

# Tips for Supervisors in Referring Employees to *LifeSolutions*

## INTRODUCTION

Supervisors play a significant role in supporting employee use of the Employee Assistance Program. *LifeSolutions* provides coaching related to job performance issues as well as the counseling you are familiar with. This includes suggesting *LifeSolutions* to productive employees who share information about a personal challenge as well as for those who are in various stages of job performance decline.

The language used by a supervisor is important in setting the tone for the referral and helping the process move forward. The conversation will vary to some degree depending on the situation. The following suggestions are provided to support the supervisor in these discussions.

## NON-JOB PERFORMANCE-BASED REFERRAL

### Supervisor Suggesting *LifeSolutions* When Used

- No job performance issue
- Employee coming in about a personal issue or feelings of frustration related to his or her job
- Employee presenting beginning job performance concerns that do not warrant a job performance-based referral
- *LifeSolutions* as a **resource** for listening, support, and validation of feelings
- *LifeSolutions* Role - Connect employees with other resources to help with work/life needs

### I. Language to be Used

- *LifeSolutions* is a **confidential resource at no cost to you** or your household members.
- Work/Life resources are an area of specialty for them. They can help you figure out what you need and how to get it.
- They have offices near our facility and also near where you live.
- I won't know whether you go or not. **It is confidential.**

### II. Examples of scripts:

- Employee talking about the difficulties of parenting a teenage daughter
  - "*LifeSolutions* is available for support for **everyday life issues** – it can be helpful to talk with someone outside your circle of family and friends for an objective viewpoint and for support."
  - They can be "parenting **consultants.**"
  - It's free, confidential, and easy to access – just call 1-800 -647-3327.
- Work-related issue – employee has hard time saying no when coworkers ask too often for help and is stressed
  - "I encourage you to call *LifeSolutions* – they are "**good listening ears**" for both venting and coaching on assertiveness skills to help you be more successful in working with your team."
- Support and Work/Life issues – Employee stressed with caring for elderly parent and needs resources
  - "Call *LifeSolutions* for help with finding in-home services for your mom – they now help with a variety of work/life issues like eldercare. They can also give you emotional support as you struggle with being a caretaker."

## JOB PERFORMANCE-BASED REFERRALS

### FORMAL SUPERVISOR PERFORMANCE-BASED REFERRAL – VOLUNTARY USE ON PART OF EMPLOYEE

#### I. When Used

- **Beginning level** of job performance decline. Could be a verbal warning.
- Documented deteriorating work performance

#### Supervisor or HR needs to call *LifeSolutions* to make the referral

- **Use of *LifeSolutions* is voluntary for employee**; supervisor continues to focus on work performance

#### II. Language to be Used

- You are having difficulty being **successful at work**.
- I am recommending *LifeSolutions* **as a resource to you**. I want to do everything I can to help you be successful here.
- I am **not suggesting you need counseling**. What separates *LifeSolutions* from counseling you would get in the community is that *LifeSolutions* is **workplace-based**. They are experts in helping employees deal with whatever is going on so that you **can continue or will be able to be successful at work**.

#### III. Examples of scripts:

- Employee given verbal counseling about abrupt, disrespectful communication with coworkers
- Discussion about specifics of performance concerns
  - “I strongly suggest you call *LifeSolutions* as they are a resource to **help employees be successful in their jobs**. Communicating appropriately with your coworkers is an important part of your job and they can offer some **coaching** and support in helping you become a more effective communicator.”
  - I’ve called them to let them know I’m making a supervisory referral and what my concerns are, so they’re expecting your call. I told them you would call by (the date you tell the employee). *LifeSolutions* will call me if you have not set up an appointment by that time.”
  - “It’s entirely up to you whether you take advantage of this resource. There are no consequences if you don’t go.”
  - “If nothing else, you may want to use *LifeSolutions* to talk about your concerns regarding this discussion. What you say to the *LifeSolutions* counselor is **confidential** – the only thing they share with me is whether or not you attend sessions and if you are willing to follow their recommendations and then only if you give your permission to share this information.
  - “What I’m saying here (or bottom-line) is that **your performance needs to improve** (give some specific examples of what needs to change). Whatever you need to do to make that happen, I encourage you to do and if you feel *LifeSolutions* can support you in accomplishing this, by all means, give them a call. Here’s the number- 1-800-647-3327.”

## MANDATORY REFERRAL – REQUIRED USE BY THE EMPLOYEE

### I. When Used

- Gross misconduct, threats to personal or work-place safety or fitness for duty situations.
- Supervisor or HR calls the EAP to make the referral.
- **Employee is required to see EAP counselor** – failure to do so may result in job action up to and including termination.

### II. Language to Be Used

- You are required to see the EAP to figure out how to correct these problems.
- You must call the EAP within (time frame decided on by manager and HR).
- I will also be calling the EAP to tell them about this situation and what we expect of you.
- You are expected to
  - Do whatever the EAP suggests and follow the plan of action.
  - Sign a release of information so that I (HR or other identified individual when relevant) will get updates on your compliance with the plan of action.
- You are expected to correct the performance issues we've identified and EAP involvement will help insure that this happens.
- Discussion of Last Chance Agreement if and when that makes sense according to your policy.

### III. Example of script:

- Fitness for duty situation
  - “As part of the fitness for duty process, you are a mandatory referral to the EAP and need to call this number as soon as possible, **no later than the next business day (or whatever time line has been established)**.”
  - I will call the EAP to let them know of the fitness for duty situation so they will be expecting your call.
  - What you say to the EAP will remain confidential. I will be told only about your compliance with the plan of action.
  - You will be asked to sign a release of information so that the EAP can let me know of your attendance at sessions, willingness to follow recommendations, and if you need to be absent from work.
  - If you choose not to meet with the EAP or do not follow their recommendations, there may be job action up to and including termination.”