legal or litigation processes, so reports must clearly demonstrate the factual basis and reason for the action, advice or recommendations. OHP learn to structure a report to deal effectively with the issues and provide the evidence for their opinion. OHP will consider different types of evidence to include in the report; records, tests, examinations, assessments, the workplace environment, the requirements of the role, research and the opinion of others relied on (Consultants or GPs).

Learning outcomes

- Identifying the pitfalls in record keeping
- Understanding the different types of information or evidence in record keeping
- Understanding the legal obligations and duties in record creation, maintenance and disclosure
- Analysing the key stages in writing a report; issues, facts, assumptions and opinions
- How to provide a factual basis to justify advice, recommendations or opinions in the report
- Dealing with strengths and weaknesses in the facts
- Writing in a clear, concise and accessible manner
- Analysing the structure, content and style of a report
- Practical exercises critiquing records and reports using objective competency criteria for best practice
- Experiencing cross-examination on records and reports to demonstrate how they are challenged