

# Making Effective Referrals to the Employee Assistance Program

Florida Association of School Personnel  
Administrators' Conference

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# Introduction

**Our goals will be to:**

- Introduce qualities of an effective Employee Assistance Program
- Discuss how to use the program as a management tool, proactively and on a routine basis
- Describe how to use EAP for consultation and support
- Describe performance indicators
- Discuss barriers- supervisor and employee



# What has your experience been using EAP as a management tool?

- **Positives & Challenges**



# What is an Employee Assistance Program?

A worksite-based program designed to assist:

1. Work organizations in addressing productivity issues
2. Employee clients in identifying and resolving personal concerns, including, but not limited to health, marital, family, financial, alcohol, drug, legal, emotional, stress, or other personal issues that may affect job performance



# Why have an EAP?

- Philosophy and basic components
- Outcome statistics and return on investment
- Your need as a supervisor



# EAP Services

- Consultation with supervisors
  - On-site presence for crisis and conflict situations
- Assessment and short-term problem resolution
- Referral to community resources
- Follow up monitoring of performance based referrals



# EAP Services

- CISM and Trauma Response
- Awareness Materials
- Employee & Supervisor Orientation
- 24/7 Crisis intervention
- Drug-free Workplace Training & Specialty Services



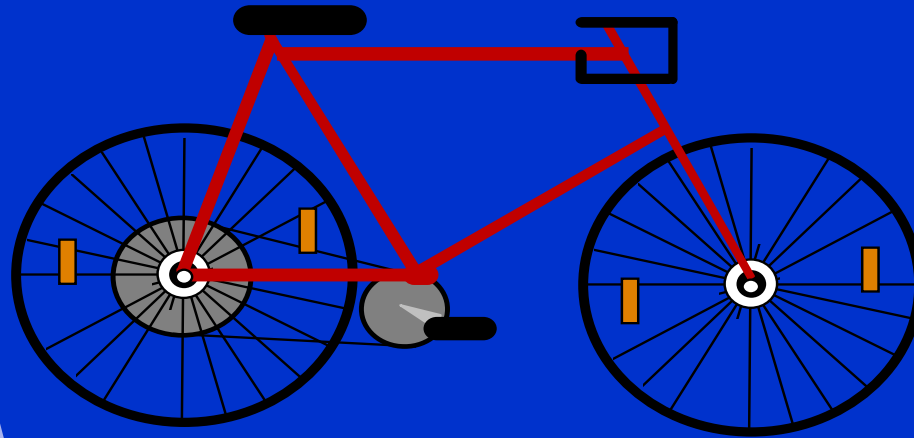
# Qualities of an Effective EAP Provider

- Work-site based
- Strong local presence
- Expertise in delivery of EAP services as evidenced by membership with EAPA Inc. & business references
- Responsive, responsive, responsive
- Certified *Employee Assistance Professionals*
- Delivery of EAP core technology





# 1-800-CALL EAP



**Better than nothing**

**Cheaper**

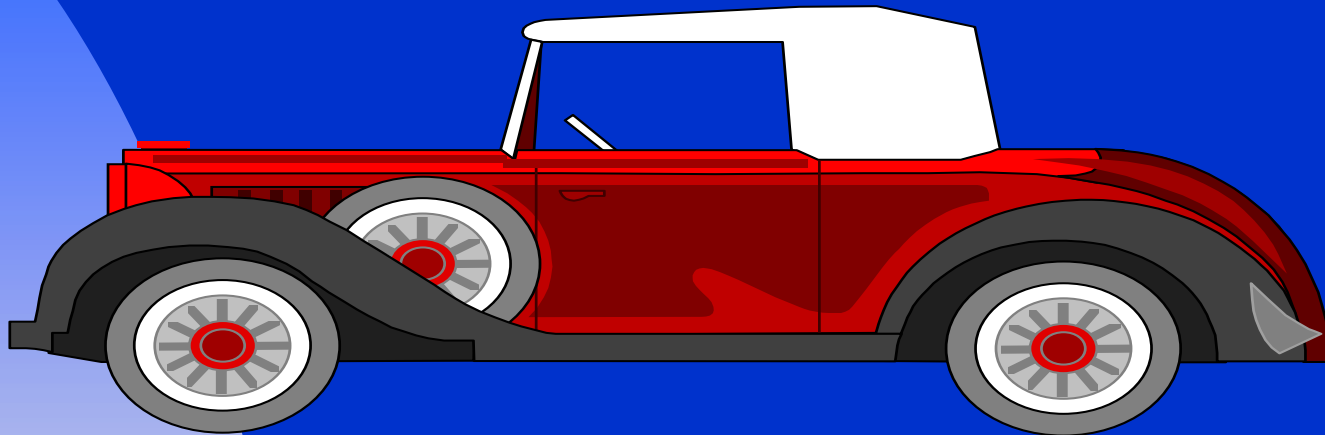
**Impersonal**

**Not familiar with organization**



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# “BRANCH OFFICE” EAP



**Better than 1-800 Service**  
**Main office is out of town**  
**Are local providers EAP professionals?**  
**Are Administrators locally available?**



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# PROFESSIONAL LOCAL EAP



**Best available service**  
**Local EAP Administration**  
**EAP Professionals**  
**Knowledge of local services**  
**Familiar with work Organization**



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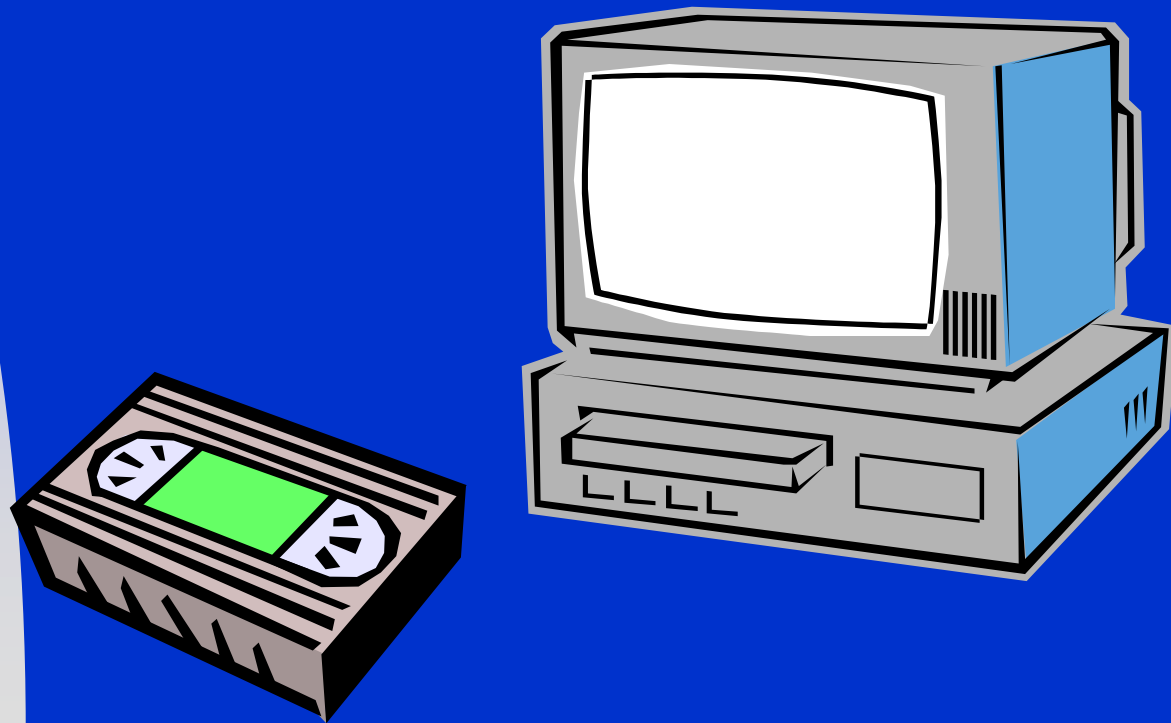
# 3 Ways to Refer

- Self
- Supervisor
- Mandatory
  - contact your HR EAP Coordinator
- Tip: See Your EAP policy



# EAP Success Stories

- Video Presentation:  
EAP Today



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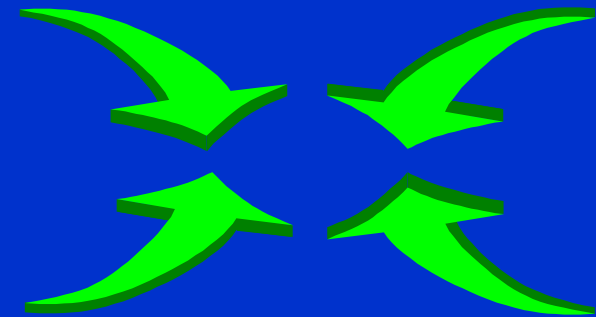
# Appropriate Referrals

- Chronic, on-going employee performance problems
  - Acute crisis, particularly if suicide or violent behavior is threatened
- **TIP:** *EAP is not designed to replace normal supervision or disciplinary action; it is an additional tool.*



# Your Role as a Supervisor

- Motivate
- Document
- Evaluate
- Coach
- Intervene & Refer



➤ **Tip:** Use your people skills but not your diagnostic “clinical” skills!



# Job Performance Indicators

- What are they?
  - Job performance
  - Behaviors





# Performance

- pattern of overall declining productivity
- increased safety breaches and accidents
- suspicious property losses
- decreased work quality
- increased errors
- increased time to complete
- missed deadlines
- conflict with co-workers or super



# Behavior

- changes in mood
- changes in personal appearance
- changes in habits
- isolation from workers and responsibility
- overreaction to real or imagined criticism
- increased negative comments
- increased personal calls



# Behavior (continued)

- unusual absenteeism or tardiness
- frequent or prolonged absences for work site
- preoccupation with personal concerns
- sleeping on the job
- financial problems
- borrowing money



# Steps to Making an Effective EAP Referral

- Be direct
- Identify the performance problem
- Stick to objective data
- Do not go into personal issues or diagnose the problem
- Do not threaten



# Steps to Making an Effective EAP Referral

- Be objective
- Remind about confidentiality
- Use the “Sometimes Speech”
- Regardless, follow up in 30 days for performance improvement.



# Barriers to Referral

- Supervisor barriers
  - avoiding conflict - using the 'hope method'
  - misguided sense of responsibility
  - supervisor's own problems
  - betrayal of the employee
  - fear of retaliation
  - others?

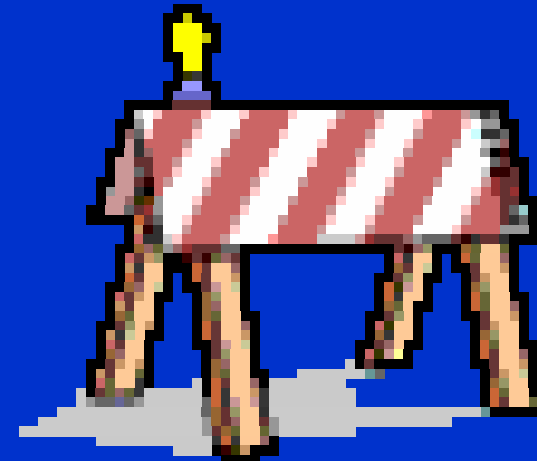


# Barriers (continued)

- **Employee barriers**

- Defensiveness

- Others?



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# What to Expect from Your EAP?

- Appointment scheduled within 2 - 5 business days
- Emergency appointments
- Feedback regarding attendance & recommendations, when employee signs release of information





# What to Expect from Your EAP?

- Monitoring of employee's follow through
- Consultation regarding performance issues
- On-site presence for crisis and conflicts
- Licensed and certified counselors knowledgeable in work and personal counseling



# What Your EAP expects of you?

- Phone call to discuss performance concerns
- Documentation of performance concerns
- Discussion with employee of those concerns
- Follow up with employee within 30 days to discuss improvements
- Maintain confidentiality



# What This Means

- EAP is one of the most effective management tool you have for resolving performance issues.
- Remember -
  - Refer Early and Routinely using the “Sometimes Speech”
  - ❖ *“The ultimate success of EAP rests with the supervisors.”*



# Evaluation and Questions

- What will you take away and apply to REAL LIFE situations?
- Is there anything we left out?

