

## **FORMAL REFERRAL**

A Formal Referral to the EAP provider is a managerial request for an employee to participate in coaching for a specific work-related issue. Formal referrals can:

- Create a positive way of handling performance issues
- Prevent problems becoming more serious
- Provide the employee with an opportunity to develop more skills
- Provide a clear and finite process for resolution of problematic issues

Formal Manager Referrals should be made when an employee's work standards are beginning to deteriorate and should be presented in a helpful and informative manner. Referrals are more likely to have successful outcomes when they are balanced between:

- a) Conveying a genuine concern for the employee as a person
- b) Holding the employee accountable for their behaviour

Formal Referrals are not usually part of a disciplinary process and should not be presented in this light.

The steps to be taken for Formal Referrals are

- 1) Call ACCESS Programs to discuss the situation and clarify the appropriateness of the issue for formal referral.
- 2) Document the specific performance issues for the employee and provide them with a copy.
- 3) Meet with the employee to discuss the performance issues and your decision to refer them to coaching. It should be emphasised that this is a voluntary, not mandatory process. The employee should be given the ACCESS Programs phone number and asked to call to make an appointment.
- 4) Advise the employee that feedback will be provided to the manager at the completion of the coaching process. It should be emphasised that feedback is limited to performance issues and that other non-work-related issues will remain confidential.

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**Partnership for organisational & individual wellbeing**

**Contact ACCESS Programs on 8210 8102 or 1300 66 77 00**