



MOORE THAN ARTHRITIS | FREE RESOURCE

Preparing for an Occupational Health Conversation

Explain function, priorities and the questions that matter.



WORKPLACE INCLUSION Practical, respectful and evidence-informed guidance for sustainable work.

Supporting People | Raising Awareness | Building Community | Living Beyond the Diagnosis

Stronger together. Beyond limits.

General workplace information - not individual medical or legal advice | Version 1.0 | August 2026



Preparing for an Occupational Health Conversation

Explain function, priorities and the questions that matter.

KEY MESSAGE Occupational health advises on health and work; the employer remains responsible for workplace decisions and legal duties.

Purpose Understand why the referral or assessment is being requested.	Consent Know what information may be shared and with whom.	Role demands Describe actual tasks, hours, travel and environment.
Functional effects Explain what is difficult rather than only naming a diagnosis.	Priorities Identify what would help you stay in or return to work.	Report process Ask when you can see the report and how it will be used.

Scope This resource offers general workplace information. It cannot determine whether a person is legally disabled or what is reasonable in a specific case.



What can make workplace inclusion harder

Look beyond diagnosis labels to the interaction between the person, the role, the environment and workplace systems.

Unclear questions A vague referral may produce vague recommendations.	Missing job detail The adviser needs an accurate role picture.	Fear People may believe the adviser decides dismissal.
Over-disclosure Only relevant information should be shared.	No implementation Recommendations do not automatically become action.	No follow-up Workplace decisions still need discussion and review.

AVOID ASSUMPTIONS Individual experience, role demands and effective support vary.



Actions that may reduce disadvantage

Use a person-centred discussion and competent advice where needed. Adjustments should be effective, proportionate and reviewable.

Read the referral Correct inaccurate or incomplete role information.	Prepare examples Use tasks, frequency and recovery impact.	List current support Explain what works and what does not.
Ask about consent Clarify report access and sharing.	Identify questions Focus on capability, adjustments and review.	Keep a copy Retain agreed reports and workplace outcomes.

Confidentiality Agree what information may be shared, with whom and for what practical purpose. Health information requires particular protection.



From first conversation to review

A consistent process improves trust, accountability and the chance that support works in practice.

1. Clarify the assessment purpose
2. Prepare job demands and functional examples
3. Attend and ask questions
4. Review the proposed report where applicable
5. Discuss recommendations with the employer
6. Record decisions and review

Questions for the conversation

- What work outcome matters most?
- Which task, practice or environment creates the barrier?
- What has helped or made things harder before?
- Which options should be tried or assessed?
- Who will act, by when, and when will we review?

Keep it practical Record the decision, reason, action owner, target date, confidentiality agreement and review point.



Use this page to prepare or record action

Complete only the fields that are relevant. Keep personal health information secure and share it only through appropriate routes.

1. The referral question is:

2. My role involves:

3. The main functional effect is:

4. Current support includes:

5. An option to explore is:

6. My consent and sharing preference is:

Action record Decision: _____ Owner: _____ Target date:

Review date: _____ Measure of success:



Use the right route for the issue

Workplace inclusion can involve equality law, employment rights, health and safety, data protection, HR policy and medical care. One conversation may not resolve every part.

Important Health information is confidential and specially protected. Raise concerns if information is collected, stored or shared more widely than necessary.

Appropriate next steps may include

- Review the adjustment or work plan with the employee and manager
- Use HR, occupational health, health and safety or Access to Work where appropriate
- Seek medical advice for new, severe or worsening health symptoms
- Use a union, Acas, Citizens Advice or independent legal advice for employment concerns
- Call 999 for a life-threatening emergency or use NHS 111 for urgent medical help that is not an emergency

Jurisdiction Equality Act 2010 information in this resource applies to England, Scotland and Wales. Northern Ireland has separate disability-discrimination legislation and support routes.



Trusted workplace information

Use current primary guidance and obtain professional advice for the facts of an individual case.

- [1] **Acas - Occupational health assessments.** Consent, confidentiality and assessment. [Open source](#)
- [2] **ICO - Workers health information.** Protecting special-category health data. [Open source](#)
- [3] **Acas - Supporting disabled people at work.** Inclusive conversations, language and confidentiality. [Open source](#)
- [4] **Acas - Reasonable adjustments.** Making, discussing, recording and reviewing adjustments. [Open source](#)
- [5] **NICE NG197 - Shared decision making.** Person-centred decisions and clear information. [Open source](#)

Evidence checked: 21 August 2026. Review sooner if UK employment, equality, health or data-protection guidance changes.

Related Moore Than Arthritis workplace resources

- Talking to Your Employer About Arthritis
- Reasonable Adjustments in Practice
- Managing Pain, Fatigue and Flare-Ups at Work
- Line Manager Support Toolkit
- Workplace Accessibility Self-Assessment Toolkit

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Disclaimer This resource provides general educational information and is not medical, occupational-health, employment or legal advice. Moore Than Arthritis does not determine disability status, employment rights or the reasonableness of an adjustment. Obtain advice from an appropriately qualified professional about individual circumstances.

Stronger together. Beyond limits.