

## FORMAL MANAGEMENT REFERRAL GUIDE

FOR HR AND MANAGEMENT USE ONLY

**Description** A Formal Management Referral is designed to assist the employee in navigating issues in the workplace and improving job performance. Sessions are administered by a master's level clinician. The FMR process provides feedback on performance standards such as scheduling, attendance, and completion of EAP recommendations. A formal diagnosis or evaluation is not provided. It is at the discretion of HR/company to determine the employee's work status during and following the FMR process.

**Provider** Licensed EAP Provider

**Reporting** AllOne Health staff will provide updates to the referring source regarding:

- Scheduling
- Participation
- Completion of EAP recommendations

**Documents Needed to Initiate a Formal Management Referral**

- Formal Management Referral Form
- Copy of Last Chance Agreement, if applicable
- Copy of Performance Improvement Plan, if applicable

### Process to Make a Formal Management Referral

A Formal Management Referral should be made by the supervisor/HR while reviewing and discussing specific issues with the employee. It is our recommendation that this meeting occur between the employee and the leader making the referral. During the meeting, the supervisor/HR should provide a clear explanation as to why the referral is being made, the issues regarding lapses in work performance, policy violation, behavior, attendance/presenteeism, as well as what desirable outcomes would be.

It is important to have the Release of Information signed by the employee so that AllOne Health can begin communicating with the referral source immediately.

Telephonic consultation is encouraged and available prior/throughout the formal referral process. Please contact AllOne Health via the information at the top of this guide to initiate a consultation.

### What to Expect throughout the Process

Updates will be provided by AllOne Health regarding scheduling of appointments, attendance, and whether or not EAP recommendations are completed. Personal information about the employee will not be shared, nor will a determination be made regarding an employee's work status.

Throughout the process, if you have any questions/concerns, please do not hesitate to reach out to your EAP contact.