Partner Work-Life Policy Document–2021

The purpose of this document is to explain general policies regarding Work-Life as a whole, as well as the specifics on certain benefits or services.

Cluster 1 (Accessing the Service)

WPO Services and Expectations

1. The Work-Life department exists as a part of WPO to help people balance their work and personal lives by helping them find local providers or services that can help with their everyday needs.
2. Consultants are expected to refer to any company alerts and the Nuances section of each Participant Record or Case for specific intake or research procedures dictated by the EAP or Company.
3. Consultants are expected to have professional documentation, using full sentences and proper grammar.
4. Consultants are expected to self-edit all materials prior to sending them to the participant.
5. Consultants are expected to know where training materials are and reference them regularly.

Call Recording & Confidentiality

1. The confidentiality statement needs to be provided to all participants on their initial contact, regardless of medium of access. The limits of confidentiality are always explained.
2. Participant identity must be re-confirmed before any communication with the participant over the phone.
3. Signed consent from a participant is required before any disclosure can be made to anyone requesting information about a participant.

Caller Privacy

1. In compliance with each country's privacy laws, WPO has strict caller privacy policies.
2. Every participant must verify at least two pieces of demographic information (PII – Personally Identifiable Information) and ensure it is logged in UCMS correctly.

3. Consultants must never tell another caller any information about another participant's EAP utilization, demographic information, case statuses, referral information, etc. unless prior consent is clearly documented in that participant's record granting them specific consent.
4. Consultants should not talk about, message, or post any information directly concerning a participant's PII or share anything that hints at someone's identity.
5. Consultants should only include a participant's first name in the subject line or body of an email unless otherwise indicated in the nuances.
6. Consultants are expected to lock their computer's screen when leaving their work-station unattended. Paperwork should be kept face-down or hidden from sight if it contains participant's PII. Any discarded paperwork that contains PII should be shredded, not just thrown into the garbage.
7. Callers over 18 years old need to call in themselves to utilize Work-Life services, or they must be present to provide verbal consent that someone else may speak on their behalf.
8. Exceptions can apply to the age and consent policy if the person over 18 is mentally incapable, mute, incapacitated, incarcerated, or under strict medical supervision.

Customer Experience

1. Consultants should use the appropriate EAP greetings, weather they are answering inbound call or completing an outbound follow up.
2. Consultants are expected to show empathy to all callers, regardless of their situation. Empathy is the ability to understand and acknowledge any kind of feeling.
3. Consultants are responsible for acknowledging how a caller is currently feeling; they are not responsible for counseling, correcting, or agreeing with how the caller is handling their emotions.
4. Consultants should make no assumptions and should approach each interaction with a non-judgmental attitude.
5. Consultants are expected to guide the conversation, using reflection and summary skills, to confirm understanding and move the call forward in a timely fashion.
6. Consultants should set the correct expectations based on the benefits the caller receives, and they should be clear about the projected turnaround time.
7. If a caller is upset, consultants should allow the participant time to speak without interruption, communicate that they understand their frustrations, apologize for how this has affected them, and attempt to find ways to move the participant forward.

Anonymous Participants

1. Without identifying information, participants may only access First Serve services.
2. To access full EAP services they need to provide full name, contact and address details, as well as organization's name.
3. Consultants should never suggest the use of a pseudonym to a participant.

4. Where a participant is openly providing false demographic information, they cannot be offered EAP.

Serving Minors

1. A minor is defined at WPO for all countries as a person under the age of 18.
2. Minors cannot be spoken to over the phone and cannot be referred to EAP services without parental or legal guardian involvement and consent.

WPO No Driving Policy

1. The participant's safety is of utmost concern, and we cannot engage with participants while they are driving.
2. This policy applies to all devices, including Bluetooth and hands-free devices.
3. If a consultant suspects that a caller is driving, they may ask, but a consultant should never challenge a caller over a suspicion; if the caller does not verbally state they are driving, the consultant should process the call as normal.
4. Consultants are expected to empathize with the caller, but they should remain firm and professional about WPO's No Driving Policy.

WPO Verbally Abusive, Sexual, Lewd Caller Policy

1. WPO does not obligate any of our employees to engage any caller who becomes verbally abusive, sexual, or lewd on a call.
2. If a caller becomes exceptionally frustrated or angry and becomes verbally abusive during a call, the consultant should let the caller know they will be unable to assist them if their inappropriate language/behavior continues.
3. Consultants may disconnect the call after providing a warning statement, offering to transfer the caller to a supervisor, and letting the caller know they are disconnecting the call.
4. If a verbally abusive caller calls back repeatedly, the consultant should attempt to follow the steps above again and let their supervisor know immediately.
5. If a caller attempts to sexually harass or say lewd/obscene things, the consultant should let the caller know they will be unable to assist them due to their inappropriate language/behavior, and then they can disconnect the call.
6. If a sexual/lewd caller calls back repeatedly, after identifying that it is the same caller, the consultant should not say anything, mute their phone, and place their headset on their desk. A supervisor should be notified immediately. After two minutes, the call can be disconnected.
7. A General Assistance case should be created to document the call and why we could not continue speaking with the participant.

First Serve

1. Our First Serve Policy ensures that we always offer exceptional service without exceptions, regardless of their situation.
2. Consultants are expected to review the Service Hub or "BC" prior to first serving; First Serve should be the last option when other services are not available.
3. If the consultant cannot find a company, but they do know the EAP, they can create a participant record under the general company record for that EAP (i.e., Company: Anthem Inc., EAP Company: Anthem, Inc.) and serve as normal. Consultants are still expected to make every effort to locate the appropriate company record.
4. If the consultant cannot find the company and does not know the EAP, they can create a participant record under Unknown Company and serve as normal.
5. After confirming a company does not offer the requested service, consultants should check the Service Hub and consider a similar service, or they can first serve the requested service.
6. First Serve cases for Child Care, Daily Living, and Elder Care are served as a normal case through an FCR or confirmed research.
7. Consultants should offer a Daily Living search for attorneys unless the caller is specifically referencing the Legal In Person benefit; Permission from a Team Lead or Coach should be received prior to first serving with Legal In Person.
8. Consultants should first offer a Daily Living search for financial providers before first serving the Financial benefit.
9. Clinical cases can be first served by warm transferring the participant to WPO Clinical.
10. Wellness and Lactation can be first served by warm transferring the caller to Wellness or Lactation.

Cluster 2 (Safety/Risk Assessment)

Mandated Reporting

1. WPO Consultants are considered mandated reporters because of our regular work/contact involving children, disabled persons, and the elderly.
2. A Mandated Reporter is legally required to report any suspicion of abuse or neglect to higher authorities.
3. Consultants should listen for signs of neglect or physical, sexual, emotional, or financial abuse presented by the caller.
4. Consultants should gather and document the caller's contact information, a description of how the abuse was discovered, a description of any action already taken to assist, and information regarding the abuse/neglect.
5. If no action has been taken to assist the situation, the consultant is required to report the information to the local authorities, as well as inform the caller.
6. Consultants are expected to be empathetic and understanding to the caller's emotions, but also firm about the seriousness of their situation.

7. Consultants can encourage the caller to contact these local authorities themselves immediately, or they can offer to do it with them via a Warm Transfer if it makes them feel more comfortable.
8. In Domestic Violence situations, consultants must obtain the victim's consent before contacting authorities, as reporting without consent has the potential to worsen the victim's situation.

Duty to Warn

1. Duty to Warn callers can be identified as persons making verbal threats of suicide and/or suicidal thoughts, or someone that poses an immediate or future threat of harming others.

2. Work-Life consultants are considered non-clinical trained consultants.
3. It is the non-clinical trained consultant's responsibility to act quickly to connect the high-risk caller to a trained clinician for immediate assistance.
4. Consultants should gather the caller's name, company, phone number, and full address.
5. Callers should not be placed on hold; the non-clinical trained consultant's job is to keep the caller talking, but they do not provide counseling.
6. Consultants should first seek assistance from their Team Lead or Team Coach to find an available counselor; if a Team Lead or Team Coach is unavailable, a colleague can assist by instant messaging Clinical Team Leads – Coaches.
7. Once the consultant receives the clinician's direct extension, Warm Transfer the caller to them, and disconnect once they are connected.
8. If the caller discloses a risk of harm to themselves or others while speaking to an affiliate/provider, it is that affiliate/provider's responsibility to connect the participant back to the partner for further emotional assistance and risk management.

Cluster 3 (Core Worklife Services)

General Assistance – Work-life

1. Overview cases are used for documenting calls when the consultant overviews a participant's available WPO services in Service Hub, but they do not wish to use any of them currently.
2. Only one General Assistance Presenting Issue per case should be created.

First Call Resolution (FCR)

1. First Call Resolution (FCR) is when a Work-Life consultant performs immediate research for the participant following the call and provides an un-confirmed list of resources based on the participant's request(s) instead of processing the referral through a research team.

2. Offering an FCR does not restrict a participant from receiving confirmed referrals; FCRs are to be used as a quicker alternative based on the participant's needs.
3. Requests that require confirmed research should not be served through an FCR.
4. FCRs should take 30 minutes or less.
5. Participants asking for an FCR can remain anonymous.

Daily Living

1. Daily Living Work-Life services help connect working individuals to a variety of local providers/services, and/or other educational information within their community.
2. The Daily Living benefit includes participants receiving up to three confirmed, matched referrals per request.
3. Confirmed, matched referrals involve speaking with providers and confirming they meet the participant's needs (services offered, fees, availability, etc.), as well as their contact information (how to best access the service, hours, address, etc.).

Elder Care

1. Elder Care Work-Life services help connect family members and care givers of elderly loved ones, and those facing disabilities, to their local elder care providers/services, and/or other educational information within their community.
2. The Elder Care benefit includes participants receiving up to three confirmed, matched referrals per request.
3. Confirmed, matched referrals involve speaking with providers and confirming they meet the participant's needs (services offered, fees, availability, etc.), as well as their contact information (how to best access the service, hours, address, etc.).

Child Care

1. Child Care Work-Life services help connect parents/guardians to their local childcare providers/services, and/or other educational information within their community.
2. The Child Care benefit includes participants receiving up to three confirmed, matched referrals per request.
3. Confirmed, matched referrals involve speaking with providers and confirming they meet the participant's needs (services offered, fees, availability, etc.), as well as their contact information (how to best access the service, hours, address, etc.).

Cluster 4 (Financial/Legal Products)

Financial

1. The Financial benefit may include consultations to direct and educate participants on general financial topics, according to local accreditation requirements.
2. The Financial Referral benefit includes participants receiving up to three confirmed, matched referrals per request.
3. Confirmed, matched referrals involve speaking with providers and confirming they meet the participant's needs (services offered, fees, availability, etc.), as well as their contact information (how to best access the service, hours, address, etc.).

Legal

1. The Legal benefit may include consultations to direct and educate participants on general financial topics, according to local accreditation requirements.
2. The Legal Referral benefit includes participants receiving up to three confirmed, matched referrals per request.
3. Confirmed, matched referrals involve speaking with providers and confirming they meet the participant's needs (services offered, fees, availability, etc.), as well as their contact information (how to best access the service, hours, address, etc.).

Legal Conflict of Interest

1. A conflict of interest is when an individual or organization becomes involved in multiple interests and becomes unreliable because serving one involves working against another.
2. If a caller is needing support in an area that would be a conflict of interest for the EAP, we can still serve them, but it would be in a neutral capacity.
3. Consultants are expected to refer to any alerts and the Nuances section of each Participant Record or Case to determine additional conflicts of interest dictated by the EAP or Company.

CHANGE HISTORY:

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