

Palmetto EAP Quick Checklist For Making Referrals

JOB PERFORMANCE – MANDATORY REFERRALS

*This is the recommended procedure before meeting with the employee
To discuss a referral to the EAP*

1. Gather documentation regarding troubled employee. For example, if it is an attendance issue, gather dates of violations, previous warnings etc. Look for patterns of tardiness, absenteeism. The Employer is responsible for investigating an issue and verifying the validity prior to making a referral.
2. Discuss with your in-house EAP point of contact (POC). This may be the HR Manager, Head of Occupational Health or other designee.
3. Either the EAP point of contact or the supervisor should contact the EAP Consultant to start the referral process. Please do not contact the Treatment Provider as mandatory referrals should all go through the EAP Consultant.
 - A. Complete the Palmetto EAP referral form.
 - B. Fax the referral form to 803-581-7331 or email to palmettoeap@truvista.net
Or you may call the EAP Consultant with the above information at 803--581-7327 (24-7)
4. The EAP Consultant will obtain an assessment appointment and notify the employer of time etc
5. Employer meets with employee to discuss situation: disciplinary actions taken, expectations for improved performance documented, and the referral to the EAP discussed.
6. Employer documents the meeting. Employee signs documentation.

This referral format is only needed when an employee is being referred due to a job performance problem and the employer would like feedback regarding their attendance etc. The EAP must have a signed written consent of the patient to provide this information. Please be aware that the names of anyone who will see the report need to be identified at the point of referral so that we can obtain the appropriate consent forms. Confidentiality laws prohibit the release to anyone other than those named on the consent and those on the consent may not discuss with anyone else.

SELF REFERRALS:

If you are just assisting someone in getting help through the EAP – i.e. the employee has mentioned to you in the break room that they are distressed over marital problems which have not affected job performance – then the EAP considers this a self referral. A self referral may contact the EAP treatment provider directly to make an appointment or may contact the EAP Consultant for assistance. The supervisor also may contact the EAP Consultant to assist the employee.