



Partner Policy: Management Consultation

Introduction

The EAP offers the ManagerAssist Program as a core element of the Employee Assistance service. The program consists of two elements: Management Consultation and Management Referral. This Policy covers the Management Consultation process, a service designed to provide employers with EAP consultative services for those responsible for the management and wellbeing of employees, to either gain clinical expertise and perspective about how to contain or resolve the issues of employees whose work performance is being negatively impacted by personal or professional issues, or to support them in improving their skills as a manager. Participants in the service may be managers at all levels of the organisation or representatives of Human Resources or Occupational Health; for the purposes of this policy, they will be referred to as Manager(s) regardless of their specific role/title in the organisation.

Policy

A Management Consultation is a telephonic consultation with a Manager regarding workplace concerns. The consultation is not provided within a sessional model but ad hoc depending on the needs of the Manager. As a general rule only one consultation will be required per query with perhaps a follow up where appropriate.

Clinicians will be available to provide consultation and guidance for various issues including but not limited to: suicidal intent and ideation, violent or homicidal intent and ideation, interpersonal conflict, chemical dependency, critical incidents, work performance or disciplinary matters, concerns over an employee's presentation of psychological symptoms, family problems or other harmful behaviours. Managers may be looking for assistance in preparing for a meeting with or addressing concerns with an employee or they may be looking for information on how to refer an employee to the service.

Created Date: September 2020
Document Valid as of: June 2021
Revision #: 2
Next Revision Date: June 2022
Document Owner (Dept): Clinical

** Any printed document is considered an uncontrolled document. Please refer to the intranet or your departmental storage location**

Consultations are also available to provide feedback in helping Managers adjust to their role and/or improve in areas of management. This may include (but is not limited to):

- Transitioning to a management role
- Improving communication techniques
- Boundary setting with employees
- Enhancing team motivation techniques
- Setting examples for employees
- Setting expectations for work life balance for team members.

Consultations are collaborative. The Manager will be responsible for following through on any action agreed and may need coaching on how to approach the matter.

Clinicians may need to be more overtly directive and advise a particular course of action where risk factors are identified (e.g., suicide, violence, child protection) and may need to outline to the company official any specific legal requirements, such as mandatory reporting responsibilities, inherent within a professional role. Clinicians may need to give very specific direction in order to preserve the safety of a third party. This needs to be clearly documented in the Case Management System.

The Partner Confidentiality Policy applies to all management consultations.

Clinical Practice

- Whether an organisation is eligible for ManagerAssist is recorded on the Case Management System.
- Clinicians should gather enough basic background information to offer an objective overview of the situation being reported and, additionally to target specific actions that may be appropriate and useful. All consultative suggestions will be based upon EAP clinical best practice policy/procedure and incorporate the specific role of the Manager.
- Where appropriate, and within the benefits available to the organisation, EAP services outside clinical (e.g. Work-life, Legal or Financial Consultation) can be suggested as a potential support.

- The following information should be ascertained and documented during any management consultation:
 - The presenting issue
 - Names of the parties involved (where provided)
 - Content of discussion
 - Review of risk factors
 - Outcome of discussion with plan
 - Follow up details/requirements.

- Following the consultation, the Manager should be offered a follow-up call to review the outcome of any action they take where this is appropriate or encouraged to contact the EAP should they require any further support.

- The EAP will always encourage Managers to consult and follow their specific company policies.

- The EAP cannot advise or comment on the internal policies of specific companies.

- On occasion an EAP clinician will receive a call from a Manager requesting the EAP reach out to an employee whom the Manager believes is at risk of harm to themselves or others. See the Partner Welfare Checks Policy for guidance on when and how the EAP will do this.

- When the employee potentially at risk is, or can be, in the room with the Manager when the latter calls the EAP, the clinician should encourage the Manager to request the employee consent to speak to the clinician directly.

CHANGE HISTORY:

Document Original Author: Alison Brown; Vice President Global Clinical Quality

Stakeholders: Global Infrastructure, Clinical Operations, Quality, Learning & Development, Sales & Account Management.

Change Date:	Approved by:	Subject Matter Expert(S) [SME] Utilized:	Description/Details of Change [Why & What]:
September 2020	Alan King	Alison Brown/ Maulika Sharma/ Maria Guimaraes	Document Initially Created
June 2021	Alan King	Alison Brown/ Maria Guimaraes	Service covers management skills development as well as consultation & guidance on clinical concerns.