



Leadership | *Tip sheet*

# Seven Steps to Formal Management Referrals

## 1. Prior to meeting with the employee regarding performance concerns and formal management referral to the Lucet EAP, contact the Management Consultation and Support team (MCS).

On this call be prepared to provide the MCS clinician with:

- Your contact information
- Name of the employee being referred and their demographic information
- Reasons for referral (work performance issues)
- Actions taken to date

## 2. If you do not have a release of information (ROI), the MCS clinician will email one.

The ROI is to be signed by the employee being referred. The ROI will allow feedback between the MCS clinician and designated personnel; feedback is limited to compliance with referral, attendance and completion of sessions/recommendations.

## 3. Meet with the employee to:

- Address performance concerns
- Review expectations of performance and timelines/consequences of non-compliance
- Describe the formal management referral
- Assure of confidentiality

## 4. Direct the employee to call Lucet to be connected with an MCS clinician, who will be the primary point of contact through the formal management referral process.

## 5. The MCS clinician will facilitate a referral with a licensed counselor to address specific areas of concern.

## 6. The MCS clinician will notify management of initial contact made with the employee assistance program, and provide updates regarding follow through with recommendations and completion of recommendations.

Recommendations may extend beyond the company session model, if indicated.

## 7. During the referral, the MCS clinician will request updates regarding any ongoing concerns with the employee's performance, and if concerns have been addressed with the employee.

Please be aware that typically formal management referrals are voluntary unless your organization's policy states differently.

## ◆ Your well-being is our priority.

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