



# Confidential Care Managed Referrals

These guidelines are provided in addition to the Manager Adviceline leaflet. To access the Managerial Adviceline please telephone Confidential Care and ask to speak to a senior clinician.

Managed referrals are a key component of the Confidential Care EAP. CiC believes that this proactive approach to employee support is a highly effective route to successful workplace counselling. OH and HR professionals, line managers and other key people who support members of staff with work or personal difficulties can use these referral procedures.

## The Informal Referral Process

Managers and other key personnel within the organisation are in an ideal position to ensure that suitable help is provided in a timely manner for employees experiencing problems. Gentle encouragement for an employee to make contact with Confidential Care is an important informal referral process and key to maintaining usage of the EAP.

Managers can also take a proactive approach in ensuring that help reaches the employees when they most need it. Once it is agreed that the employee would welcome help from Confidential Care but is perhaps struggling to pick up the telephone, the manager or professional advisor can -- with verbal consent -- contact Confidential Care on the employee's behalf and ask our Adviceline Consultant to call the employee.

This type of informal referral works best if the employee can state the most convenient time and number for us to call.

In these situations, the manager or advisor should emphasise that they will not receive any feedback from

Confidential Care. Confidentiality is important to the success of the counselling.

There are, however, ways of reassuring the manager that help has been offered that also provides an all-important audit trail and complete records.

## Formal HR Referrals

On occasions, due to the nature of the employee's problem or the impact the difficulties may have on work performance or the organisation, a referral process is required whereby the referring manager receives appropriate feedback from Confidential Care.

To maximise the success of the formal referral process, the manager can use the Managerial Adviceline to discuss with one of the Confidential Care senior case managers how best to position the counselling support and what else, if anything, should be considered before offering support.

It is at this stage that the manager can clarify what the organisation needs to achieve from the process.

Transparency and informed client consent are key components to the successful referral. The manager can discuss with the case manager what feedback is appropriate and then agree this with the employee.

Feedback from Confidential Care to the manager is usually limited to confirming that the employee has taken up the referral and that support is in place.

However, specific circumstances might dictate that further information is required. This might include the focus of the counselling, if relevant to the referral (e.g. anger or time management issues). It might also include recommendations for additional support such as mediation or adjustments to the workplace or role.

Continued overleaf

**Please complete all necessary fields. Please scan and email these referral forms to [assist@cic-eap.co.uk](mailto:assist@cic-eap.co.uk)**

# Confidential Care Managed Referrals

## EMPLOYEE AUTHORISATION FOR A FORMAL HR REFERRAL

I agree to Confidential Care contacting me to arrange counselling. My manager and I have agreed to the following feedback being provided by Confidential Care.

- That I have taken up the counselling referral
- That the following issues will be the focus of the counselling

Employee name:	
Employee signature:	
Date:	
Referring Manager's Name:	
Job Title:	
Manager's signature:	
Date:	

In addition to the above, the feedback will be discussed with you during the counselling process. No further information will be given unless you explicitly agree this in advance with Confidential Care. The only exceptions to this will be if the counsellor considers there to be a risk of harm to either yourself or any other party. In these circumstances, we would endeavour to discuss this with you first.

Continued overleaf

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# Confidential Care Managed Referrals

Referring Manager's Name:			
Job Title:			
Office telephone number:		Mobile telephone number:	
Email Address:			
Signature of Referrer:			
Date:			
Employer:			
Name of Employee:			
Job Title:			
Home Address:			
Work Address:			
Contact Telephone Numbers:		Home:	
		Mobile:	
		Work:	
Email Address:			
Contact is preferred between: (time and date)			
Nature of the Employee's Issues			

**Please complete all necessary fields. Please scan and email these referral forms to [assist@cic-eap.co.uk](mailto:assist@cic-eap.co.uk)**