## Formal Referrals



A Formal Referral is made by HR or a Supervisor when an employee is strongly recommended to participate in the Employee Assistance Program (EAP) due to a documented performance or behavior concern. Confirmation of participation is requested by HR/Supervisor, but the EAP referral is voluntary. **There is no fee to the organization for the Formal Referral Process.** 

Connect with an EAP Management Consultant



## Here's how the process works

HR/Supervisor identifies a serious performance or conduct issue and contacts the Health Advocate EAP Management Consultant.

2

Consultant gathers referral details, including the employee's name and reason for referral.

3

HR/Supervisor meets with the employee to make an EAP referral.



Employee contacts the EAP or Consultant reaches out with the employee's consent.



An intake is completed and support is recommended.

6

Employee signs Release of Information (ROI) to allow the EAP to update HR/Supervisor.



Employee schedules with referred provider and signs ROI to allow provider to confirm participation to the EAP.



Consultant provides participation updates to HR/Supervisor.



Consultant monitors progress and follows up with the employee.



HR/Supervisor is notified when the employee has completed recommendations or disengaged.





