

A photograph of two office professionals, a woman and a man, sitting at a desk with a laptop. The woman is pointing at the screen while the man looks on. The image is framed by large, colorful abstract shapes in shades of blue, orange, and yellow.

Management Referrals

The EAP is available to help managers and supervisors ensure they're helping their employees and ensuring great performance, quality of work, and engagement. Employees facing major work-life concerns affect engagement, productivity, and safety. At some point, most supervisors need to help employees whose personal problems affect their work performance. The EAP can help supervisors make referrals when they have employees who may need to resolve personal issues. Unlimited management referrals are available in the EAP.

Referrals to the EAP are either voluntary or involuntary.

- Voluntary includes self-referral or supervisor referral (offer of available services).
- Mandated (involuntary) referrals are for behavioral or performance problems that limit the ability of the individual to perform their duties or compromises safety. Mandated referrals may be used to assess and address significant behavioral issues, or to evaluate Fitness-for-Duty (FFD) when a question of safety arises. FFDs are usually for violations of the drug-free workplace or workplace violence policy.

EAP management referrals may be used as an option in a performance improvement plan, but are not in themselves a form of discipline. When using the EAP to assist in personal or behavioral issues affecting the workplace, the employee may be offered or directed to be evaluated by the EAP. This action could be an alternative to implementing further disciplinary action at the time.

Making a referral is straightforward when supervisors work closely with our care team. A supervisor simply calls the EAP and asks for help with a management referral. They are then connected with a care manager, who helps the supervisor determine a plan of action. If appropriate, they also start the formal management referral process.

Steps in a Formal Management Referral

1. HR Referral Form and Authorization for Release of Confidential Information are completed.
2. Care Manager selects provider to help the member and schedules their first appointment.
3. HR speaks with member to let them know they must call and begin services. Member is informed of date/time of first care session.
4. Care Manager monitors progress and confirms attendance of the mandatory sessions.
5. Care Manager updates HR on completion of sessions, and if any additional counseling or care are recommended.
6. If additional counseling is recommended, Care Manager helps coordinate through appropriate benefits available (possibilities include: behavioral health insurance, medical insurance, out-of-pocket).
7. Care Manager monitors the status of additional care until care is completed.

To speak with the EAP regarding a mandatory referral, please call 1-800-395-1616 and press 4.