



How to manage onboarding new starters and understand health concerns that might affect them at work

HR Case Study

P3 People Management





Client Overview

Sector: Aggregate Industry

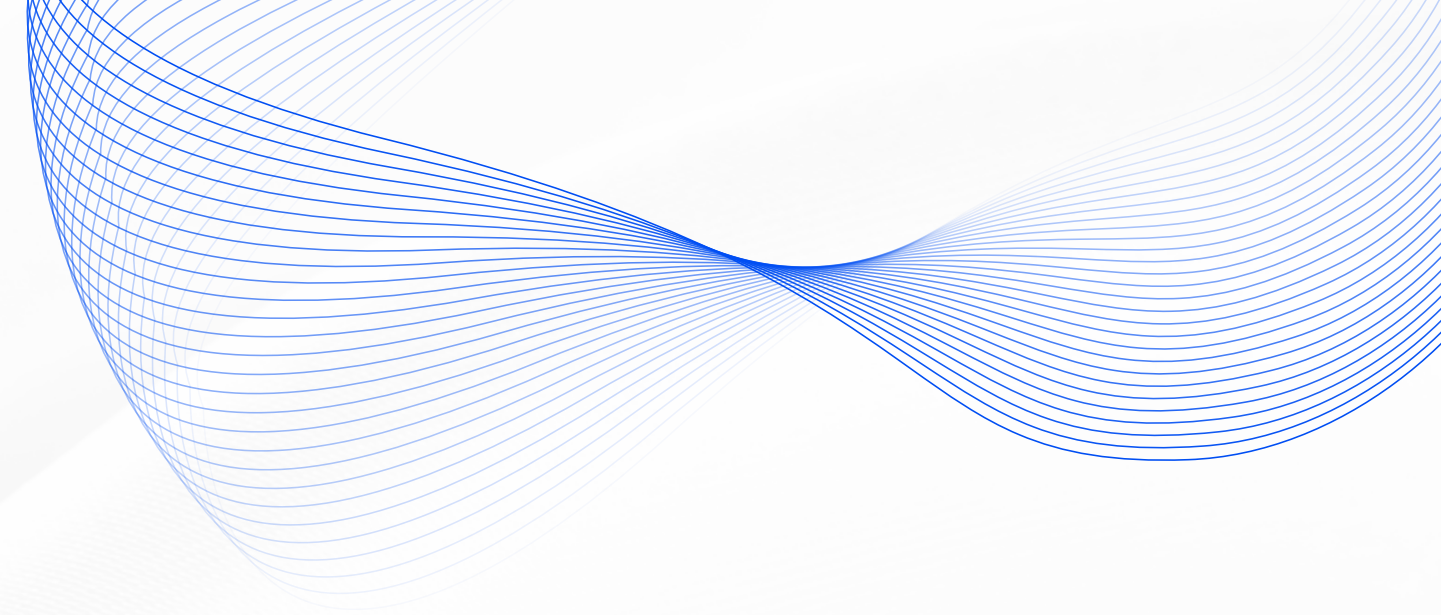
Size: Multiple sites 200+ employees

HR Setup: 1 in house Global HR Manager (relatively new to the business)

Key Employment Context: New Starter Questionnaire



The Challenge



The business faced challenges with onboarding, as managers had limited visibility of new employees' health concerns. This often led to a reactive approach, with issues only being addressed once problems arose. Without a consistent process, important health information was sometimes missed, delaying reasonable adjustments and impacting wellbeing and productivity.


Previously, the business used detailed medical questionnaires. However, neither managers nor HR are qualified medical professionals, meaning they could not safely interpret the information disclosed. This created a risk of mismanaging health-related details, leading to inappropriate decisions, delays in support, and potential legal issues.

Introducing the New Starter Questionnaire (NSQ) created a clear, structured way to collect only relevant information early on. It allows potential risks to be identified quickly, supporting compliance with the Equality Act 2010 and the Health and Safety at Work Act. Managers can then plan adjustments proactively, improving employee wellbeing, while the process provides a clear audit trail to protect the business during inspections or disputes.




Our Approach

Initial Assessment:

-  We began by gathering key information to understand the client's current onboarding process. This included reviewing existing onboarding documents, employment contracts, and any previous correspondence relating to employee health and wellbeing. This helped us identify gaps and risks in their current approach removing the use of their old medical questionnaires from their documents.

Support Provided:

-  We provided clear, practical steps for implementing the NSQ. This included advice on introducing the process sensitively, ensuring compliance with the Equality Act 2010 and the Health and Safety at Work Act. We also outlined how managers should review responses and when to escalate concerns, such as to occupational health.



Our Approach

Support Provided:

- As part of our hands on support, we reviewed and updated relevant policies, liaised with the third-party provider on what information we would need from the managers to send the NSQ referral to the new employee, and coached managers on handling sensitive health disclosures. We also guided the client on how to manage any reasonable

Communication & Engagement:

- We helped the client prepare clear and compliant communications to explain the purpose of the NSQ to new employees. This encouraged open and honest disclosure, reassured staff that their information would be handled confidentially, and reinforced the company's commitment to employee wellbeing while protecting the business.



Outcome & Impact



Introduced a compliant process for gathering health information at the start of employment



Reduced delays in implementing adjustments, improving employee wellbeing and productivity



Created a structured, proactive onboarding process, reducing the risk of disputes or claims



Increased manager confidence in handling sensitive disclosures and planning reasonable adjustments



Decreased health and safety risks by identifying potential issues early



Strengthened trust and communication between new employees and management





Lessons & Next Steps

What the client learnt about their own people management approach:

- 1** The client recognised the importance of proactive people management, particularly around health and wellbeing during onboarding.
- 2** They identified a need for manager training on handling sensitive health information and making reasonable adjustments.
- 3** The process led to updates in onboarding policies and a more consistent, structured approach to new starter health checks.
- 4** We continue to work with the client on ongoing HR projects, including manager development and process improvements.



What Could Have Happened Without Support?

If the client had continued using their old medical questionnaires, several issues could have arisen

By moving to a simple NSQ process, the business now gathers only essential, relevant information, keeping it compliant, consistent, and focused on employee safety and wellbeing through the professional channels.



Legal non-compliance: Medical questionnaires can breach the Equality Act 2010 if used incorrectly, as employers are restricted from asking about health before a job offer is made.



Data protection risks: Collecting detailed medical information without proper processes could have led to GDPR breaches, exposing the business to complaints or fines.



Poor handling of health information: Neither HR nor managers are medical professionals, so interpreting medical data could have resulted in incorrect decisions or failure to make reasonable adjustments.



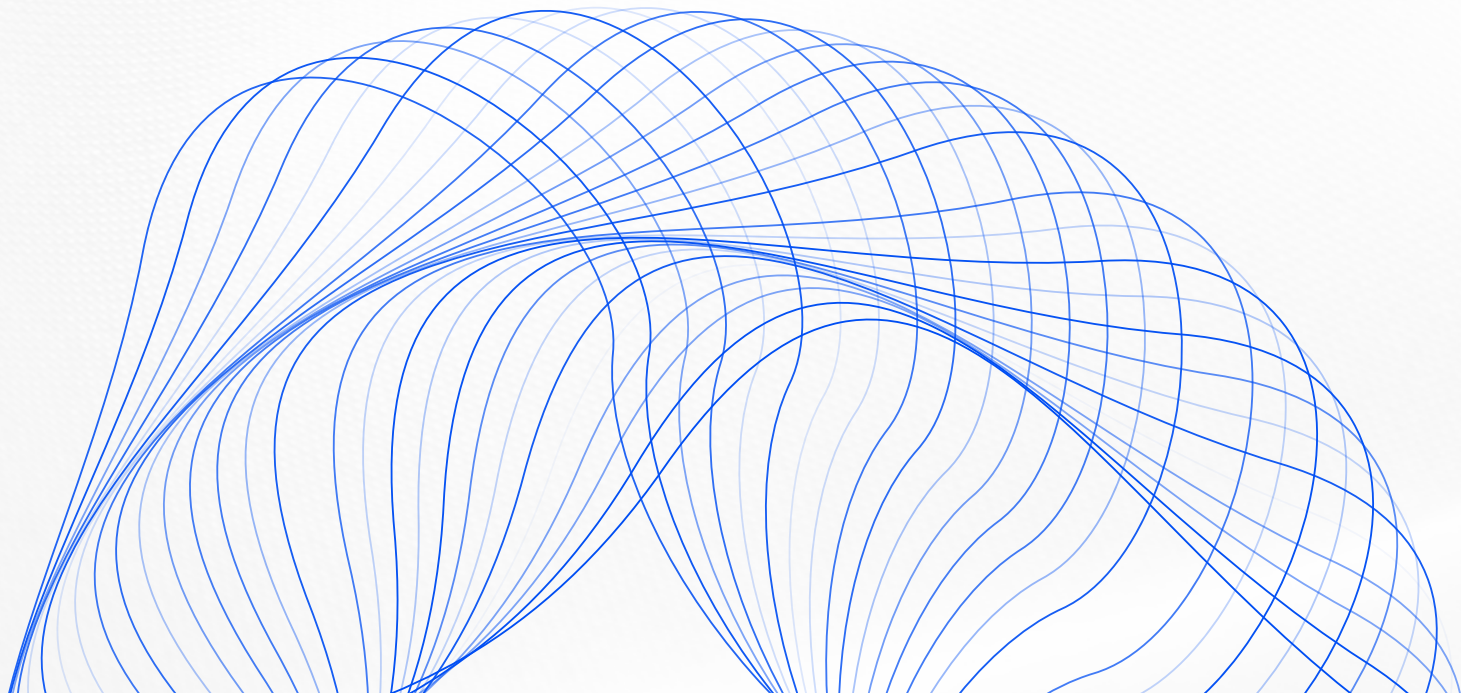
Employee distrust: Asking for unnecessary or intrusive medical details might have discouraged disclosure, damaging trust and engagement.



Coached the manager on how to have the conversation



Increased risk of disputes or claims: Mishandling health information could have led to grievances, tribunal claims, or reputational damage.





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