

# MAKING A MANAGEMENT REFERRAL TO THE EAP

## Manager's Guide to the EAP

Early intervention, taken at the first sign of a decline in performance, can help to get an employee back on track. There may be a time when a formal process needs to be followed in order to document that the workplace has offered a resource for assistance. This process is called a Management Referral. By following the Management Referral process the workplace can be a vehicle for helping to improve the performance of its employees.

### Step 1. Consult your Human Resources department

Make sure you understand and follow your company's policies and procedures.

### Step 2. Call the EAP

Call your toll free EAP number and ask to speak to an Employee Assistance (EA) Consultant.

Have on hand the employee's:

- Name
- Address
- Date of Birth
- Social Security number

The EA Consultant will use this information to open up a case.

### Step 3. Consultation

You can review with the EA Consultant the concerns you have about the employee's performance and develop a plan to address your concerns. Part of this plan could include a Management Referral.

### Step 4. Making the referral

The EA consultant will review the Management Referral Process with you. This will include:

- The Release of Information
- Employee access to EAP
- Compliance information and the follow-up process

### Step 5. Talking to the employee

As part of the performance discussion with the employee, you will need to review the Management Referral process. Include an explanation of Release of Information and how the employee can access the EAP. Summarize for the employee your performance expectations and plan for improvement. Remember to have your employee sign the Release of Information. You can fax or mail this document to the EA Consultant.

## Step 6. Provide instructions to the employee

The EAC will provide you with step-by-step instructions for the employee to follow during the Management Referral process. Direct the employee to call the toll free EAP number. A Personal Advocate will connect him/her to EAP services.

## Step 7. Consultation and follow-up

The EA Consultant will contact the EAP provider and review the reasons for the Management Referral. The EAP provider will assess the employee's situation, problem-solve, and make recommendations. The employee may be connected to the resources that can help him/her to resolve the identified performance issues. The EA Consultant will provide you with updates on the employees' initial compliance with the Management Referral.

Updates will include information on:

- Appointment made and kept
- EAP recommendations
- Initial follow through with EAP recommendations

## Step 8. After the management referral

Review with the employee all your performance expectations. Continue to offer feedback on both the employee's successes and areas of improvement. Intervene immediately on any change in performance. Remember that an EA Consultant is available to you for further consultation.

**About the Release of Information:** The Release of Information is at the core of a Management Referral. Through this release your employee authorizes the EA Consultant to give you updates about the Management Referral process. An EA Consultant will forward you a copy of this important document.

# EAP RESOURCES FOR MANAGERS AND SUPERVISORS

## Manager's Guide to the EAP

EAP support is always available to you by calling your EAP phone number. In addition, many helpful tools and resources can be found online. Managers have access to organizational tools and management resources, as well as individual benefits.

Find EAP resources for managers and organizations at: [Cigna.com/eapmanager](https://www.cigna.com/eapmanager)

### Consultation Services, Forms, and Resources

Educational materials, referral information and forms for all types of workplace concerns.

- › Management Consultation services overview
- › Referral information and forms
- › Resource Library of educational materials for a variety of workplace concerns

### Critical Incident and Disaster Support

Stress management materials and services to help employees cope in difficult circumstances.

- › Critical Incident Stress Management Services (CISM) overview
- › Links to Disaster Resource Center materials and information for members and managers

### Wellness Support

A wide range of materials to promote physical and emotional health and wellness in your workforce.

- › EAP Wellness Seminars and Management Trainings catalog
- › Onsite seminar or training request forms and information
- › EAP Wellness Webcast calendar of live and on-demand seminars with link to registration portal
- › The Well: resources and materials to build a culture of well-being
- › The Behavioral Awareness Series: free monthly seminars for individuals and families
- › Links to Coach by Cigna™ app, Healthy Rewards® and the Managing Stress Toolkit

### Promoting EAP

Tools and resources to help educate and engage employees in EAP.

- › Manager's Guide to EAP
- › Printed and digital promotional materials
- › EAP services videos
- › Recorded employee and manager orientations to EAP
- › Health and benefit fair request forms and information

Along with employees, managers and supervisors also have access to a wide range of benefits through the EAP. Resources available for you and your household may include the following (check with your HR department for your company benefits):

### Individual EAP benefits:

- › Face-to-face sessions with an employee assistance professional
- › Unlimited telephone consultations
- › 24-hour crisis line available seven days a week
- › Work/life support such as resources/referrals for elder care, child care, pet care
- › Financial services
- › Legal services

### Find EAP benefit resources at: [myCigna.com](https://myCigna.com)

- › First-time visitors will need to complete the one-time registration process.
- › If you're already registered on myCigna.com, you can simply log in.
- › Click on the **COVERAGE** link at the top of the page.
- › Click on **Employee Assistance Program (EAP)** in the drop-down box.
- › Online resources include:
  - Share access to EAP benefits with someone in your household
  - Live chat with a Cigna EAP consultant
  - Schedule a phone call with a Cigna EAP consultant
  - Get the information you need to make an appointment with a licensed EAP counselor
  - Find a licensed EAP counselor near you
  - Access to Work/Life Resources
  - Interactive assessment tools for stress, depression, fitness, and more
  - Access to live and on-demand EAP National Wellness seminars
  - Legal Resource Center with documents and legal information
  - Access to Cigna Education Series seminars on autism, substance use disorder, family behavioral health awareness, and eating disorders



### Your EAP is...

- Available to help 24 hours a day, 7 days a week
- Available to you, your dependents, and members of your household
- Provided at no cost to you
- Confidential

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