

EMPLOYEE ASSISTANCE PROGRAM

LEADERSHIP TRAINING MANUAL



INTRODUCTION

The Employee Assistance Program (EAP) is a trusted resource that has improved and saved the lives of many State of California employees.

This Leadership Training Manual will prepare you to educate employees, managers, supervisors, personnel officers, training staff, organizational leaders, and other key stakeholders.

TRAINING OVERVIEW

Before conducting the training, please review the slides and speaker notes.

- The speaker notes will help you present the information in a conversational manner.
- They will also tell you how to conduct the interactive learning activities.

We encourage you to tailor the presentation to different audiences and highlight specific program features and benefits that resonate with their needs.

Learning objectives:

- Define EAP. What is it and why do people use it?
- Review eligibility criteria and employment categories.
- Learn about each individual EAP service.

PREPARATION - THE KEY TO SUCCESS

Six tips for planning a great training session:

1. Confirm the location, date, and time.
2. Order equipment and services such as a laptop, projector, and/or internet connection. Confirm order a few days before session date.
3. Develop a supply list and gather materials such as copies of training deck, handouts, flip charts, markers, etc.
4. Arrange seating so you can easily see everyone.
5. Make note of the specific points you want to emphasize and personal stories to share.
6. Remember to give everyone a warm welcome so they feel comfortable.

POINTS OF INTEREST BY AUDIENCE

Staff

- Eligibility
- Authorization
- Confidentiality
- Work-life services
- Tele-EAP coaching
- Employee webinars
- Health and well-being tools

Managers and Supervisors

- Management resources
- Workplace support services
- Critical incident stress debriefings
- Types of referrals
- Training and skill development opportunities
- Formal supervisor referrals
- Manager webinars

EAP Stakeholders, Upper Management, Directors

- Benefits to productivity
- Return on investment
- Training
- Organizational development services
- Addressing workplace issues

CONTACT INFORMATION

We hope you enjoy yourself and have fun presenting this valuable information to State of California staff.

If you have any questions about EAP services or materials, please contact:

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EMPLOYEE ASSISTANCE PROGRAM

EMPLOYEE SERVICES



LEARNING OBJECTIVES

- Define EAP. What is it and why do people use it?
- Review the eligibility criteria and employment categories.
- Learn about each individual EAP service.

WHAT IS EAP?

Since 1974, the State of California has provided EAP to support employees and their family members during difficult times, as well as consultation for day-to-day concerns.

EAP is free, confidential, and available 24/7/365. It provides a full range of services including, but not limited to:

- Short-Term Counseling
- Work-Life Services
- Financial Coaching
- Legal Assistance
- Identity Theft Resolution
- Health and Well-being Services

WHY DO PEOPLE USE EAP?

- Stress management
- Relationship difficulties
- Conflict with a supervisor or coworker
- Help to cope with change
- Anger issues
- Alcohol or drug problems
- Sleep disturbance
- Grief and loss
- Depression
- Lack of support
- Anxiety
- Work-life balance concerns

ELIGIBILITY

- Active state employees, their lawful spouse or registered domestic partner, and unmarried dependent children.
- Children (natural, adopted, or step children) under age 26, or any age if incapable of self-sustaining employment due to mental or physical disability.
- Dependent children in the military are not eligible.

EMPLOYMENT CATEGORY BENEFIT LEVEL 1 (JULY 1 - JUNE 30)

- Bargaining Unit 5 and 7 employees.
- Exempt, managerial, supervisory, and confidential employees of the California Highway Patrol.
- Employees, managers, supervisors and confidential employees in Bargaining Units 6, 7, and 8, including seasonal and intermittent firefighters.
- 7 sessions per problem type for employees.
- 7 sessions per problem type for spouse or registered domestic partner.
- 7 sessions per problem type for dependent children, not including the employee and spouse or registered domestic partner.

Problem types:

- Substance abuse
- Alcohol abuse
- Marital and family issues
- Emotional, personal, and stress concerns

EMPLOYMENT CATEGORY BENEFIT LEVEL 2 (JULY 1 - JUNE 30)

- All California Highway Patrol, Department of Forestry and Fire Protection (State Fire Marshall), and Department of Corrections and Rehabilitation employees (unless listed in Level 1).
- 3 sessions per problem type total, shared between employee, spouse or registered domestic partner and children.

Problem types:

- Substance abuse
- Alcohol abuse
- Marital and family issues
- Emotional, personal, and stress concerns

EMPLOYMENT CATEGORY BENEFIT LEVEL 3 (JULY 1 - JUNE 30)

- All other employees.
- 3 sessions total for employee.*
- 3 sessions total for spouse or registered domestic partner, and dependent children.*

*Level 3 sessions are by total, not by problem type.



CONFIDENTIALITY

EAP is provided by Magellan Healthcare.

- Confidentiality is strictly maintained as required by law.
- Legal exceptions:
 - Child or elder abuse
 - Intent to commit homicide or suicide
 - Court order

WORK-LIFE SERVICES

Work-Life Specialists provide information, referrals to qualified resources, and consultation services.

There are a variety of options available to help employees including:

- Child Care
- Career Assistance and Student Resources
- Elder Care
- Financial Services
- Identity Theft Resolution
- Legal Assistance

These services do not count against your clinical sessions.

CHILD CARE

Finding the right child care can be challenging. This service provides guidance and referrals for different types of care including:

- In-home and out-of-home care.
- Care options for non-standard schedules.
- Before and after school care, summer care.
- Research and evaluation of providers.
- Resources to assist with adoption, educational options, and special needs.

Up to 30 minutes per telephonic consultation. These services do not count against your clinical sessions.



CAREER ASSISTANCE AND STUDENT RESOURCES

EAP offers helpful resources and education on a variety of topics for students in different stages of school.

- Member and dependents
- K-12
- College and graduate school
- Continuing education
- After-school programs
- Financial aid—loans, grants, scholarships, etc.

These services do not count against your clinical sessions.

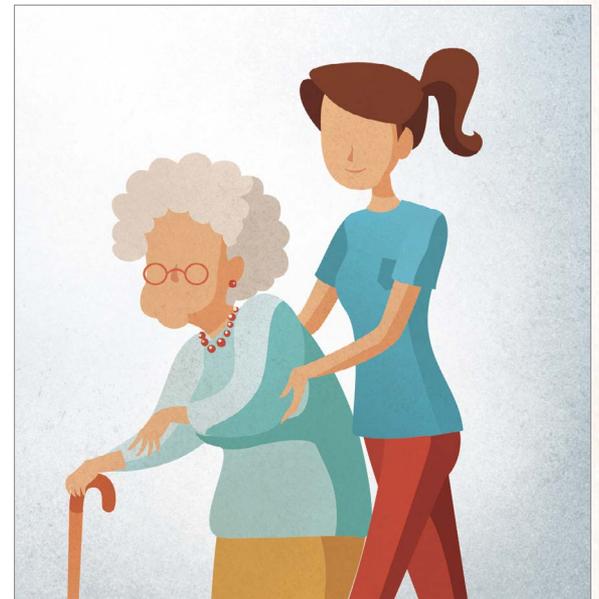


ELDER CARE

Caring for an aging loved one comes with a lot of responsibility. This service provides tremendous support including:

- Evaluating living arrangements, health care, legal rights, and financial concerns.
- Identifying public and private resources for elder care.
- Obtaining referrals to evaluate quality of care in a facility.
- Assessing and monitoring care of loved ones over time as their needs change.

Up to 60 minutes per telephonic consultation. These services do not count against your clinical sessions.

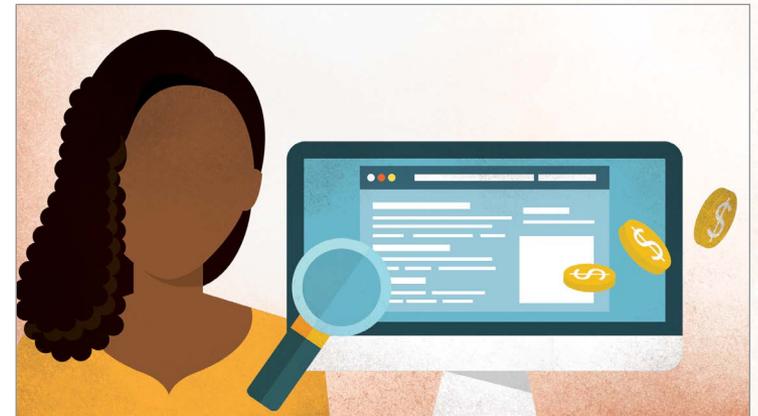


FINANCIAL SERVICES

Financial consulting for a broad range of financial topics including:

- Budgeting
- Debt and credit
- Loan and mortgage assistance
- Taxes and audits
- College funds
- Retirement

Two, free 30-minute telephone consultations per issue, per year. Discounted fees if you elect to continue working with a financial coach beyond initial consultation. These services do not count against your clinical sessions.



IDENTITY THEFT RESOLUTION

This service offers fraud resolution assistance to those who have been victimized by identity thieves.

Consult with a Fraud Resolution Specialist on how to:

- Place fraud alerts, close affected accounts, file police reports.
- Freeze credit to prevent unauthorized account activity.
- Prevent future identity theft.

One, free 60-minute telephone consultation. These services do not count against your clinical sessions.



LEGAL ASSISTANCE

Legal consultation is available for a broad array of legal concerns including:

- Estate planning - wills, trusts
- Family law - divorce, family matters
- Standard legal services - civil and consumer rights, bankruptcy, real estate, criminal matters and more

One, free 60-minute consultation per issue, per year on the phone or in-person. Discounts are available for services beyond 60 minutes. Estate planning and Standard legal services 25% discount, Family law 35% discount. These services do not count against your clinical sessions.



HEALTH AND WELL-BEING SERVICES

EAP is your resource for help with daily challenges and difficult situations.

There are many services to meet your needs including:

- Appointment Assist
- Counseling
- Live Chat
- Online EAP registration
- Tele-EAP coaching
- Telehealth
- Virtual Therapy
- Self-care programs

Reasons to use health and well-being services:

- Struggling with stress and anxiety.
- Finding time and balance in life.
- Feeling down or sad.
- Coping with the loss of a loved one.
- Managing relationship issues.

APPOINTMENT ASSIST

For those times when you need some extra assistance in finding an available appointment.

Call EAP and staff will:

- Take your information.
- Contact providers directly.
- Find the first available appointment for you.



COUNSELING

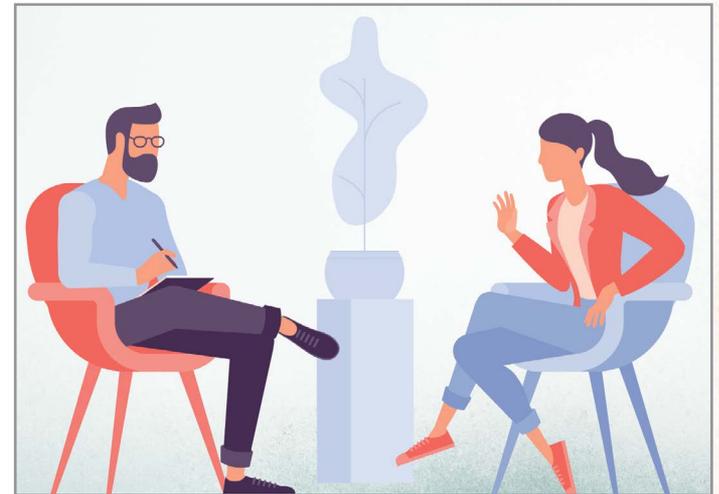
When life presents you with problems that you're having difficulty resolving on your own, take advantage of counseling sessions.

Common reasons people seek therapy:

- To gain a deeper understanding of themselves.
- To work on marriage issues.
- To cope with a big life transition.
- To develop better parenting skills.
- To process grief and/or trauma.

Meet with your counselor in-person, by text, chat, phone or video conference.

This service counts as a face-to-face session.



LIVE CHAT

When you are on the member website and need assistance, help is just a click away with Live Chat.

Live Chat can help with:

- Choosing a provider.
- Locating community resources.
- Dealing with depression.
- Coping with stress or loss.
- Preparing for counseling.



ONLINE REGISTRATION AND PROVIDER SEARCH

When you are looking for a counselor:

- Visit the EAP website, eap.calhr.ca.gov, and use the provider search engine to find care in your area.
- Note which counselors are available to meet in person and those that offer videoconference meetings.
- If you elect to meet by videoconference, make sure your device meets the counselor's system requirements.

Once you find a counselor:

- Fill out the EAP registration form.
- Receive a confirmation.
- Reach out to the counselor directly to schedule an appointment.

All services are confidential.

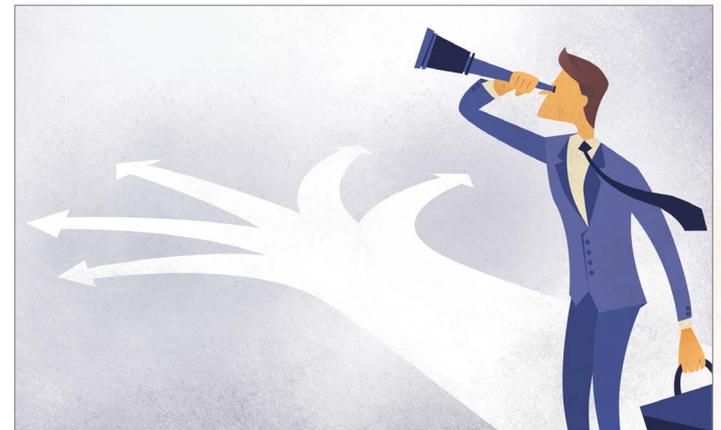
TELE-EAP COACHING

Coaching is available to help employees achieve a specific personal or professional goal.

How it works:

- The employee works with one coach. Together they create an action plan for the employee.
- Meetings are held at regular intervals, by phone or video conference, until the needs have been met.
- The coach assists with problem-solving, follow-up, and accountability.

Call EAP to request a session. These services do not count against your clinical sessions.



TELEHEALTH

- Telehealth gives employees the opportunity to meet with a counselor via video conference (available for participating providers).
- Employees can use their smartphone or computer with a webcam and high-speed internet access.
- Typically this service provides faster and more convenient access to mental health services.

This service counts as a face-to-face clinical session.



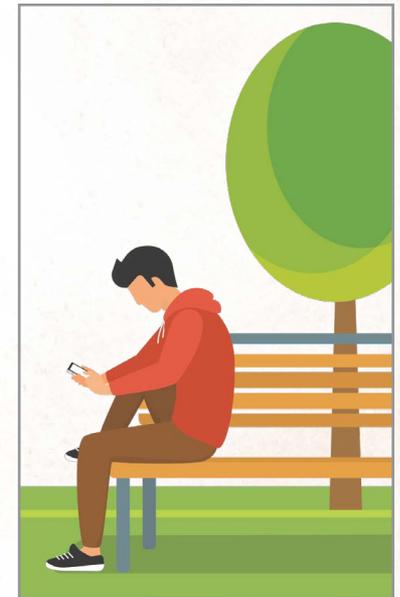
VIRTUAL THERAPY

You can meet with a therapist virtually by text, chat, phone or video conference.

Key features:

- Counseling for the entire family – individual, couples and teen counseling (with parental consent).
- Sessions are highly individualized and last about 30-60 minutes.
- If needed, members can purchase additional sessions beyond the EAP sessions at a discounted rate.

To get started, call EAP or visit the EAP website, eap.calhr.ca.gov and click on the BetterHelp virtual therapy tile.



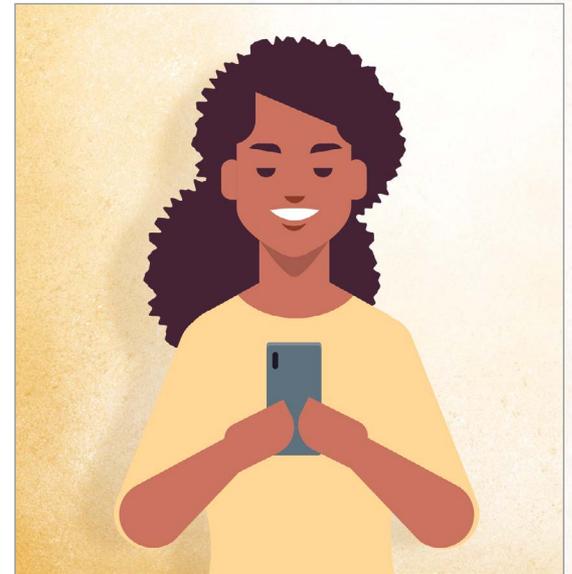
SELF-CARE PROGRAMS

Full-spectrum digital emotional wellness tools can help with common concerns, from managing stress, anxiety and depression to improving sleep and mindfulness.

Access support through personalized and self-directed programs, in-app coaching, uplifting stories, videos, and daily inspiration.

Key features:

- Interactive, self-paced programs matched to your preferences.
- In-the-moment tools for coping with daily situations.
- Thirteen core focus areas.
- 30+ life topics including caregiving, chronic conditions, and LGBTQ+.
- 1600+ activities to help you live your best life.
- Available via web and smartphone/tablet app at no cost to you or your eligible dependents.



EAP WEBSITE

Visit eap.calhr.ca.gov to access programs, services, articles, and timely crisis information.

- Available 24/7/365.
- Watch EAP orientation videos.
- Register for live webinars.
- Search for a counselor.

SITUATION 1 - DEPRESSION AND INSOMNIA

About the individual

Boris is married to Chloe.

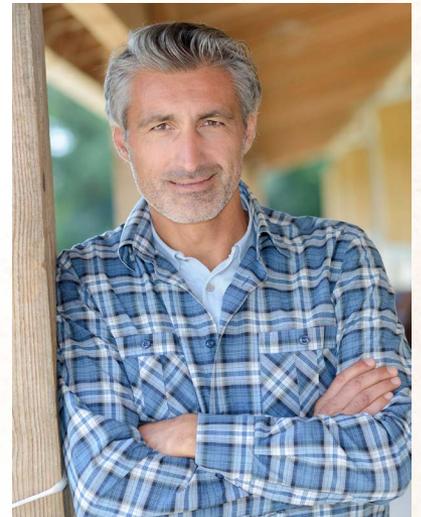
Together, they have a son in college and a daughter in elementary school.

Boris works full-time in a demanding job. He enjoys trail running and playing cards with friends. Since his son has been at college, the family has been spending a lot of weekends making the two-hour drive to visit him.

About the situation

Boris was recently promoted at work; but Chloe was laid off six months ago and has had a difficult time finding a new job. Boris spends a lot of time in the office and he has considered picking up a part-time job to help his family make ends meet. Boris's son recently announced that he's changing his major and will need to stay in school for an additional year to finish his degree.

Boris is feeling down and having trouble sleeping. He is worried about how to maintain their current lifestyle and pay for his son's education. He doesn't have the time or feel motivated to go trail running and it's taking a toll on him physically and emotionally.



SITUATION 2 - CHILD CARE AND LEGAL ASSISTANCE

About the individual

Annie is divorced.

She has full custody of twin boys in kindergarten.

Annie is an individual contributor and has been in her role for one year. She also runs a small online business making and selling crafts. She recently joined the school PTA. She practices yoga when she has downtime.

About the situation

The only family Annie has nearby is her elderly father with dementia and her social circle was negatively impacted by the divorce.

The afterschool care program was cancelled, and she has been struggling to find reliable childcare that doesn't break the bank.

In addition, she realizes that her father should be put into an elder care facility for his health and safety but she doesn't know where to start. She is concerned that he has not made appropriate arrangements for his assets, beneficiaries, etc.



CALL THE EAP

(866) EAP-4SOC (866) 327-4762
eap.calhr.ca.gov
TDD (800) 424-6117*

For questions or assistance contact:

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California Department of Human Resources
(916) 324-9353
jackie.hensley@calhr.ca.gov

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*Translation in over 140 languages.



Employee Assistance Program

EMPLOYEE ASSISTANCE PROGRAM

SUPERVISOR SERVICES



LEARNING OBJECTIVES

- Learn about Workplace Support Services.
- Understand how Critical Incident Stress Debriefing works.
- Review EAP referral types.
- Peruse training and skill development options.
- Visit Manager Support program tile on eap.calhr.ca.gov.

COMMON WORKPLACE ISSUES

- Anger management
- Absenteeism
- Conflict resolution
- Deteriorating job performance
- Substance abuse issues
- Threat of violence
- Sexual harassment
- Traumatic events
- Psychiatric issues

WARNING SIGNS OF A POTENTIAL PROBLEM

- Absenteeism
- Arriving late, leaving early
- Chronic exhaustion and/or drowsiness
- Decline in work performance
- Difficulty working with others
- Excessive amount of personal time on the phone
- Harassment, bullying, outbursts of anger
- Lack of interest or participation
- Moodiness, irritability, and/or over-reactive

WORKPLACE SUPPORT SERVICES

Workplace Support helps managers and supervisors deal with:

- Day-to-day issues
- Employee performance problems
- Workplace violence concerns
- Other employee situations



THE ROLE OF WORKPLACE SUPPORT

Support when you need it

Call EAP and a consultant will help you assess the situation and provide support. Consultants can:

- Help clarify and define the issue(s).
- Provide guidance on how to communicate a performance issue.
- Explain how to offer assistance in a productive and appropriate manner.
- Offer suggestions on how to approach a referral.
- Discuss options for dealing with a difficult situation.
- Develop an action plan and coach leaders.

Consultations are confidential, solution-focused and available anytime.

CRITICAL INCIDENT MANAGEMENT SUPPORT

When the unexpected happens at work, employees look to leadership for guidance and support.

Critical incidents include:

- Death of an employee
- Threat of violence
- Criminal act
- Natural disaster
- Accident
- Suicide

WHAT IS CRITICAL INCIDENT STRESS DEBRIEFING?

On-site critical incident response.

Clinical follow-up.

24/7 access to telephonic consultation.

CRITICAL INCIDENT STRESS DEBRIEFING

When a traumatic event occurs, Critical Incident Stress Debriefing (CISD) can help minimize the long-term effects on employees and the organization.

- A dedicated team is available 24/7/365.
- Counselors help employees process the emotional and physical impacts of a traumatic event.
- They encourage resiliency, teach coping skills, and provide follow-up assessments.
- Simply call EAP for an assessment and coordination of onsite support.

TYPES OF EAP REFERRALS

Self-referral.

Suggested Self-referral.

Formal Supervisor Referral.

WHEN TO MAKE A FORMAL SUPERVISOR REFERRAL

- Performance has deteriorated.
- There is an ongoing pattern of impaired job performance.
- Inadequate response to a supervisor's intervention.
- State or departmental policy.

FORMAL SUPERVISOR REFERRAL PROCESS

- Observe and document performance.
- Discuss with an HR Representative.
- Discuss with Magellan Workplace Support Consultant.
- Prepare formal referral letter.
- Meet with employee:
 - Make referral.
 - Did employee accept?
 - Explain consent to limited release of information.
 - Assessment by counselor.

Formal supervisor referrals are separate from corrective feedback and formal disciplinary actions such as adverse actions. EAP formal supervisor referrals, including contact information, should be done by a separate memo which is not retained in the employee's official personnel file.

TRAINING AND SKILL DEVELOPMENT

Robust training options are available for Employees and Leaders

Options in Learning Guide

Course categories:

- Emotional Well-being
- Working Well
- Home and Family
- Leadership
- Working Well
- Specialty Trainings

Department EAP Coordinator sets up trainings. Allow 25 business days advance notice.

*Additional fee for services may apply.

TRAINING AND SKILL DEVELOPMENT

Delivery Methods

- Live webinars*
- Classroom-based training*
- Online recorded webinars
- Online podcasts

To request a training, contact Workplace Support:

(866) EAP-4SOC

(866) 327-4762

*Additional fee for services may apply.

MANAGER SUPPORT

Visit the Manager Support program tile on eap.calhr.ca.gov.

- See articles, tips, and tools developed just for managers and supervisors.
- View leader-specific webinars.
- Download
 - Options in Learning Guide
 - Supervisor Handbook

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