



Performance Based Referral Process

1. Collect and document information regarding performance and/or behavior concerns.
2. Consult with HR about the performance issue and the appropriateness of an EAP referral.
3. Contact VITAL WorkLife to consult with them around the circumstances surrounding the EAP referral and to walk through the process of making the referral. Please be sure to fill out the forms in their entirety, including specific examples of poor performance and desired behavior change.
4. Meet with employee and review the performance concerns—be clear about what changes need to occur—let them know you have spoken with the EAP.
5. Refer to the EAP as a resource for problem assessment and performance improvement.
6. The supervisor or HR has the client sign the referral/release form allowing VITAL WorkLife to communicate with company representative, and reviews the following:
 - a. Inform the client of the phone number to contact the EAP
 - b. Indicate how many days the employee has to set up their EAP appointment
 - c. Inform the employee of the need to follow the recommendations of the EAP and the potential consequences of not following through
7. The supervisor or HR faxes the release to VITAL WorkLife—(with the employee’s signature), being sure that specific behaviors are listed, and/or supporting documentation is sent along, e.g. past performance reviews, written warnings, etc.
8. Once VITAL WorkLife has received the release and the client has called to set up an appointment, the supervisor or HR is contacted to inform them the employee has initiated the process.
9. For the duration of the sessions and following the completion of the assessment, VITAL WorkLife contacts the supervisor or HR to inform them of the follow through by the employee, recommendations of the counselor, and the employee’s willingness to follow through with their recommendations.

****If the employee is recommended for chemical dependency treatment, the employee will need to get a new release signed at the treatment facility in order for the employer to communicate with the facility regarding the employee’s follow through.