

# EAP REFERRAL – GUIDANCE NOTES

## EXTERNAL USE

Please see below the guidance notes for making an EAP referral.

## WHAT DO YOU NEED TO DO?

### STEP 1

Clarify the situation with the employee in confidence. Please inform them of the availability of the Health Assured Employee Assistance Programme (EAP) which includes:

- 24/7 counselling helpline and where applicable, structured short-term solution focused therapy.
- Advice and information for practical legal, financial and medical matters.

Questions to consider that may be helpful:

1. Do you need to discuss the situation with Health Assured first for guidance in approaching the matter?
2. Is the employee happy to receive a voicemail/text or could that result in someone, unintended, finding out about the support?
3. How is the situation impacting the employee?
4. When would be the best time for Health Assured to make contact, ensuring they are in a private and confidential space?

### STEP 2

Complete the referral form with the employee, ensuring that explicit consent has been obtained.

#### **Employee Consent**

Health Assured is committed to the protection of all client data, and the transparent and informed use of the EAP Services. The referral process must be completed with the employee's involvement with clear consent to release information to Health Assured for the purpose of accessing support.

The referral process involves sharing personal contact details and case history which may include highly sensitive data (Special Category Data) including information about things such as health or sexual orientation. Employees are asked to confirm their consent to such by signing this form under the Employee Declaration section.

If an employee does not consent to the EAP Referral, please remind the employee they can contact the helpline on a self-referral basis.

---

STEP 3

Send the completed referral form to [counsellingadvice@healthassured.co.uk](mailto:counsellingadvice@healthassured.co.uk)

There is no need to follow a referral form with a telephone call to Health Assured, however if you would like to discuss a referral with a counsellor/advisor please call us on 0800 030 5182. We also ask that the referral is sent from a confidential email address.

---

WHAT HAPPENS NEXT?

Health Assured will contact the employee **within 24 hours** of receiving the EAP helpline referral form.

The counsellor will identify and offer the most appropriate support / intervention for your employee.

Health Assured will inform you whether contact has been made or if there have been any problems making contact with employee.

### EAP Helpline Referral Form

Please complete all the white boxes and return to Health Assured

<b>Company name / scheme number</b>	
<b>Authorised by</b> (Including telephone number)	
<b>Company address</b>	
<b>Employee name</b>	
<b>Employee address</b>	
<b>Employee date of birth</b>	
<b>Employee contact telephone number</b>	
<b>Is it ok to leave a message?</b>	

<b>History</b> (including the reason for the referral request and any presenting issues)	
<b>Best days and time to contact the employee?</b> (i.e. am/pm/eve/any)	
<b>Is a Therapy Report required by referring manager?</b> (optional)	
<b>Has the employee given explicit consent and signed the employee declaration below?</b>	

### Employee declaration

*(To be completed by the employee being referred to Health Assured)*

I confirm that I understand and consent to the personal details contained within this form being referred to Health Assured for the purpose of accessing EAP services. I have read and understood the FAQs and I acknowledge and consent for the referring manager to be informed if:

1. Support has been put in place by Health Assured
2. Support has been declined or deemed unsuitable
3. Health Assured have been unable to make contact with me on the contact details provided

If your employer has requested a Therapy Report (optional), do you consent to a progress and outcome report being provided? *\*please see below FAQs for details of what this includes.*

- Yes** – I have read the FAQs and consent to my employer being provided with a progress and outcome Therapy Report; or,
- No** – I do not consent to a progress and outcome Therapy Report being sent to my employer.

<b>Employee Name</b>	
<b>Signature</b>	
<b>Date</b>	

Should you wish to, you can withdraw your consent at any time by calling Health Assured on 0800 030 5182 or by emailing [counsellingadvice@healthassured.co.uk](mailto:counsellingadvice@healthassured.co.uk)

**Please Note:**

A proactive EAP Helpline Referral call can only be made if the employee has consented to receiving our call. It is important that this is discussed with the individual concerned by the referring line manager.

**To initiate an EAP Helpline Referral, complete the form and send to Health Assured**

<b>Please return by Email to:</b>	<a href="mailto:counsellingadvice@healthassured.co.uk">counsellingadvice@healthassured.co.uk</a>
<b>Tel:</b>	<b>0800 030 5182</b>

## EMPLOYEE FAQS

**What data will be shared with Health Assured?**

Only data that you want to share with your manager and are happy to be passed to Health Assured. If you have any concerns these can be discussed with your line manager, or alternatively, only disclosed directly to Health Assured once contact is established.

**What happens if I consent?**

The referral will be sent directly to Health Assured and we will arrange for the relevant counsellor/advisor to make contact within the agreed timeframe. During this call we will explain support options, gather further details about the situation and implement any applicable support.

**How will you use my data?**

Health Assured will use any data collected for the provision of EAP services, with all content being held confidentially within our secure case processing systems. Further details of how we use data are detailed within our Privacy Notice which is available at [www.healthassured.co.uk](http://www.healthassured.co.uk). For details regarding how your employer uses your data, please speak to them or look for their own Privacy Notices.

**What will be shared with my employer?**

Client confidentiality is at the forefront of everything we do at Health Assured, in relation to a EAP Referral and the support which is put in place, Health Assured will only report back to your employer to report whether:

- Support has been put in place by Health Assured
- Support has been declined or deemed unsuitable at this point in time; or,
- Health Assured have been unable to make contact with you on the contact details provided

**Are there any circumstances in which confidentiality would not be maintained?**

Although Health Assured protect confidentiality wherever possible, there are certain circumstances in which confidentiality must be broken.

- Risk of harm to self or others – if there is a legitimate concern for harm to self or others, then Health Assured will liaise with a client's GP to arrange additional support, or if required the applicable Emergency Service provider.
- Safeguarding concerns – where children or vulnerable adults are implicated, the local authority designated officer/social services department may be informed.

In extraordinary circumstances, where the risk relates directly to your employer, i.e. on site risk or where public interest outweighs confidentiality, we may inform your employer of details limited to that specific risk.

**Do I have to consent to an EAP helpline referral?**

Health Assured will not contact you unless you have consented. Alternatives include contacting us directly via the helpline or website in which case your employer will be removed from the process. If you consent but then change your mind, please get in touch with Health Assured or your employer and we will stop the referral process meaning that the requested support will not be put in place. Health Assured can be contacted directly through your helpline number or alternatively email [counsellingadvice@healthassured.co.uk](mailto:counsellingadvice@healthassured.co.uk).

## THERAPY REPORTS

We are able to provide Therapy Reports which detail the progress and outcome of your support to the referring manager, providing the employee has provided consent and the referrer has requested the reports in their initial referral form.

If you consent to a Therapy Report, your manager will receive an initial and final report that include the following information:

INITIAL REPORT (after 1 <sup>st</sup> session)	FINAL REPORT (after final session)
<p>What are the main presenting issues detected?</p> <p>Are the issues work related?</p> <p>Are there factors outside of work contributing to the issues?</p> <p>What is the goal of therapy?</p> <p>Can this be achieved in the sessions available?</p> <p>If not, what onward referral pathways have been or will be made?</p>	<p>Is the employee working or have they been able to return to work?</p> <p>If the absence is mental health related, has the individual been recommended to complete the HSE Return to Work Questionnaire with their employer?</p> <p>Number and dates of all sessions</p> <p>Number of sessions agreed</p> <p>Number of sessions attended &amp; DNA</p> <p>Was the goal of therapy achieved?</p> <p>Have further onward referrals been made or suggested?</p> <p>Are there any recommendations to the employee for their continual care?</p> <p>Any relevant or useful information in your capacity as a therapist?</p>

Progress and outcome reports are stored on our case management system and attached to an individual's case notes.