

OUTLINE OF A FORMAL MANAGEMENT REFERRAL

What is a Management Referral?

A tool for Human Resources Departments to assist an employee when performance or behavioral problems negatively affect their job performance, and when normal corrective actions by the employer does not resolve the problem. Example: An employee who once was reliable experiences attendance and/or work performance issues. A Management Referral to the EAP can help the employee get back on track.

Step One. Before submitting the Management Referral form, a Referring Person call [520-575-8623 or 888-520-5400] Jorgensen Brooks Group [JBG] to speak with a staff clinician about the employee; their presenting problem[s]; to confirm if a referral is appropriate; or consider options for correcting the problem.

Step Two. If a Management Referral is to be made to JBG, submit a completed form [instructions below] to JBG.

Step Three. Fax [520-844-1156] the completed form to our offices. Once received, a JBG clinician will contact the Referring Person to discuss particulars of the case, and the employer's goals.

Important Things to Know

A formal Management Referral allows JBG to inform the Referring Person of an employee's attendance, and compliance with referral requirements and EAP treatment guidelines; requires a Release of Information signed by the employee prior to counseling. By Federal law, we cannot provide specifics of counseling sessions – they remain confidential between the employee and their counselor.

A formal Management Referral is a resource for employees who may be struggling. However, a formal Management Referral does not protect an employee from any disciplinary procedures the employer may decide are necessary.

JBG prefers that an employee participate in a minimum of two [2] EAP sessions in formal Management Referrals. Whatever number of sessions are necessary [to EAP contract limits], the EAP counselor determines if/when the employee achieves the goals of brief therapy.

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JBG Will Provide Information to the Referring Person

Minimally, JBG will have these interactions with the Referring Person:

- When requested, a consultation before their submittal of the formal Management Referral
- Confirm [email or telephone] receipt of the formal Management Referral document and review the employer's expectations [JBG: Within 2 business days]
- Confirm [telephone and email confirmation] that the employee has – **or has not** – made their appointment [JBG: Within 2 business days]
- When JBG is notified by the counselor of completion of the third EAP session [first session if a substance abuse referral], JBG will advise the Referring Person of the counselor's plan to continue care or to close the case [within 2 business days]
- At close of the case, JBG will discuss the EAP counselor's summary with the Referring Person; Following that conversation, JBG will close the formal Management Referral
- JBG will – at any time in the formal Management process – respond [within 1 business day] to calls or emails from the Referring Person