

Report-writing: a guide to style

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Training in AFOEM has long required encounters for case-based discussion (CbD) and direct observation of field skills (DOFS). From now, as part of training requirements, trainees must submit a written report of these encounters. This guide suggests a style of writing for these reports. We follow on with a template for a DOFS report on a workplace incident.

The style guide makes 30 points. On page one are positive assertions on layout and writing style. Page two is divided into two columns: on the left is what we suggest you usually do; on the right is what we suggest you usually don't do.

Above all, be clear. Make your writing plain, straightforward, orderly and sincere.

Layout

1. Organise your report into a logical sequence of sections with headings.
2. Introduce your report with a concise summary of your main conclusions, findings or recommendations.
3. Number your pages.

Style

4. Gather within each paragraph the sentences you need to make a particular point, and to justify and explore that point.
5. Write *your findings* in the past tense, e.g. 'I observed the inlet of the local exhaust ventilation system was close to the source of dust and that the size and shape of the hood was designed well to capture this dust.'
6. Write your actions as though you did them, e.g. 'I made this visit to assess proposed duties for Mr JF, a carpenter.'
7. Use common abbreviations correctly. Thus, 'e.g.' means 'for example', 'i.e.' means 'that is', 'viz.' means 'namely'.
8. When you put a comma in a sentence, say the sentence in your mind. A comma gives a brief pause in the flow of words usually to bring *emphasis* – a change of tone of voice if you were speaking it. Here are three illustrations.
 - o Commas between words on a list emphasises the separateness of these words.
 - o When a word such as 'However,' or 'Occasionally,' starts a sentence, the comma gives emphasis to this word and signals that words that follow will contrast with or qualify the thought in the previous sentence.
 - o The use of commas can, by what they emphasise, change the meaning of a sentence:

Sentence	Meaning
The safety shield, which she tried to use, was broken.	The focus of this sentence is that the safety shield was broken. The additional information was that she had tried to use it. This could be expressed as 'The safety shield was broken. However, she tried to use it.'
The safety shield that she tried to use was broken.	Here, it was not just any safety shield that was broken. It was <i>the</i> particular one that she had tried to use.

9. Write dates like this: 15 November 2018. Having the month spelt in words reduces the clutter of numerals and makes the time sequence of occurrences easier to follow.
10. Write numbers *one to nine* as words, e.g. six; write others in numerals, e.g. 25. Exceptions are when the number is expressed as a measurement or a percentage, e.g. 5 kg, 8%.
11. In this sentence: 'If a worker inhales ammonia gas, she or he will cough.', the single use of 'she or he' is easy to follow. However, if you need to continue on with more 'she or he' or with 'hers or his' and 'herself or himself', the clutter of pronouns will get in the way of your message. Then, we suggest using the plural forms – they, theirs, themselves – because these are gender-free. This is expediency; it trades correctness in grammar for a simpler, clearer message.
12. Write *possessive pronouns*, e.g. ours, its, his, hers, theirs, yours, without apostrophes. Possessive nouns *do* have apostrophes, e.g. The insurer's report. The word *it's* is not a possessive pronoun; it is an abbreviation for "it is".
13. Use *an* to introduce a *noun* starting with a, e, i, o, or a silent h, e.g. hour. Use *an* when a word starting with *u* sounds like "uh", e.g. an umbrella. Otherwise use *a*, as in "a union".
14. Use a colon, :, to *introduce* a short quotation or a list. If the list contains single words, separate these by commas. If each of the listed items has several words and even a verb, separate these by semi-colons (;).
15. Explain an acronym the first time that you use it, or any shorthand expression whose *meaning or significance* is likely to be little-known beyond your own discipline. For example, the expression, 'Her condition was *treated conservatively*', conveys meaning to a person that knows how this condition can be treated. It has less meaning for others; for them it's more helpful to say what the treatment was.
16. When you give an opinion, be firm. Focus on what needs to change or be retained rather than the administrative processes needed to achieve this.
17. PROOF READ by scanning the *shape* of your words on your screen, checking whether you've repeated yourself, and picking out expressions that sound unnatural to your ears.

Some Dos and Don'ts – *usually*

Here, on the left side of the page, we suggest things that are *usually* good to do contrasted with things preferably avoided on the right. These ideas are offered as guidance to clear expression, not fixed rules. Sometimes one writes what one usually wouldn't because this change to style fits the message better.

Usually do	Usually avoid
18. For a report, have one idea per sentence.	For reports, avoid sentences of more than 30 words.
19. Prefer definite, specific, concrete language. <i>Say</i> 'Amid this noise, few workers wore ear protection' <i>rather than</i> 'There appeared to be inadequate compliance with the hearing conservation program'. <i>Say</i> 'Show workers how to don a respirator' <i>rather than</i> 'Worker education is required in regard to protection from airborne hazards'.	Avoid general, abstract words except where you want to speak of a collection or of a broad principle or idea.
20. Prefer the <i>active voice</i> , where you declare that a person or company did or required something. <i>Say</i> 'The worker wore a respirator' <i>rather than</i> 'A respirator was worn by the worker'. <i>Say</i> 'The manager required attendance' <i>rather than</i> 'Attendance was required by the manager'. <i>Say</i> 'I assessed the risk of doing each task' <i>rather than</i> 'A risk assessment was performed on each task'.	
21. Omit needless words. If you can use one word instead of three or four, then do. <i>Say</i> 'she ...' <i>rather than</i> 'she is a person who ...' <i>Say</i> 'depends' <i>rather than</i> 'is dependent upon' <i>Say</i> 'since' or 'because' <i>rather than</i> 'owing to the fact that' <i>Say</i> 'his failure' <i>rather than</i> 'the fact that he had not succeeded'	
22. To refer to an attribute or virtue in a patient, simply say whether it was there or not. <i>Say</i> 'Mr JF stated that he was not vaccinated' <i>rather than</i> 'Mr JF denied he was vaccinated'. Use of 'denied' here makes it sound like you were <i>accusing</i> him of being vaccinated.	Avoid using the word <i>deny</i> when describing how a patient talks about a personal attribute or virtue.
23. If you refer to a worker's test result or finding on physical examination, explain its significance for prognosis or function.	Avoid merely quoting an x-ray report that says "nil bony trauma noted" or a physical examination finding, "positive empty can test right shoulder" to a <i>non-medical</i> reader without making its meaning and significance clear.
24. Admit doubt <i>only</i> when you have too few facts or when the present or likely future situation is truly unclear.	Avoid <i>needlessly</i> admitting doubt. It weakens your authority. Save expressions such as <i>could be</i> , <i>may be</i> or <i>might be</i> for situations involving real uncertainty
25. Make your statements in a <i>positive</i> form, e.g. 'He usually came late'.	Don't weaken the power of your assertions by negative expression, e.g. 'He was not very often on time'.
26. State only what you perceive as the extent of risk in any situation – no more, no less.	Do not overstate the severity of a situation. Doing this will cause the reader of your report to doubt your judgment.
27. Treat the word <i>safe</i> as <u>absolute</u> (either it is safe or it isn't), but take care to define the limits of the situation to which you are applying <i>safe</i> . Much the same advice applies to the word 'fit'.	Do not say <i>partially safe</i> or, even worse, "safe". Using <i>partially</i> makes the message vague; writing "safe" (in inverted commas) indicates that you don't really mean it. If you think it's either safe or unsafe then say so. If you're not sure, avoid <i>safe</i> altogether and describe the situation in some other way.
28. Use plain words such as 'man' or 'woman'.	Avoid being coy or showy, e.g. saying 'gentleman' or 'lady'.
29. In using gender-neutral or inclusive language, still be clear. Form your sentences to say what you mean, e.g. <i>who</i> did <i>what</i> to <i>whom</i> <i>when</i> .	Don't confuse your reader with awkward pronouns nor blunt your message by postured tact.
30. There are a dozen ways to make nouns plural but, for many, you simply add an s, e.g. workers.	Don't add an apostrophe before the s when you make a noun plural. Write <i>a group of workers</i> not <i>a group of worker's</i> .

Two guides to style in writing

Strunk W Jr, White EB. The elements of style. New York: Longman [various editions].
Tredennick M. The little red writing book. Sydney: Newsouth, 2006.

EXAMPLE OF LAYOUT FOR A REPORT ON A WORKPLACE

This demonstrates a way to lay out a report about a workplace visit made to assess and advise on a health and safety issue in part of a work premises.

Summary: Make a one-paragraph summary of up to 100 words that shows the main points and direction of your report.

Reason for the visit: Explain this. Typically, for a doctor, a visit will follow an incident where a worker whom you've seen as a patient has been injured or suffered illness. Although the visit has been prompted by this, *the focus of recommendations will be wider health and safety in that section of the workplace.*

If indeed the visit has been prompted by a worker's injury, a basis for your recommendations will be to *prevent* re-injury of this worker or similar injuries to other workers. Accordingly, you may consider that your recommendations will carry more weight if they include medical details. Be careful with this. If you want to reveal details about a worker's pathology more than is already available on his or her workers' compensation form, you must obtain the worker's specific consent for the details that you seek to reveal and for whom it will be revealed to. In this, the most sensitive issues of all are behavioural and mental health conditions.

Indicate who invited you and who the other *stakeholders* are – workers, the employer, the insurer? What do these people expect of you?

Reports and other materials supplied in advance of your visit: Examples would include details of the incident, a plan or photos of that area of the workplace, details of other incidents there, drug and alcohol policy, reports on hygiene or ergonomics. If these were not provided, did you actively seek them to aid your preparation.

Who accompanied you on your visit

- State who accompanied you as you walked around, their role or stake in doing this.

Description of the work situation or process:

- Where did it occur?
- What activities normally occur there?

Description of the incident:

- Describe the incident – what happened, who was affected, severity of consequences.
- What sequence of events led to the incident?
- What factors contributed to its occurrence? For example, include reference to maintenance, time of day, ambient conditions, fatigue, time pressures, low staffing levels.
- What happened afterwards, e.g. shut-down, repair, involvement of government inspectors, union, police, compensation claim, review of training?

The affected worker(s):

- Nature of injury or illness (if relevant).
- Extent of his or her functional recovery if return to work seems imminent.

Relevant laws and standards

- What laws and standards affect this situation, e.g. OHS, transport and storage of dangerous goods, industry codes or Australian/New Zealand Standards.
- Records of compliance.

Remedial action already taken

- What changes relevant to health and safety were made following the incident?
- Evidence or impression that the changes are sufficient.

What more is needed?

- Does the situation now appear to meet with the requirements of laws, codes, standards?
- If not, what further change (if any) appears necessary?
- What incentives may be harnessed to bring change, e.g. law, costs, company's reputation?

Recommendations

Remind yourself of the central purpose of your visit and what your recommendations are for. Recommendations that are made for the ongoing health and safety of *many* workers will commonly differ in extent from recommendations made to facilitate a single injured worker's return to work so as to reduce the risk of re-injury. As you write your recommendations, you will, of course, bear in mind the hierarchy of control. However, you do *not* need to show off that you've heard of it. Instead, target the situation and make recommendations that are *specific*, clear and *just enough* to get necessary change happening. After reading your report, the relevant manager should know where to start and why. The reader of your report will ignore vague, general recommendations.

Before you recommend preventive action, make yourself aware of which changes are likely to be costly and which are relatively cheap. For example, changes to vehicles or substantial changes to ventilation systems are expensive. Your recommendation for such change cannot be simply a 'throwaway line' in your report – something 'nice to have'. Persuading an employer to make this change will require strong justification with reference to law and the serious risks of inaction.

- Who will you seek to influence?
- Thoughtfully judge the extent of persuasion that is likely to be required.
- Make recommendations that are specific, clear and achievable with reasonable effort.
- Should your recommendations for further change include some interim stage, some 'stepping stones', some 'scaffolding' before what is needed can be achieved?

Additional matters

- As you walk through a workplace, you are likely to notice ill-controlled hazards that are *not* part of the reason for your visit. Note these in your report; it is ethical to do so. However, state that your recommendations in *this* report do not extend to these.
- Answer any questions that are asked by the person that sought your visit. Repeat the wording of each question in your report and respond to it succinctly. Based on what you've already written in your report, the reader should get no surprises by your responses to these questions.