# TIPSHEET –
# EAP Associate Administration Induction

**Welcome**

Congratulations on accepting our invitation to become an EAP Associate for Assure Programs. You are now part of a national network of health professionals participating in the provision of psychological services to our EAP clients.

Our main reason for establishing this network of selected professionals was to extend the availability of quality Employee Assistance Programs to our clients. However another important goal we have, and which we hope is shared with you, is that the network is professionally enriching and of mutual commercial benefit.

This Tipsheet complements the Associate Administration Induction you will have completed. It can be referred back to as and when required. If this Tipsheet does not answer a question you have or you require further clarification on any matter, please do not hesitate to contact our **National Support Centre** on 1800 808 374 or at info@assureprograms.com.au for guidance.

**Associate Resource Centre**

Within our online Associate Resource Centre you will find all the materials you will need as an Assure Associate, including:

- EAP Forms for you to download
- Customer Organisations List
- EAP Resources and Articles

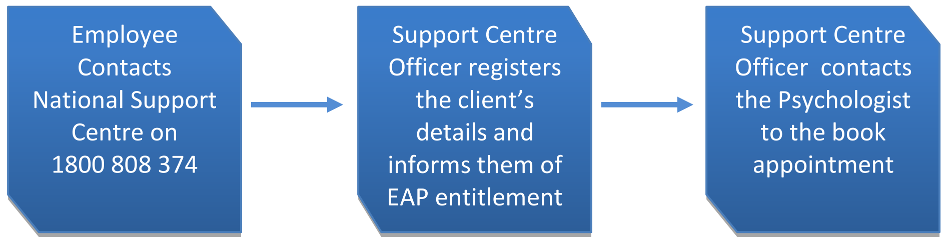
Prior to your Associate Administration Induction, you will receive an email from 'Word Press' with a link to our online Associate Resource Centre, a username and password.

Please contact the Associate Network Manager, Brooke Eagle, if you require assistance with logging into the Associate Resource Centre.

**Once you have access to the Associate Resource Centre, please ensure you read the 'mandatory reading' section of the EAP Associate Manual (located in the 'EAP Resources' section)**.

**How a referral comes to you**

First client appointment:




Subsequent appointments that a client is entitled to under their EAP can be booked directly between your practice and the client. Alternatively the client can contact our National Support Centre who in turn will contact you to schedule the appointment.

If a client contacts you directly please check with them by asking if they have 'registered' their details with Assure Programs. If they have yet to do this, you are welcome to make an appointment for them, however please refer the client back to Assure Programs so we can gather all necessary information and register their details in our system. <u>You must ensure they have registered with Assure Programs before the appointment takes place</u>.

Please have the Assure Programs National Support Centre number available in your office should a client wish to initiate their EAP entitlement or access at a later time.

**Client continuation post EAP entitlement**

When a client's EAP entitlement is exhausted, it may be that they wish to continue receiving counselling from you via a Mental Health Care Plan or as a private client.

While some other EAP providers do not permit their Associates to continue with EAP clients under private arrangements, Assure's policy is to support this as we believe it is benefical to the client's therapeutic journey to continue the relationship with the same counsellor.

You should create a new case file relevant to them as a MHCP/private client, and keep the case file relevant to them as an EAP client separate. That way, the case notes relating to the client whist they were utilising the EAP service, which contractually belong to Assure albeit remaining in your possession, are separate should a request for release of information be received.

Please be mindful that we do place restrictions on Associates contacting and building relationships with our customer organisations; please refer to your Associate Services Agreement for details of your obligations in this regard.

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| **Organisations with an EAP contract** | Assure Programs has numerous contracts with organisations nation wide. Each organisation has separate entitlements and services available to their employees. It's important to ensure you reference the details of the client's entitlement before meeting with them.<br><br>We have an up-to-date PDF list of all the organisations and their entitlement details, which is available on in our online Associate Resource Centre. The columns in the list are explained as follows:<br><br>• **Organisation:** Name of the organisation that clients are accessing through<br>• **Entitlement Renewal Date:** Annual date when the client's entitlement is renewed<br>• **Entitlement Name:** Outlines the separate entitlements each client can access under their organisations EAP contract<br>• **Units**: How many hours/sessions available to client<br>• **New Entitlement New Presenting Concern:** Organisations may allow clients to have a new EAP entitlement if they have a new presenting concern. E.g. seen for grief/loss then relationship concerns<br>• **Family Access:** Family Access listed as *'Yes'* means a family member of the employee has their own individual entitlement under the EAP. If Family Access is *'Shared'* the family member will share the hours of entitlement. The employee does not need to be at the session, a family member may attend alone. If the access is listed as *'No'*, family members cannot access the EAP. |
| **Documentation to be given to Clients** | 1. At or prior to the first consultation, you must provide the client with our **EAP Information and Record Management Policy**.<br><br>2. You should have the client sign the **Form A (Client Appointment Record)** and retain this on your client file. Please refer below for information regarding the Form A.<br><br>The Form A collects the personal details, the date and general comments of appointments you have with a client. The purpose of the form is to ensure a standardised version across our associate network that meets our Quality Assurance requirements.<br><br>**Please ensure the client signs and dates that they have received and read the Information and Record Management Policy.**<br><br>The Form A can be used as a running sheet, by attaching it to the inside of your client file. This is used for your client management use only.<br><br>Assure Programs doesn't require this form to be emailed unless it's requested. |

3. A DASS21 should be given to, and completed by, the client at their first and final consultations. Please refer below for information regarding the DASS21 Form.

   The DASS21 is a 21-item self report questionnaire designed to measure the severity of a range of symptoms common to both Depression and Anxiety. We use this data for anonymous statistical reporting.

   Please have each client complete the DASS21 Form prior to their first consultation, and after their last consultation. Use the DASS21 Scoresheet to calculate the score for each questionnaire completed, and provide the score on the applicable Form B.

**Form B1 / Form B2 (Consultation and Presenting Concern Forms)**

A Form B must be completed by the Associate at the end of each session. They are designed to ensure we collect all the appropriate statistical details of the client and appointment information.

**Form B1** - to be completed following the **initial** EAP consultation

**Form B2 -** to be completed following each **subsequent and final** EAP consultation

If the client did not attend their first consultation, please complete both a Form B1 and a Form B2 for their subsequent consultation.

**Family members**

- If a family member attends *with* the employee and both receive counselling – complete two Form Bs (one for the employee and one for the family member)
- If a family member attends for counselling *without* the employee – complete a Form B for the family member
- If a family member attends *with* the employee, but in support only (i.e. the family member is not receiving counselling) – complete a Form B for the employee only

If you are unsure of how to complete any section of a Form B1 or Form B2, please contact our National Support Centre on 1800 808 374 for assistance.

A Form B must accompany every invoice sent to Assure Programs. Failure to provide a fully completed Form B will result in payment delays.

**Form C (Extension Request)**

The request for an extension is available for providing further time to resolve or significantly improve critical issues and unresolved workplace issues. Extensions for family members are generally not approved as part of the organisations contracted agreement. If there is a significant impact on the employee and their work, you may like to discuss the extension with our Intake

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| | Psychologists.<br><br>The philosophy of the additional time requested is typically 2 Hours. EAP is a short-term counselling model and if we identify a presenting concern that would dramatically exceed the entitled hours it may be more beneficial for the client to transition to an alternative plan. You will be able to identify this need within the first or second session. If you require further clarification on the transition process please contact our Intake Psychologists via the National Support Centre.<br><br>If you need to submit an extension request, please complete all the fields on the Form C section **excluding** the case number; this number is allocated by Assure Programs to maintain confidentially when liaising with the organisation.<br><br>Most organisations are keen to gain some general understanding of work related issues impacting on individuals, especially those issues underlying the need for extended EAP support. To assist Assure Programs to obtain an extension, where possible could you please seek the client's permission for Assure's Intake Psychologist to discuss these work related issues in a general-sense-only.<br><br>Email Form Cs to info@assureprograms.com.au.<br><br>We cannot guarantee a turn-around time for Extension Requests as we do rely on the organisations approval, but we endeavor to provide an answer by the date required. |
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| **Form D (Authority for Release of Information)** | A Form D is required if a third-party has requested information pertaining to the clients file. It is not required to be completed as part of their general EAP counselling session.<br><br>Assure Programs require the client to sign the Form to authorise the release of their information to the third-party.<br><br>Assure Programs would like to ensure we keep a standardised process in delivering information relating to the client. The second section of the Form enables the Intake Psychologist Team Leader to provide and compile the relevant details for the request. Please refer to your Assure Programs State Manager/Service Delivery Manager before releasing any information to a third party.<br><br>Email Form Ds to info@assureprograms.com.au.<br><br>Please ensure all sections are complete before sending to Assure Programs. |
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| **Form E** | A Form E is required if the client wishes to request access to their own record |

**(Request to Access Client Record)**

and file. The request is charged at the recommended APS fee schedule. Please contact Assure Programs to confirm this rate.

Email Form Es to info@assureprograms.com.au.

Please ensure all sections are complete before sending to Assure Programs.

**EAP Feedback Form**

A bundle of EAP Feedback Forms and reply paid envelopes will be provided to you when you commence as an Assure Programs Associate. When you need more stock, please contact Brooke Eagle, Associate Network Manager on 02 9002 6372 or at brookeeagle@assureprograms.com.au.

We ask that you please provide each client with an EAP Feedback Form during or at the conclusion of their entitlement, and encourage them to provide feedback.

We find clients are most likely to provide feedback if they are asked to complete the Form while still at your practice. Please seal their Feedback Form in the reply paid envelope and post it back to us. Otherwise, if the client is more comfortable, please provide them with a Feedback Form and envelope to take away and complete in their own time.

Please reassure the client that their details are anonymous.

**Invoicing**

Please send your Invoice and fully completed Form B (either B1 or B2 as applicable) to invoices@assureprograms.com.au within five (5) days of each consultation.

Please ensure you include the following details on your invoice:

- Attention the invoice to 'Ingeus Australia Pty Ltd'
- Our address – Level 7, 345 Ann Street, Brisbane QLD 4000
- Name and Organisation of the client
- Date of the appointment
- Rate + GST (if applicable)
- If you are registered for GST, please ensure you add 10% GST to your invoices (if you are registered for GST you are obliged to charge GST when invoicing a third party/company and not the individual)
- Ensure each individual invoice has a unique invoice number

Subject to us being in receipt of a valid Invoice and Form B, invoice payment will be processed on the Friday before the 30 day payment term due date (or the actual payment term due date if it falls on a Friday).

If you have any queries relating to payment of invoices please email accounts@assureprograms.com.au.

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| **Other services** | **Critical Incident Stress Defusing & On-site Services**<br>At Assure Programs, "Critical Incident Management Services" (CIMS) refers to a range of psychological interventions and support. We provide services based on specific stressor, rather than employ a standard 'trauma' model. While part of this manual will naturally refer to critical incidents and potentially traumatic events, Assure provides many services which are 'significant/stressful' events.<br><br>If you have indicated that you are available to deliver these services on behalf of Assure Programs, when you are contacted by us about delivering such a service and you accept the assignment, you will be fully briefed at the time on the service delivery requirements and all applicable processes and forms.<br><br>**EAP Awareness Sessions and Lunchbox Training Sessions**<br>We occasionally engage the services of an Associate to deliver an EAP Awareness Session and Lunchbox Training Session on our behalf.<br><br>If you are contacted by us about delivering one of these sessions and you accept the assignment, you will be fully briefed at the time on the service delivery requirements and all applicable processes and forms. |
| **Keeping your details up to date** | If you have any changes to your business (location, ABN, staff changes, etc.) please inform Brooke Eagle, Associate Network Manager by email at brookeeagle@assureprograms.com.au.<br><br>Please be aware that we can only refer our EAP clients to Psychologists at your practice that we have approved and are recorded in our system. If you would like other psychologists at your practice to receive our referrals, please contact Brooke Eagle so their onboarding process can be initiated. |
| **Thank you** | Thank you for taking the time to familiarise yourself with our documentation and processes. You will now be activated in our system and we can start referring clients to you - we look forward to working with you.<br><br>Again, if you require any support please contact the following:<br><br>• **EAP and client related queries -** National Support Centre, 1800 808 374 / info@assureprograms.com.au<br><br>• **Invoice payment queries** - accounts@assureprograms.com.au<br><br>• **Notification of any changes to your practice / queries regarding your contractual agreement with Assure Programs** - Brooke Eagle (Associate Network Manager), 02 9002 6372 / brookeeagle@assureprograms.com.au |

***Version Control***

| Version | Description of change | Person making change | Date changes made | Date for next review |
|---|---|---|---|---|
| V1 | Creation | B Eagle | Jun 2014 | Jun 2015 |
| V2 | Update | B Eagle | Aug 2014 | Aug 2015 |
| V3 | Update | B Eagle | Sept 2014 | Sept 2015 |

The latest version is due for revision 12 months after the date of the last change. The document owner is responsible for the revision.