

Supervisor Referral Instructions and Forms

When an employee is showing signs of reduced productivity, absenteeism, erratic behavior or workplace conflict, **Ease@Work** can help. We will work with the management team and the employee to address a workplace concern. For **Ease@Work** to be part of an effective solution, we will require information as to the nature of the problem and an understanding of how the problem has been addressed prior to our involvement.

Initial response to performance or behavior issue:

Manager/Supervisor Responsibility	Employee Responsibility
Observation and documentation	
Discuss concern with employee	Discuss situation with manager
Outline expectations	Understand expectations
Identify obstacles & address as appropriate	Identify obstacles & address as appropriate
Make suggested referral to EAP if appropriate	Call 800-521-3273 to learn how Ease can help
Continue documentation and communication	Attempt to make requested change & communicate

The Management Consultation

If the employee performance or behavior does not improve despite efforts to address it as described above, call the Intake Department at 800-521-3273 for connection to your Account Manager or a counselor for a *management consultation*. This will allow us to gain an understanding of the situation and discuss ways Ease can assist with the situation.

In a **Supervisory referral**, the employee grants written consent for **Ease** to inform designated contact people about their participation in our program to address a performance or behavior concern. An **Ease** counselor confidentially assesses the employee to identify barriers which may not be apparent to the organization. Follow-up counseling sessions or referrals to other Ease services will provide the assistance necessary for the employee to overcome these barriers. The **Ease** Clinical Manager will provide updates on the employee’s progress and engage the designated contact person in becoming an active part of the solution.

Making a Supervisor Referral

1. **Choose the appropriate form for the situation.**
 - a. If the issue is **substance abuse**, use the form on page 2 and discard page 3.
 - b. If the issue is **work performance or behavior**, use the form on page 3 and discard page 2.
2. Complete the form entirely. All questions are vital in understanding the problem and expectations.
3. The employee’s signature on the form confirms that they have read the form and serves as a first line release of information. Without the employee’s signature, **Ease** cannot communicate with the designated contact person about any interaction involving the employee.
4. Once the form is filled out in its entirety, and sent to the HR Contact on the form (Company Representative), HR will send to Ease via confidential fax or email securely. If you need to send additional pertinent documents along with this form, understand that this information will become part of the client’s file in accordance with HIPAA guidelines. This means the client will have access to this information. Only send information that has already been shared with the employee.
5. Have the employee contact **Intake at 800-521-3273** (option 2 when prompted) to set up their first appointment by the deadline documented on the form. This allows **Ease** to know when to notify the designated contact person in the event that the employee does not call.
6. **Ease** will email the designated company contact after the employee calls to schedule their first session and again after the first session. The **Ease** counselor will obtain a second release from the employee which will allow the Ease Clinical Manager to report additional information to the designated company contact. The Clinical Manager will follow up with an email report.
7. The **Ease** Clinical Manager will monitor the employee’s progress. The designated contact will receive a written report at regular intervals by secure email.
8. Communication from the designated contact person is necessary in order for the counselor to understand whether the employee is making progress toward their performance/behavior expectations. A manager feedback form will be provided at the time of the liaison’s first communication to the designated contact person.

Substance Abuse Supervisor Referral Form *(skip to page 3 for Work Performance / Behavior)*

PHONE: 800-521-3273 (option 2)

The purpose of this referral is to assist in the compliance of policy and return to work.

Organization:		Referral Date:	
Employee Full Name:		Employee Title:	
Date of Birth:		Employee Dept:	
Home/Cell Phone:		Email:	
Home Address:			
Identify the reason for the substance abuse referral: <i>(Please check one)</i> <input type="checkbox"/> Pre-Employment Positive Screen <input type="checkbox"/> Employee Self-Disclosure <input type="checkbox"/> Reasonable Suspicion Positive Screen <input type="checkbox"/> Random Drug Testing Positive Screen <input type="checkbox"/> Post Accident Positive Screen <input type="checkbox"/> Return to Work Positive Screen <input type="checkbox"/> Aftercare following DOT referral completion <input type="checkbox"/> Refusal to test Job Safety Status: <i>(Please check one)</i> <input type="checkbox"/> Non Safety Sensitive Position <input type="checkbox"/> Safety Sensitive Position <input type="checkbox"/> DOT (Governed under DOT regulations) <i>If this referral is based on a DOT violation, employee cannot sign below</i>		Attachments: <i>(Check all that apply)</i> <input type="checkbox"/> Quantitative Results (required) <input type="checkbox"/> Last Chance Agreement or Employer Policy <input type="checkbox"/> Disciplinary Action <input type="checkbox"/> Reasonable Suspicion Checklist Return to Work Plan: <i>(Check all that apply)</i> <input type="checkbox"/> Employee can return to work upon the ability to test negative on a drug screen. <input type="checkbox"/> Employee can return to work while attending the primary program required by Ease@Work <i>(subject to Clinical Coordinator approval)</i> . <input type="checkbox"/> Employee needs to complete the primary program required by Ease@Work prior to returning to work.	
<i>Note that any recommended outside services will be the financial responsibility of the employee. For example, educational classes, treatment, testing, etc.</i>			
Additional Comments (if applicable):			
Employee must call 800-521-3273 (choose option 2 when prompted) by date:		Employee <input type="checkbox"/> can <input type="checkbox"/> cannot attend first appointment during work hours.	

Authorization for Release of Confidential Information

The above named employee authorizes **Ease@Work** to disclose to:

HR Contact Name:	Lisa Yeager		
HR Contact Title:	Senior Benefits Administrator		
Full Address:	1180 S. Main St., Akron, 44301		
Phone:	(330)643-8793	Fax:	(330)643-8625
Email:	lyeager@summitoh.net		
Additional Contact (if necessary):			
Name:	Traci Badock	Title:	Benefit Administrator
Email:	tbadock@summitoh.net		

I consent and request Ease@Work (division of AllOne Health) to release to my employer confirmation of the following:

- *I called to schedule an appointment and the date scheduled*
- *The appointment was/was not attended*
- *A description of issues affecting my ability to attend counseling sessions.*

Purpose of this disclosure: Coordination of referral and communication between the employer and Ease@Work.

I understand that information used or disclosed pursuant to this Authorization may be subject to re-disclosure by the recipient. I understand that this authorization is voluntary. I may revoke this authorization at any time by delivering such revocation in writing to **Ease@Work**. I further understand that **Ease@Work** may not condition treatment on my signing this Authorization. I hereby release **Ease@Work** from all legal responsibilities or liability that may arise from any use or disclosure of information made pursuant to this Authorization. This Authorization shall remain in effect for 90 days from the date signed, unless revoked earlier in writing. **I certify that I have read, understand and agree to this Authorization.**

Signature of Employee *(if DOT, employee cannot sign)*

Date

Signature of Company Representative listed as contact in above box

Date

PLEASE PROVIDE A COPY OF THIS FORM TO THE EMPLOYEE

Work Performance / Behavior Supervisor Referral Form

PHONE: 216-241-3273 (option 2)

Organization:		Referral Date:	
Employee Full Name:		Employee Title:	
Date of Birth:		Employee Dept:	
Home/Cell Phone:		Email:	
Home Address:			
Describe your concern regarding the employee's current work performance or behavior issues (attach additional sheets if needed):			
Provide information regarding the event(s) that led to this referral (attach additional sheets if needed):			
Define the expectations required of the employee to improve their work performance or behavior:			
What are the consequences of the employee not following through with work performance or behavior expectations?			
Has this been a recurring problem? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, explain:</i>			
Is this a Safety Sensitive Position? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Employee must call 800-521-3273 (choose option 2 when prompted) by date:		Employee <input type="checkbox"/> can <input type="checkbox"/> cannot attend first appointment during work hours.	

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Signature of Employee

Date

Signature of Company Representative listed as contact in above box

Date

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