Management Referral Process
Employee Assistance Program (EAP)
Workflow Process

Responsibility	Action
Human Resources/Manager	1. Human Resources/Manager identifies employee to be referred to the EAP due to Behavioral Health or Substance Use concerns 2. Calls Beacon EAP Workplace Consultant (EWC) at **877 397-1032** who gathers necessary information, including: • Employee's name and ID# • Reason for referral • Job performance issues • Follow-up timeline • Manager/HR contact information including email • Other information as needed
Beacon EAP Workplace Consultant (EWC)	3. Sends email to Human Resources/Manager with a Release of Information form/instructions and confirms follow up plan
Human Resources/Manager	4. Meets with employee to (a) address performance issues (b) obtain signed Release of Information (c) refer to EAP and specify time frame to make contact with the EAP 5. Faxes release form signed by employee back to the Beacon EAP Workplace Consultant (EWC) at 866-731-2247 6. Instructs Employee to call Beacon EAP Workplace Consultant (EWC)
Employee	7. Calls Beacon EAP Workplace Consultant (EWC) by deadline provided by Human Resources/Manager 8. Completes telephonic intake/assessment with Beacon EAP Workplace Consultant (EWC)
Beacon EAP Workplace Consultant (EWC)	9. Notifies Human Resources/Manager of contact/no contact within specified time frame 10. Refers employee for assessment with EAP affiliate
Employee	11. Meets with EAP affiliate for assessment
Beacon EAP Workplace Consultant	12. Consults with EAP affiliate on recommendations 13. Determines recommendations and communicates those to employee
Employee	14. Follows through with recommendations of the EAP
Beacon EAP Workplace Consultant (EWC)	15. Monitors employee's participation with EAP recommended plan and continues to provide updates to HR/Manager at agreed upon follow up timeline. 16. Closes the case when (a) it is mutually agreed upon by Human Resources/Manager and EWC or (b) there is a report to Human Resources/Manager that employee is no longer following through with EAP recommended plan.