

The EAP formal manager referral process

This is a valuable tool for managers when they wish to implement a process involving their referral of an employee for independent support and assistance from an EAP Professional. In the majority of cases these types of referrals are linked to a performance or behavioural issue that has been raised with the individual and subsequently is being managed by the Employer.

Manager Referrals also provide the opportunity for the referring manager to request feedback from EAP Services in order to assist them to manage the circumstances under which they have referred an employee. Feedback could be as little as confirmation of attendance. To ensure that any requested feedback is easily supplied to the referring manager, we require the employee to also sign this form (where indicated), giving their authority for EAP Services to disclose the stated feedback to the referring manager.

Our Manager Referral Form can be downloaded from our website, by clicking on the this link [Manager Referral Form](#) (and scrolling down to it). We always encourage that the manager and the employee fill this form out together, so that the employee is aware of and understands the feedback being requested of EAP prior to signing the form. It is also common for the referring manager to attach further background and information with their referral form, outlining the impact on the performance or workplace as a result of the issues raised with the employee (and reason driving the manager intervention).

Typically, the type of feedback most regularly requested from EAP is:

- Record of Attendance (at the very least we would recommend that you always tick this checkbox)
- Level of engagement that the employee demonstrated during the EAP sessions
- Confirmation that during the course of the EAP sessions, the employee was able to identify the issues driving their poor performance/behaviour. NB: If the issues are work-related, then it may be of use for the referring manager to know what these work-related issues are, as this may suggest further action/involvement by the manager
- What progress did the individual feel that they had made by the end of the EAP programme
- Confirmation that practical advice/strategies have been given to the employee to (improve their state the performance or behavioural issue)
- What progress did the professional working with the employee observe in them at the end of the EAP
- In what timeframe might EAP expect the referring manager to see an improvement in this employee's (behaviour/performance)
- Is there any further support or assistance that EAP can recommend to the referring manager that could be of benefit to offer this employee under these specific circumstances

The above are suggestions for feedback only, as each referral is addressing specific circumstances for a specific individual. All feedback required must be stated where indicated on or attached to the Manager Referral form.

The referring manager then emails the completed form to manager.referral@eapservices.co.nz

EAP Services then makes contact with the employee to schedule their first EAP session and the referring manager is emailed confirmation that we have received the referral and the date/time on which we have scheduled the employee's first EAP session. EAP then continues to progress the programme with the individual until the EAP professional deems it is complete.

We encourage the referring Manager to also check-in regularly with the employee during the course of their EAP programme, ie ask them how they are finding it, what progress they think they are making, etc. At the completion of the EAP (ie when the employee is well on their way to achieving their counselling goals), the referring manager will receive the report from EAP Services containing the requested feedback.

