

Management Referral Product Training

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Overview of the session

- What is a Management Referral
- Why workplaces ask for this type of support
- What are the different options for feedback
- The common types of referral reasons
- The role of the Psychologist
- The role of the Triage Psychology Team
- Paperwork & Resources
- Examples

What is a Management Referral

A Management Referral is:

- A referral-based service that allows an employer to engage an employee in a targeted review and/or counselling
- It is a collaborative agreement with an agreed referral goal
- Generally initiated by the referrer when there is concern for the employees mental health and wellbeing
- A referral-based service that allows an employer to engage an employee in a targeted review and/or counselling

Why workplaces ask for this type of support

A workplace typically initiates a Management Referral when they recognise that a work, personal or wellbeing concern may be having an impact on the employee or their performance in the workplace.

The referrer wants to ensure that the employee has access to professional support to assist them in addressing their presenting concern.

The referrer is seeking recommendations from Assure on how to best assist and support the employee in the workplace.

What are the different options for feedback

There are four types of Management Referrals:

- Attendance Feedback
- Brief Feedback
- Summary Report
- Clinical Review

Attendance Feedback

- Feedback on attendance or non-attendance only
- Often initiated when a referrer wants to assist an employee to engage in support, but does not want any feedback on their progress towards the agreed goals
- Some customers use this service to approve additional services or allow non-eligible clients to access to the EAP (ie clients of our customers)

Brief Feedback

- Brief feedback following the initial and/or final session as requested and agreed to on the referral form
- The focus of the referral is specific counselling for a targeted area, with agreed goals
- Feedback will include attendance, progress toward agreed goal and specifically how the organisation can best assist the employee while they participate in the referral program
- Feedback can only be provided based on the parameters of the referral, with all other information obtained during the sessions remaining confidential

Summary Report

- Focus is the same as the Brief Feedback referral, however there is a request for the feedback to be provided by way of a brief summary report.
- A Summary Report is prepared at the completion of the counselling program
- The report will include results of any assessments carried out, treatment provided, goals achieved, outstanding treatment needs and recommendations on how the organisation can continue to assist the employee

Clinical Review

- The purpose of the referral is for a clinical review of the case to assess their functional capacity
- The assessment is usually 2 hours of face-to-face contact (completed in one or two visits), followed by 2 hours of report writing time
- The clinical review will result in a written report including an understanding of the functional impact of the referred concern, a review of current coping strategies, motivation to achieve the agreed goal of the referral and support recommendations
- Recommendations may include specific counselling for a targeted area, with agreed goals – which may lead to a further Management Referral (Brief Feedback or Summary Report type)

The common types of referral reasons

Referral reasons may include:

- Supporting an employee's return to work following a period of absence due to a work or non-work related event
- Building an employee's interpersonal communication skills to support their workplace relationships and performance
- Managing specific behaviours that have resulted in, or may result in performance issues if unmanaged; such as anger, drug & alcohol problems
- Supporting emotional difficulties that have resulted in, or may result in performance issues if unmanaged; such as panic attacks, phobias, depression or grief
- Addressing other concerns that are seen to be impacting an employee's health and wellbeing and/or workplace behaviour

The role of the Psychologist

Prior to the initial session, the Psychologist should review the case including:

- Confirming the referral type
- Reviewing the reason for referral and goal of referral
- Confirm signed consent has been obtained
- Check the case for any additional information provided by the Triage Psychology Team (recorded on the statistics tab or attached as a note)
- Contact the Triage Psychology team if they have any questions.

The role of the Psychologist in a Management Referral depends on the type of referral option.

For Attendance only:

- Schedule the appointments with the client to assist them with the reason for referral.
- Advise the Triage Psychology team if the client fails to attend an appointment and/or the referral finishes prior to the full entitlement

For Brief Feedback:

- Ensure that the counselling sessions focus on the reason for referral and agreed goal on the referral document
- Provide brief feedback to the Triage Psychology Team following the initial and final session using the questions on the statistics tab to guide your feedback, ensuring additional notes are provided.
- Ensure you email the Triage Psychology team to confirm completion of the statistics tab

The role of the Psychologist cont.

For Summary Report:

- Ensure that the counselling sessions focus on the reason for referral and agreed goal on the referral document
- Complete the summary report within 24 hours of the final session, noting if the agreed goal has been achieved
- Ensure the summary report addresses the agreed goals on the referral document, and provide recommendations for additional support from the Organisation (if applicable)

For Clinical Review:

- Ensure the clinical review assesses the reason for referral and the functional impact of this concern
- Ensure the clinical review is completed within 24 hours of the final assessment session

Phoenix and administration processes for all referrals:

- All referral information is added to the case, under the statistics tab. If the Triage Psychologist has additional clinically relevant information this will be listed here.
- All feedback is to be provided by completing the relevant statistics tab, answering all of the questions and providing additional notes.
- Once feedback has been completed in Phoenix, an email is to be sent to the Triage team to alert them of this.
- Time to provide brief feedback is included in the session time, additional time will be blocked in your diary for report writing.
- All feedback is due within 24 hours of the session.

The role of the Triage Psychology Team

Prior to commencing any Management Referral, the Triage Psychologist has conducted an MSP to confirm the relevance, agreed goal, consent and expectation of the referral.

Once a referral has commenced, the Triage Psychologist will:

- Confirm with the referrer that the program has commenced, and provide the date of the initial appointment
- Remain in contact with the referrer to provide ongoing support via the MSP throughout the duration of the referral
- The Triage Psychology Team will provide all feedback to the referrer - the treating Psychologist should not contact the referrer at anytime
- For attendance feedback referrals, the Triage Psychologist will confirm any non-attendance, and advise when a referral has been completed / closed

The role of the Triage Psychologist cont.

- For the brief feedback referrals, the feedback will be provided as well as recommendations for ongoing support
- For the written feedback referrals, the Triage Psychologist will review any report prior to releasing them to the referrer
- In addition to providing the report, the Triage Psychologist will provide further recommendations and assistance with ‘what next?’
- Once a Management Referral program has been completed, the Triage Psychologist will continue to provide support to the referrer via the MSP

Paperwork & Resources

There is a unique consent form for each referral type:

- Attendance Feedback
- Brief Feedback
- Summary Report
- Clinical Review

The Summary Report and Clinical Review templates are stored on the Wiki under EAP – Management Referral

Examples

Attendance Feedback

- Reason for referral: Significant change within the Organisation which has impacted the employee. The employee has transitioned to a new team with a new team leader.
- Support / management actions taken to date: Supported the employee with training. A number of discussions and check-ins have occurred.
- Goal of referral: To support the employee through the period of change, and transition to their new team / leader.

The counselling program allowed for 4 sessions, of which the employee attended 3. The employee did not attend the 4th session and when contacted advised they had forgotten. No subsequent session was required.

Brief Feedback

- Reason for referral: An internal investigation found inappropriate behaviours and communications in the workplace.
- Support / management actions taken to date: Employee has been placed on a Performance Improvement Plan to focus on behaviours and communication style.
- Goal of referral: To provide the employee with coaching aimed at developing tools and strategies to manage emotions in the workplace, as well as improve communication skills and resilience.
- The referral requested feedback after the initial and final sessions.

The referral was for 4 sessions of counselling. The client attended all sessions.

Summary Report

- Reason for referral: A client presented at our offices as agitated and aggressive. They were verbally abusive towards our staff and threatened them with violence. XX has reported ongoing distress following this incident.
- Support / management actions taken to date: Initial support immediately following the incident, and temporary adjustment to work role to remove customer contact.
- Goal of referral: Provide additional psychological support to xx following the traumatic incident in the workplace.

The counselling program consisted of 5 sessions, including 1 session for report writing. The client attended all 4 sessions.

Clinical Review

- Reason for referral: An altercation occurred between xx and a crew member, and continued until the situation escalated to violence by xx. Mr xx has not acknowledged his contributions to the situation which contributed to the escalation. Mr xx reported several personal stressors.
- Support / management actions taken to date: Previous support to manage emotions in the workplace.
- Goal of referral: To better understand xx's needs to assist him in maintaining appropriate behaviour in the workplace.

The assessment consisted of 4 sessions, 2 of which were allocated for report writing. Mr xx attended the assessment over two one-hour sessions, one week apart.

Questions?

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