



Manager's Program Guide

Employee Assistance Program
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Welcome

Creating a safe and productive work environment with engaged and enthusiastic staff is a common goal for managers and supervisors. Your program is here to support you on this journey with a variety of resources, tools and services that are free, confidential and available to staff and their household members.

When you or your staff experience work-related or personal issues, your program offers help for a variety of challenges including anxiety, critical incident response, depression, grief, manager support, relationship issues, stress, substance misuse, work-life services and more.

As a manager your job is to support your staff so they can maintain optimal work performance. Your program can be used to help you develop as a manager and also to assist your staff as they navigate through the ups and downs of life. This guide outlines the services available to you as well as those you can recommend to your staff.



Until you think about it, you don't notice how effectively Kathy has guided you to define, verbalize, and resolve your challenge. I was fortunate to benefit from her coaching during a recent life transition. Her coaching was instrumental in bringing clarity to my situation and helped me find great peace where I could not find it before. With her help, I was able to move forward with happiness and joyful anticipation of the great things that are ahead for my family and me.

– Member testimonial



Your program

Understanding your program

Your program offers something for everyone! Your employer is paying for this program to help you and your staff with a broad range of issues affecting mental health and emotional wellbeing, and it is also a valuable resource for celebratory life events such as welcoming a new baby, adopting a pet, purchasing a home, planning for retirement and more.

Key features

- Provided at no cost to you and your household members
- Completely confidential service managed by a third party
- Available 24/7/365

How you and your staff can use the program

For yourself

You can take advantage of the learning events and call your Workplace Support Services team to consult with specialists confidentially. Your program also provides critical incident response services for traumatic events in the workplace. See [page 6](#) for more information.

For your staff

When you become aware that a staff member is struggling with an issue and you are concerned about the individual's wellbeing, you can recommend the program as a valuable and helpful resource. See [page 23](#) for more information on an Informal Referral.

As a management tool

When you are concerned about a staff member's declining work performance, Workplace Support Services help you identify behavior patterns and ways to recommend the staff member seek help through the program. See [page 23](#) for more information on a Formal Management Referral.

Your program is here to help you when you need it. You can call anytime and speak to experienced and trained professionals who can help you respond to a range of workplace issues.

When to use your program

Part of being an effective manager is motivating your staff so they are productive and satisfied with their work. Occasionally, sensitive issues arise and you may need some help in handling them. Consider consulting with your program when:

- You are concerned about a staff member's welfare.
- Someone's work is suffering because of personal concerns.
- A problem surfaces or a crisis strikes.
- You encounter a situation that you are not sure how to handle.
- A staff member consistently arrives late to work.
- A staff member is diagnosed with a terminal illness or passes away.
- A staff member is transitioning back to work after an extended time away.
- You begin to suspect a staff member is experiencing personal problems at home.
- You think a staff member is either drinking or using drugs on the job.
- You are managing staff members in life stages that you are not familiar with.
- You are working with an emotionally distressed staff member.

Promoting your program

Creating awareness of your program is vital to helping your staff understand all of the free and confidential resources, tools and services that are available to them and their household members. In addition, promoting the program as a resource for helping people to manage the ups and downs of life helps normalize issues and decrease the stigma that can be associated with asking for help.

Establish awareness

Practice these tactics to ensure staff members know about the program.

- Bring it up in a staff meeting and distribute an informational program flyer or brochure.
- Send a link to the member website.
- Hang awareness posters and post digital signage in high traffic areas.
- Plan to communicate different aspects of the program to your staff on a regular basis, i.e., overall program awareness, work-life services, suicide awareness, etc.

Communicate accessibility

Make it clear how easy it is to access the program.

- Staff can explore the member website and quickly see all the no-cost features and benefits.
- Staff members can call the program number and the representative will listen and provide resources specific to the caller's needs. The call is completely confidential, and no situation is too big or too small.

Emphasize confidentiality

Make it clear that no one will know if a staff member has used program resources. The process is completely confidential for self-referring individuals.

Promote normalcy

Communicate to staff that everyone has ups and downs in life, and it is okay to seek assistance.

- Help staff members understand that the program is designed to help individuals live their best lives, so they can perform better at work and achieve a more satisfying quality of life.
- Share the monthly newsletter or visit the member website and find articles and videos that will resonate with your staff.

Once staff members have a clear understanding of the program benefits and how to use them, they are much more likely to seek help when they need it.

Navigating the counseling process

There are many misconceptions about what it means to talk to a counselor and the stigma associated with it is often the reason people do not seek help in the first place. However, therapy can help people manage issues, develop coping skills and learn how to improve themselves. Therapy is not just for mental health issues, it can help with support, education, guidance, and provide you with the resources to learn and practice new ways of coping.

Common reasons people seek therapy:

- To work on marriage issues
- To cope with a big life transition
- To develop better parenting skills
- To manage mood swings
- To improve career prospects
- To process grief
- To become more assertive
- To mitigate harmful thoughts
- To process trauma
- To gain a deeper understanding of themselves

Seeking guidance to work through a personal problem is just as important as receiving help for a medical issue. Your outreach to your program is completely confidential and provided by a third party. Your personal information is not shared outside the program unless you sign a release of information or if the law requires disclosure. When you are ready to get started, visit your member website to be connected with the right resource or professional.



It's been a difficult time for me. Katie is very positive, she's very helpful, and I just can't say enough about her. I'm so grateful to you guys for what you do. I greatly appreciate her service.

– Member testimonial



Manager support

Learning events

Learning events can be accessed on-demand or through onsite trainings and are available for supervisors and staff in the following categories: leadership, working well, emotional wellbeing, home and family, healthy living and specialty trainings.

Please visit your member website to access the following:

- *Annual live webinar calendar*—live webinars are presented monthly for staff and quarterly for managers. All webinars are recorded and posted on the member website for on-demand access.
- *The Options in Learning Training Guide*—with over 60 trainings on topics ranging from emotional wellbeing to healthy living and leadership, these courses are delivered in-person or in real-time via webinars.
- *Robust resources*—Clinically validated articles, videos, self-assessments and webinars on a wide range of topics such as anxiety, burnout, depression, financial wellbeing, mindfulness and more.

Workplace Support Services

Managers can use Workplace Support Services for confidential guidance to improve team dynamics and help staff in the most productive and appropriate manner.

Your program provides specialized Workplace Support consultants to help managers and supervisors to effectively assess challenging situations and determine the appropriate level of intervention based on departmental policies. Managers can call Workplace Support Services for a confidential management consultation on how to approach team dynamics or individual concerns including:

- Providing guidance on how to communicate a performance issue to a staff member.
- Explaining how to offer help in the most productive manner.
- Offering suggestions on how to approach a referral and identify important actions to document.
- Discussing options for dealing with a difficult situation.

A formal supervisor referral is a management tool that may be used to improve a staff member's work performance and resolve work-related issues. It may help the individual to address personal issues that may be contributing to the decline in work performance. An individual's participation in the formal supervisor referral process is voluntary. It is not intended as a disciplinary measure.

Critical Incident Response

When your workplace is disrupted by a tragic event, your staff may feel overwhelmed, anxious, unsettled and distracted. Tragedy has many faces, and each experience is unique. Our Critical Incident Response (CIR) team is here to support your staff with immediate and compassionate help, any time—day or night.

Note: Payment for CIR services varies depending on your program. Most CIR services are available on a fee for service basis. Please adhere to your organization's internal approval process prior to requesting this service.

What the CIR team does

When a traumatic event occurs, CIR services can help minimize the long-term effects on staff and the organization. Our centralized, dedicated team of specialists are clinical professionals specially-trained to handle sensitive situations.

The team is available 24 hours a day, 365 days a year, and has an average of 17 years of experience.

CIR counselors help staff process and cope with the emotional and physical impacts of a traumatic event by fostering their natural resilience, coping skills and strategies.

A broad range of services are available, and they are deployed according to your organization's unique needs. Services include Psychological First Aid (PFA), Management Consultations, group and individual support to affected staff members and telephonic crisis support.

Services are confidential and provide staff members with the resources and support they need to manage potential stress and return to their regular lives.

How CIR works

The first step is to consult with you on what happened and assess the situation. Once the situation is assessed and a plan of action is developed, we will send a counselor to your work site within an appropriate and agreed upon period. The counselor will conduct an onsite structured intervention to help manage the incident, when appropriate, and be available to management and individual staff members as needed.

What to do when a traumatic event occurs

When your organization or departments within your company experience a crisis or traumatic event, give us a call. We understand that you may not have all of the detailed information at the time of the first call, however, we do need specific information to assess the impact on your staff and to recommend the best response.

Questions to expect

- Contact information (name, title, phone number)
- Description of incident and affected staff
- Address of site or sites affected
- Date(s) and time(s) for requested onsite services
- Preferences (for example a specific provider)
- Number of staff affected
- Special needs, i.e., language, accessibility, etc.
- Any individual staff member concerns
- Impact on work performance
- Media involvement
- Types of interventions requested (group/individual/management consultation)

Please note: Magellan makes every effort to secure a counselor to come to your worksite at the requested date and time. Providing us with as much notice and details as possible helps to ensure fulfillment of your request.

What happens next

- Magellan will secure a CIR counselor.
- You will receive tip sheets with information on how to cope with traumatic incidents to share with your staff.
- The counselor will contact you to confirm details.
- Staff can contact your program if they would like to speak to a clinician prior to the arrival of the CIR counselor.

Staff support

Caring for your staff

Mental health matters. One in five Americans lives with a mental health condition. As a manager, it is important to understand the warning signs so that you can help get someone the help they need and potentially protect others in your workplace.

Trying to tell the difference between expected behaviors and signs of a mental illness is not always easy. There is no test that can let someone know if they have a mental illness or if actions and thoughts might be typical behaviors of a person or the result of a physical illness.

Warning signs of behavioral health issues

Each illness has its own symptoms, but common signs of mental illness can include the following:

- Excessive worrying or fear
- Feeling sad or low for a long period of time
- Extreme mood changes, including uncontrollable “highs” or feelings of euphoria
- Prolonged or strong feelings of irritability or anger
- Changes in sleeping or eating habits, feeling tired and low energy
- Avoiding friends and social activities
- Difficulty perceiving reality (delusions or hallucinations, where a person experiences and senses things that do not exist in objective reality)
- Misuse of substances like alcohol or drugs
- Thinking or talking about suicide

Knowing when to offer assistance

If you think someone has a mental health issue, you can help by:

- Making the staff member aware of the program and the support services it offers.
- Offering support to the staff member and encouraging them to contact the program.
- Contacting the program yourself, in your role as a manager or supervisor, to discuss your concerns and get direction from a Workplace Support Consultant.



Kathy provided me support through many pivotal growing experiences in the past year: getting a promotion, sharpening my managerial skills, and discerning my next steps. The support, guidance, and listening I received from Kathy are truly a gift and a privilege. Of all the professionals I have had the opportunity to work with inside and outside of this program, Kathy remains set apart from the crowd. I have learned a lot from Kathy and it has been an absolute pleasure to work with her.

– Member testimonial



Managing staff through a personal crisis

Over the course of a lifetime, every single one of us will deal with one or more personal crises. Whether it is a death in the family, a divorce, a loved one experiencing an issue, or something happening at work, a personal crisis can make emotions run high and it takes time and support to resolve.

When a staff member comes to you with a personal crisis, you are tasked with figuring out the best way to manage the situation, keeping in mind the needs of your staff member as well as your organization's goals and objectives. Being able to respond to staff situations in a fair, transparent and consistent manner is an important part of management. Adhere to your organization's policies and consult with your leadership as needed.

Every situation is unique, and these tips will help you handle a staff member who is having a personal crisis with grace and intelligence.

Listen and be compassionate

If a staff member comes to you with a personal crisis, it is important to give the staff member your undivided attention. If you are not able to do so immediately, assure the staff member that you understand the importance of the issue and schedule a time to meet as soon as possible. Listen respectfully and do not interject with advice or solutions until the person is done filling you in on as much as they are comfortable with.

Keep in mind the person's right to privacy. The person may just want a sounding board for things happening in their life or to tell you why a specific life event has affected their focus at work. If you immediately suggest a solution, the person may be put off because that was not what they were seeking.

Be empathetic about the situation but be careful to stick to the facts and avoid blurring the lines between work life and the staff member's personal life.

If a staff member doesn't come to you with a problem but you notice that they are suddenly behaving in a different manner than usual, it may be necessary to reach out to the person directly. Read the section in this guide on how to recognize the warning signs of a behavioral health issue. Follow the same tips for listening and staying empathetic.

Let the person know what it is that brought the matter to your attention so that they understand your concern and are aware of how it is affecting their work. This may be news to the staff member and may elicit a defensive response. Clarify that your purpose is to help figure out solutions to promote ongoing successful performance.

Remember, when someone is going through a crisis, they may not want to come to their manager for support for a variety of reasons. That is why it is important to build a culture of compassion where staff can feel comfortable reaching out for help when they need it.

Make sure work isn't the problem

In some cases, the crisis may be the workplace or workload itself. The person may feel overwhelmed with deadlines or they may be having issues with a coworker or the work schedule. If work is the problem, addressing the situation as soon as it appears may help you to avoid losing a good worker and identify a problem that could be causing your organization's turnover ratio to be higher than necessary.

Offer reasonable assistance

Sometimes the person will benefit from having a few personal days to sort things out. In these cases, putting in for leave time, adjusting a schedule and/or workload may be the simplest solution.

For situations that require more support, let the person know that you need to check on what's available to them, such as Employee Assistance Program benefits, medical insurance, paid leave, reduced hours, flexible schedules, counseling, health-related services, etc., before committing to an arrangement. Avoid going overboard to accommodate a staff member and stick to what you can reasonably offer without seriously affecting the business.

Check in regularly

It is possible that the person may need a few days to regroup after a crisis or to create a longer-term plan. Regardless of where things are in the solution process, follow up regularly with a call, quick meeting, or email. Make sure to communicate empathy and compassion, not pressure to return to work. This will help build your relationship and give you a better sense of how they are coping with the situation. Regular check-ins increase the likelihood that you will get honest feedback and ensure the person is getting the help they need.

Develop a plan

You may need to make temporary arrangements to reduce and/or modify the persons' workload. This may take some creativity to achieve and needs to take the workload and other team players into consideration.

Workload planning

Be realistic about what you can accomplish when you develop a temporary plan to move work onto other staff members and/or delay work. Identify all of the responsibilities and tasks that need to be covered, plan for the longest anticipated coverage period and how to adjust as the situation changes. Work coverage could include reallocating resources internally, finding a replacement and/or hiring additional workers. You will need to help team members find ways to accommodate the increased workload and reward them for their commitment and willingness to take on new tasks.

Staff impact

If staff members ask about the person experiencing the personal crisis or why their workload is being increased, you will need to be discreet. Present pertinent facts about the situation as it relates to the workplace and let team members know you are available to meet with them. This will show the team the situation is under control and reduce rumors.

Source: "How to Manage an Employee Who's Having a Personal Crisis." Inspired Trades Business Coaching - Coaching Programs and Accounting Services for Building Trades Businesses, www.inspiremenow.com.au/news/article/1170-how-to-manage-an-employee-who-s-having-a-personal-crisis.

Helping a staff member in distress

We take our humanity to work every day. We experience joy, laughter, sadness and more in our personal and work relationships. Dealing with emotions at work is unavoidable. If you notice sudden changes in a staff member's behavior such as increased absenteeism, an inability to focus at work or unusual emotional upheavals, chances are these sudden changes indicate emotional distress, and in some cases a serious behavioral health condition.

The following tips will help you recognize distress symptoms and understand how to reach out and help staff resolve their issues.

Read emotional cues and signals

Pay attention to the emotions and feelings expressed by your staff. Things to pay attention to include body language, facial expressions and tone of voice.

Listen and empathize

Listen closely and think before you react to the situation. When you approach a staff member, or they come to you, it is an opportunity to strengthen your relationship by learning more about what is bothering them and giving them support. Be careful not to react too quickly and fall into a collegial comfort zone by making light of the issue or telling them to just deal with it.

Understand the triggers

Remember that the emotional distress that is being displayed is usually triggered by underlying issues. Ask about what is driving the distressed response, i.e., *"You don't usually react that way in meetings, is there something that is bothering you right now?"* Be careful not to pre-judge the situation. Instead, focus on listening to the person's concerns and making them feel heard and respected.

Transform the problem into a positive change

If a person becomes emotional, comment on the person's strengths while communicating hope and support. Once the problem is identified, the next step is helping the staff member find a solution.

Keep their dignity

When someone is going through a tough time and you are talking to them about it, it is important to give them space to process their situation and keep their self-respect. Most people will already feel embarrassed that their manager is learning about their situation and no one should be made to feel bad about becoming emotional or crying.

Note: If the staff member's emotions have become unmanageable, this could affect other staff (excessive anger, harmful/abusive behaviors, etc.) and a different approach may be needed. Options could include formal counseling, conflict resolution/mediation and/or disciplinary action. It is not okay for staff (or managers for that matter) to express their emotions in ways that hurt or frighten others and if this is the case you should consult with your human resource department and Workplace Support Services team through your program.

Reframe your messages

Staff members can be deeply affected by how you respond to a situation. If you react too quickly and use poorly chosen words or a negative tone of voice, it can be a source of damaging emotions. Listen closely so that you are responding to the right things. Think before you speak and consider how what you say will be perceived. Frame your message in a positive way that is respectful and gives the staff member hope.

If, upon reflection, you think you could have had a better response to a staff member, own it. Saying, *"I'm sorry, I didn't respond as well as I would have liked, can we try having that conversation again?"* is likely to earn you increased respect and lead to a better resolution.

Source: Ainomugisha Gerald, Gerald, et al. "Best Strategies to Manage an Emotional Employee." *The 6Q Blog*, 12 Apr. 2019, inside.6q.io/manage-an-emotional-employee/

Preventing violence (at work and at home)

Workplace violence

When a work environment is in danger, staff members may feel vulnerable and uneasy. Violence prevention is key to avoiding a potentially damaging situation. Our experts can help you create a plan or provide immediate support resources when needed.

Call your program and ask to speak with a Workplace Support consultant about any signs of violence you may have noticed within your work environment. They are experts in dealing with these situations and can offer suggestions and help create a plan to deal with any threat of violence in the workplace.

Although there is no absolute predictor of who will become violent at work, there are some behaviors that are associated with workplace violence:

- Use of direct or veiled threats toward self or others
- Use of email to make threats toward self or others
- Intimidating, bullying or aggressive behavior
- Harassment
- Ongoing conflicts with supervisors or coworkers
- Bringing a weapon to the workplace
- Extreme change in behavior
- Explosive outbursts of anger or rage

Violence tends to escalate through a specific pattern. It is important not to tolerate any form of violence in the workplace and to prevent it from advancing to the next level.

Self-harm

Workplace violence can also take the form of self-inflicted violence. If a staff member mentions or suggests that they are thinking about self-harm, it is important to take this seriously. There are immediate resources available for someone who is feeling this way. Seeking help through Workplace Support is critical to reducing the risk of self-inflicted violence. No question or situation is too small for Workplace Support consultants. If you are not sure about the situation, call your program for a quick consultation—any time, day or night.

Domestic violence

An abusive relationship at home can transfer to the workplace as well. Victims may be dealing with an untrustworthy partner who follows them to work and displays stalking behavior. It is estimated that nearly one in four women are abused by someone they know. Although it is not your role to counsel staff members about their personal relationships, it is your responsibility to provide a safe work environment.

Signs of domestic violence include:

- Preoccupation or lack of concentration
- Increasing or unexplained absences
- Receiving harassing phone calls
- Bruises or other injuries that are unexplained

An alert and supportive manager or supervisor can make a difference. By recognizing the signs, consulting with your Workplace Support consultant, and helping the staff member with getting the right help at the right time, you can help the staff member and reduce any risk to the workplace.

Suicide awareness and prevention

The suicide rate among the US working age population increased 34 percent during 2000 – 2016.¹ This makes the workplace an important space for suicide awareness, prevention, intervention and crisis response.

There are National Guidelines for Workplace Suicide Prevention that include recommended practices for addressing suicide prevention in a comprehensive way and provide a roadmap for workplace leaders who wish to engage in a culture-change process. The guidelines were developed by a collaborative initiative between the American Foundation for Suicide Prevention, American Association of Suicidology and United Suicide Survivors International.²

With the increasing rates of suicide, it is important to know the warning signs and what to do when someone threatens suicide. When someone in the workplace, or a family member, client or vendor attempts or dies by suicide, those that are left behind are often left feeling a mixture of grief, trauma, and guilt that can linger for a long time.

Warning signs of suicide in adults

Take any mention of suicide seriously. You can take steps to prevent a suicide attempt. Be willing to listen and help the person find help. Don't be afraid to ask, "*What is the matter?*" or bring up the subject of suicide.

It is hard to know if a person is thinking about suicide, however, you can look for warning signs and events that may make suicide more likely.

Research shows that people may be more likely to attempt suicide if they:

- Are male.
- Have attempted suicide before.
- Have a family member who has attempted suicide or who has died by suicide.
- Have had or have mental health problems such as severe depression, bipolar disorder, schizophrenia, or anxiety.
- Drink a lot of alcohol or use drugs.

- Have been through family violence, including physical or sexual abuse.
- Are older. Older Americans have the highest suicide rate of any age group.
- Are veterans or members of the armed services.

Events that may put people at greater risk for suicide include:

- Changes in life such as the death of a partner or good friend, retirement, divorce, or problems with money.
- The diagnosis of a serious physical illness, such as cancer or heart disease, or a new physical disability.
- Severe and long-lasting pain.
- Loss of independence or not being able to get around without help.
- Living alone or not having friends or social contacts.

Adults who are at risk may show these warning signs of suicide. They may:

- Plan to or say they want to hurt or kill themselves or someone else.
- Talk, write, read, or draw about death, including writing suicide notes and talking about items that can cause physical harm, such as pills, guns, or knives.
- Say they have no hope, they feel trapped, or there is no point in "going on."
- Buy guns or bullets, stockpile medicines, or take other action to prepare for a suicide attempt. They may have a new interest in guns or other weapons.
- Drink more alcohol or use drugs, including prescription medicines.
- No longer want to see people and want to be alone a lot.
- No longer take care of themselves or follow medical advice.
- Give away their things and/or hurry to complete a will.

What to do when someone threatens suicide

Many people who attempt suicide don't really want to end their lives but see no other way to escape their pain.

What you can do

- Tell the person you're concerned about them.
- Ask the person if they have been thinking about self-harm. Do they have a plan? You aren't "planting" the idea of suicide by asking direct questions. The more detailed the plan, the greater the immediate risk. If the answer is yes, you need to get professional help, even if the person argues or resists. Think about what you would do if you suspected someone was having a heart attack in the workplace. Self-harm is just as serious of a concern.
- Don't leave the person alone. Talk with them about your concerns and show that you care and want to help.
- Listen to what they have to say. Don't act shocked, judge or swear not to tell anyone else.
- Remove dangerous items such as firearms or medications.
- Call your program. Do not send the staff member home without first speaking with a licensed clinician.
- Call, text or chat with the 988 Suicide & Crisis Lifeline to be connected to trained counselors. The service is available 24/7/365.
- Call 911 if the person is in immediate danger.

1. *Suicide Increasing Among American Workers.* (2018, November 15). Retrieved from <https://www.cdc.gov/media/releases/2018/p1115-Suicide-american-workers.html>
2. *Make suicide prevention a health and safety priority at work.* (n.d.). Retrieved from <https://workplacesuicideprevention.com>

What not to do

Avoid these types of statements:

- *"How could you think of killing yourself? Your life isn't that bad. Other people have it a lot worse than you."* This is a judgmental statement that shows no understanding or willingness to listen to the person's inner pain. Even if on the surface the person appears to have a good life, they are experiencing something unbearable that prompts thoughts of death as the only solution.
- *"Suicide is selfish and cowardly. How could you hurt us like that?"* The person already feels guilty. Piling on more guilt and shame will only make them feel more worthless and close the door to further conversation.
- *"You don't really want to die. You're just looking for attention."* Anyone who displays suicidal thoughts or behaviors should always be taken seriously.
- *"You have so much to live for."* People who are suicidal feel so hopeless that they can't see anything positive about their future. While this remark is well-intentioned, it fails to acknowledge the person's emotional turmoil.

If you suspect that someone is at risk for suicide, trust your instincts and take the threat of suicide seriously. Call 911. It is a matter of life or death.

Identifying substance misuse

In addition to the risk substance misuse poses for the individual, it also has significant consequences for the workplace. The effects of substance misuse on the job have a far-reaching impact on the profitability of a business. When a person is under the influence of alcohol or drugs, it can lead to accidents, inefficiency, reduced productivity, high stress and other issues.

If there is a concern about drug or alcohol use, it is important to take action. Your program can help you identify the behaviors or work performance issues that may require intervention.

Once you suspect a substance use problem, you can consider these steps:

1. Consult with the human resources department about your organization's substance misuse policy and testing procedures.
2. Focus on the staff member's performance and observable behavior. Do not make accusations or diagnoses about substance use.
3. Document the behavior, the performance issues and the observable signs of alcohol or drug use.

If you or a staff member is struggling with addiction and it is taking a toll on work and home life, help is available. Your program can help you start a conversation with your staff member that is struggling with substance misuse and will work with you to explore strategies for dealing with the problem.

Transitioning staff members back to work after a leave of absence

Usually when a staff member leaves work for an extended period, whether two weeks or two months, the leave is triggered by a life event or transition. There are different types of leave—some are employer-sponsored and others are mandated by law.

Reintegrating into the workforce following a prolonged absence is an important process and your Workplace Support consultant can help in making the staff member's transition back to work successful.

Returning to work

Returning to work after an extended leave can be challenging for a staff member. Being proactive can make the staff member's return easier. Listed below are some practical tips to help with a transition back to work.

- If possible, as the staff member is planning their leave, discuss ways they may stay in touch with the office. For example, regular email correspondence so they can be kept updated on what is happening at the workplace. This connection reinforces the link back to the workplace and can be very helpful in mitigating the anxiety a long absence from work creates.
- When notified of a staff member's plan to return to work, set up a meeting with the staff member to discuss a return-to-work transition plan. In this meeting, clarify any concerns the staff member may have and identify if there are barriers to returning to work that can be addressed in preparing for the return.
- Schedule meetings with all appropriate co-workers/ departments for a "catch-up" meeting.
- Request training assistance from human resources, if needed by the staff member.
- Talk with the staff member about any needs for work accommodations or modified duty. Make sure these issues are addressed well in advance of the staff member's return.
- Talk with the staff member about communication with co-workers. Discuss how much information the staff member wants to share with co-workers to help with the transition. Be respectful of the staff member's privacy needs.
- Consider inviting the staff member to lunch or a meeting with you and the staff member's co-workers prior to return to work. This may help the staff member feel more comfortable and connected prior to returning to the office.
- Encourage the development of a written return-to-work plan that includes commitments to the plan by all parties.
- It is normal that the staff member will experience anxiety or worry when returning to work. Reinforce the importance of self-care and setting realistic expectations to the staff member. Expect to allow some time for adjustment issues. Encourage the staff member to consider using the program for help.
- Consider all components of your organization's staff member supports, such as work-life resources, specialty programs for specific conditions and other programs that may be available to help the staff member in navigating this life transition. If you are not sure of the full span of resources that may apply, consult your human resource representative, or call the program for more information or ideas.
- Keep communication open between you and the staff member.

Transition staff members back to work following a substance misuse leave

Treatment is the first step in recovery from a substance misuse problem. The program provides several supportive tools and resources that are available for staff members and for supervisors. Staff members with substance abuse concerns who access the program are also provided:

- **Structured follow-up**—To help a staff member sustain recovery, your Workplace Support consultant will set up a structured follow-up plan consistent with the staff member's needs. This program provides the most support when chance of relapse is highest.
- **Recovery monitoring for supervisor referrals**—Recovery monitoring services combine recovery support with treatment compliance monitoring.* In the case of mandatory referrals, the Workplace Support consultant makes regular contacts (at least monthly) with both the staff member and the treatment provider to confirm continued participation in any agreed-upon treatment plan.
- **For supervisor referrals related to substance misuse**—The program regularly provides compliance information reports to the designated employer representative to aid in any corrective action procedures relating to the staff member's substance abuse. The combination of recovery monitoring and employer support is a powerful way to help staff members remain on their path to recovery.

* Compliance monitoring is provided only when the staff member signs an Authorization to Use or Disclose Information form authorizing the program to share treatment compliance with the employer.



Thank you so much for these resources! And thank you so much as well for taking the time to speak with me last week. I wanted you to know that that made a big difference for me, truly. That was the lowest and the most helpless I've felt in a long time, and it helped immensely to be able to call and speak with you.

— Member testimonial



Addressing performance issues

Sometimes work or personal problems can affect a staff member's work performance. As a manager, one of your responsibilities is to ensure that your staff perform their jobs in a satisfactory manner according to their job specifications. When addressing performance issues, practice these tips.

Identify expectations

- Define specific expectations of the staff member based on their job description.
- Convey concise, detailed information.

Specify performance concerns

- Point out where performance has slipped compared to past work and behavior. Be honest and firm.
- Give specific, objective examples with dates, times and situations.
- Emphasize the seriousness of the situation.
- Focus on the job, not the individual.
- Avoid making judgments.
- Keep the discussion focused on work performance, regardless of the staff member's response.

Schedule timelines for improvement and a follow-up meeting

- You and the staff member should jointly agree on an action plan based on the staff member's input and your guidance.
- Establish a timeline for improvement, appropriate to the level of the problem.
- Determine and agree on desired results.
- Set a time, date and place for the next meeting.

Describe consequences*

The staff member needs to know that their performance problem is a serious situation and what they can expect if work expectations are not met. At this point, you should:

- Be specific without threatening.
- Be prepared to follow through if performance does not improve.

- Emphasize that the staff member is responsible for resolving the present situation and avoiding future consequences.

**Be sure to consult with your human resources department prior to communicating consequences to ensure that any job action is consistent with internal policy and procedures.*

Recommend the program

- Reiterate your confidence with the staff member and reinforce that your goal is to help them become productive again.
- Remind the staff member that you do not need to know of personal problems, but you can encourage the use of the program explain how it can help.
- Provide information about the program, emphasizing that it is a confidential resource available free of charge to address any personal problems the staff member may be having.
- Refer the staff member to the program. Help in making the call if necessary.
- Explain that the program is confidential, and no personal or private information will be provided to anyone without the staff member's written consent.

Note: You may wish to call your Workplace Support consultant to discuss confidentiality issues and Authorization to Disclose procedures.

Managing a constructive confrontation

Constructive confrontation is a technique that allows you to objectively address performance issues. Constructive confrontation offers the opportunity to combine a discussion of the performance problem with a genuine offer of help.

The first confrontation is meant to provide constructive, candid feedback about work performance; which is presented in an objective, factual manner. It is not meant to be a negative, emotional exchange. The order of the meeting is an important connector to the effectiveness of this technique. When the discussion has ended, there should be specific action items to be completed by both the staff member and supervisor.

Preparation will be the key to a successful constructive confrontation and should include the following:

- Be respectful of privacy. This type of discussion should be conducted in a private setting and should never be held in the presence of or within listening range of others.
- Consult with your human resources department to ensure your meeting is consistent with your organization's specific policies and procedures.
- Gather and organize your documentation so it is available during the discussion.
- Be aware of your own expectations. Define acceptable and unacceptable performance.
- Focus on behavior. Do not label or diagnose a personal problem either in your mind or at the meeting.

Four steps for a constructive confrontation

A constructive confrontation includes four components. These steps, outlined on the following pages, illustrate how to conduct a successful constructive confrontation.



1. Reinforce the staff member's value

Begin the meeting by highlighting the staff member's value. Ways to show the staff member's value can include:

- You have noticed a change in work performance.
- Your concern today pertains to this change.
- The change is not typical of past work habits.

Acknowledge the staff member's past and present good performance. It is important to:

- Let the person know of their value to the organization.
- Give examples of past and present contributions (e.g., years of service, past performance, technical skills, earlier level of dependability).
- Tell the staff member that you appreciate these contributions.

2. Address work performance and expectations

The key to this part of the meeting is to remain calm and objective.

Identify expectations:

- Define specific expectations of the staff member based on their job description.
- Convey concise, detailed information.

Specify performance concerns:

- Point out where performance has slipped compared to past work and behavior. Be honest and firm.
- Give specific, objective examples with dates, times and situations.
- Emphasize the seriousness of the situation.
- Focus on the job, not the individual. Avoid making judgments.
- Keep the discussion focused on work performance, regardless of the individual's response.

Schedule timelines for improvement and a follow-up meeting:

- You and the staff member should jointly agree on an action plan based on their input and your guidance.
- Establish a timeline for improvement, appropriate to the level of the problem.
- Determine and agree on desired results.
- Set a time, date and place for the next meeting.

Describe consequences:*

The staff member needs to know that their performance problem is a serious situation and what they can expect if work expectations are not met. At this point, you should:

- Be specific without threatening.
- Be prepared to follow through if performance does not improve.
- Emphasize that the staff member is responsible for resolving the present situation and avoiding future consequences.

**Be sure to consult with your human resources department prior to communicating consequences to ensure that any job action is consistent with internal policy and procedures.*

3. Recommend your program

- Reiterate your confidence with the staff member and reinforce that your goal is to help them become productive again.
- Remind the staff member that you do not need to know of personal problems but you can encourage the use of your program and explain how it can help.
- Provide information about your program, emphasizing that it is a confidential resource available free of charge to address any personal problems the staff member may be having.
- Explain to the staff member that no personal or private information will be provided to anyone without the individual's written consent.

Note: You may wish to call your Workplace Support consultant to discuss confidentiality issues and Authorization to Disclose procedures.

4. Ongoing communication and engagement

Following up after the constructive confrontation meeting is just as important as preparation before the meeting. Some good guidelines for follow-up are:

- Keep all aspects of the situation between you and the staff member private.
- Do not “walk on eggshells.” It is counterproductive to be overly sensitive or empathetic.
- Continue to watch the staff member’s work performance and document improvement or decline (performance documentation example is below).
- Make yourself available to the staff member to provide guidance or discuss concerns the staff member may have.
- Support and reinforce positive behavior changes.
- Follow through with normal disciplinary procedures, if necessary.

In addition, a Workplace Support consultant is always available to answer any questions you may have about work expectations following a constructive confrontation, and to provide consultation on any added concerns you may have about the situation. We also recommend that you stay in contact with your human resources department about appropriate job action.

Stay focused on performance

Even with thorough preparation, there is no way to predict how a staff member will react to a constructive confrontation meeting. Many times, the staff member will appreciate your support and welcome the opportunity to resolve problems and improve performance. In other cases, the staff member may become defensive and emotional. Workplace Support services can help you generate a plan to have a constructive confrontation with a staff member about work performance.

Performance documentation example

<i>Day</i>	<i>Date</i>	<i>Time</i>	<i>Change in Performance</i>
Monday	4/04/yr.	9:30 A.M.	Absent. Said it was due to “recurring and very painful stomach problem.”
Wednesday	4/06/yr.	9:30 A.M.	Tardy. 30 minutes.
Friday	4/08/yr.	9:30 A.M.	Absent. Said it was “recurring stomach problem.”
Tuesday	4/12/yr.	9:45 A.M.	Tardy. 45 minutes.
Wednesday	4/13/yr.	9:15 A.M.	Absent. Had to go to court.
Monday	4/18/yr.	9:05 A.M.	Absent. Dentist appointment.
Thursday	4/21/yr.	9:30 A.M.	Tardy. 30 minutes.
Friday	4/22/yr.	9:40 A.M.	Tardy. 40 minutes.
Monday	4/25/yr.	11:00 A.M.	Missed deadline for important project to be completed at time of department meeting.
Tuesday	4/26/yr.	3:00 P.M.	Complaint from sales representative about John’s rude phone manner.
Monday	5/02/yr.	11:30 A.M.	Absent. Unexplained.

Initiating a management referral

As a manager, your role is to be concerned with job behavior and performance, remain alert to changes in normal work pattern/behavior/productivity and take action when the welfare of your staff or organization is at risk. When you need added support or guidance, reach out to your program and speak confidentially with a Workplace Support consultant. Consultants are available at any time, day or night, and can provide guidance on how to approach team dynamics or individual concerns. For additional support, consider a management referral.

There are four types of management referrals available: self-referral/informal referral, formal management referral, specialized management referrals (DOT and DOE/NRC) and mandatory referral.

Self-referral/informal referral

This type of referral allows supervisors to address staff member performance issues that do not warrant formal disciplinary action.

The supervisor can recommend program participation to a staff member who requests help or when the supervisor sees a staff member who seems to be experiencing emotional difficulties in the workplace. Typically, these referrals are due to a concern about the staff member's wellbeing in reaction to personal, acute or traumatic circumstances in their life.

The staff member's participation in the program is voluntary. Through this referral, the Workplace Support consultant's role includes:

- Helping the staff member with finding the right program coordinator to schedule a face-to-face evaluation and potential on-going sessions to deal with any personal issues that may be impacting the workplace.
- Feedback will not be provided to the company contact about the staff member's outreach or use of the program.

Formal management referral

This type of referral allows supervisors to address staff member attendance issues where a pattern of behavior has been demonstrated by a staff member and there is a noticeable decline in work performance. A formal management referral can also be made for reasons such as concerns for staff wellbeing based on behavior changes in the workplace that may not directly impact performance.

A supervisor can recommend the staff member to seek help through the program and request the staff member follow through with this recommendation. Through this referral, the workplace consultant will help with:

- Obtaining a signed Authorization to Use or Disclose Protected Health Information form from the staff member. This form allows the workplace consultant to follow-up and provides one-time reporting regarding the staff member's attendance at an appointment.
- Referring the staff member to a local counselor for an assessment.

Specialized management referrals (DOT and DOE/NRC)

Workplace Support consultants have extensive experience with management referrals of staff members subject to Department of Transportation (DOT) and Department of Energy (DOE)/Nuclear Regulatory Commission (NRC) drug-free workplace and other workplace safety regulations. Ongoing training in these areas is needed for all Workplace Support consultants assuring that appropriate procedures for regulated referrals are followed and that their knowledge and understanding of employer needs is up to date.

Mandatory referral

This type of referral addresses an employer's need for a highly structured program, with ongoing feedback regarding a staff member's attendance and compliance with treatment recommendations.

Performance issues that fall under this category of referral can include:

- Workplace violence
- Substance misuse (either self-reported or through a positive drug test)
- Repeated policy violations (e.g., absenteeism)
- Changes in staff behavior and interactions with others in the workplace that may also be impacting performance

When a mandatory referral is made, the staff member's participation is required by the company. If a staff member signs a release, feedback will be provided to the company based on the individual's participation and progress with the developed care plan. An individual referred to their program on a mandated basis may be suspended from their job for a portion or the duration of their participation in the program or until program attendance can be confirmed. All disciplinary action is determined by the company and not by Magellan or any counselor contracting with or employed by Magellan.

The role of Magellan's Workplace Support Services in relation to a mandatory referral may include:

- Offering suggestions for how to comply with employee/employer confidentiality issues.
- Discussing procedures for obtaining an employee-signed Authorization to Disclose form which allows the Workplace Support consultant to report attendance and compliance back to employer.
- Discussing with the employer a particular policy violation and developing a plan of action for the referral.
- Referring the staff member to counseling through your program for assessment.

Contact your Magellan Workplace Support consultant for more information.

Manager referral performance worksheet

If work performance or the behavior of a staff member has deteriorated and all the usual forms of dealing with the staff member has failed to generate any improvement, it may be time to consider using Workplace Support services to find solutions. You can call any time—but the questions below may help you decide when. Be sure to consult with your human resources department prior to communicating consequences to ensure that any job action is consistent with internal policy and procedures. Print this sheet as needed.

Staff member: _____ Date: _____

A. Have you seen repeated and continued patterns of performance deterioration in any of the following areas?
Check the box for affirmative.

- | | | |
|--|---|---|
| 1. Quantity/Quality of Work? <ul style="list-style-type: none"><input type="radio"/> Gradual reduction over a period of time<input type="radio"/> Inconsistent/sporadic<input type="radio"/> Carelessness, increased mistakes | 6. Dependability <ul style="list-style-type: none"><input type="radio"/> Does not meet schedules<input type="radio"/> Makes unreliable/untrue statements | 10. Interpersonal Skills <ul style="list-style-type: none"><input type="radio"/> Deliberately avoids colleagues and supervisor<input type="radio"/> Complainer<input type="radio"/> Unusually sensitive to advice or criticism<input type="radio"/> Overly critical of others |
| 2. Job-related Work Knowledge <ul style="list-style-type: none"><input type="radio"/> Forgetful<input type="radio"/> Reduced awareness of what is going on<input type="radio"/> Unable to keep current | 7. Attendance and Punctuality <ul style="list-style-type: none"><input type="radio"/> Frequent tardiness in the morning<input type="radio"/> Frequent unplanned absences<input type="radio"/> Frequent complaints of vague illness<input type="radio"/> Frequently leaves early or returns late from lunch<input type="radio"/> Frequent unexplained disappearances from job | 11. Safety Conscious <ul style="list-style-type: none"><input type="radio"/> Higher than average on the job accidents<input type="radio"/> Takes needless risks<input type="radio"/> Disregards safety of others |
| 3. Judgment <ul style="list-style-type: none"><input type="radio"/> Inconsistent<input type="radio"/> Frequent errors on routine matters | 8. Analytical Ability <ul style="list-style-type: none"><input type="radio"/> Details often neglected<input type="radio"/> Increased number of poor conclusions/decisions | 12. Other Behavior Problems <ul style="list-style-type: none"><input type="radio"/> Inappropriate personal appearance<input type="radio"/> Loss of interest/enthusiasm for job<input type="radio"/> Extreme mood swings<input type="radio"/> Inappropriate behavior |
| 4. Initiative <ul style="list-style-type: none"><input type="radio"/> Unwillingness to change work responsibilities<input type="radio"/> Needs constant supervision | 9. Ability to Communicate <ul style="list-style-type: none"><input type="radio"/> Argumentative<input type="radio"/> Less communicative than in the past<input type="radio"/> Unclear/imprecise written communications | |
| 5. Resource Utilization <ul style="list-style-type: none"><input type="radio"/> Overly dependent on others<input type="radio"/> Unable to identify proper resources | | |

Regarding the affirmative responses (Items 1 – 12)

- B. Have you documented the performance or behavior deficiencies in behaviorally specific terms? ☐ Yes ☐ No
- C. Have you communicated your concerns regarding the individual's work performance or behavior to the individual? ☐ Yes ☐ No
- D. Has their performance or behavior continued to deteriorate? ☐ Yes ☐ No
- E. Have these items been included in a formal performance review or in formal disciplinary actions? ☐ Yes ☐ No

If the total affirmative responses under section A are excessive in your judgment and the answers to sections B, C, D and E are affirmative, contact Workplace Support.