



CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

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
- Lifestyle 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:

Jackie Hensley, Statewide EAP Manager
California Department of Human Resources
(916) 324-9353
eap@calhr.ca.gov

Stella Antonakis, Magellan Healthcare Senior Account Executive
Magellan Healthcare
(860) 507-1949
santonakis@magellanhealth.com



CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

EMPLOYEE ASSISTANCE PROGRAM

LEADERSHIP TRAINING MANUAL



SPEAKER NOTES FOR TITLE PAGE

Start here to present both the employee services and supervisor service modules.

- Employee Services is intended for all employees. It is approximately 30 minutes long plus questions and answers
- Supervisor Services is intended for managers, supervisors and human resource representatives. It is approximately 90 minutes long plus questions and answers.

Please review all slides before presenting material.

Day of event:

- Hand out EAP employee brochure to all participants.
- Introduce yourself.
- Introduce Magellan: Our EAP is provided by Magellan Health Services of California, Inc. EAP is an innovative program with a variety of clinical services and technologies to help employees and their eligible dependents meet daily challenges and manage difficult situations. This approach helps enhance employee wellness, reduce stress, and increase productivity.

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.

SPEAKER NOTES FOR LEARNING OBJECTIVES

The learning objectives for today's session are to:

- 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 Wellness
- Legal Services
- Identity Theft Resolution
- Health and Well-being Services

SPEAKER NOTES FOR WHAT IS EAP?

EAP is a free, easy to use and confidential service that has been provided to State of California employees since 1974.

It is available 24/7/365 to employees and their eligible dependents.

The program is voluntary, meaning you make the choice to use it, and confidential, meaning nobody knows you are using EAP unless you tell them.

You can access services by calling the program phone number or visiting the EAP website.

You can see here that EAP includes a full range of services, including, but not limited to:

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

The services are staffed by highly trained, licensed professionals including counselors, psychologists, financial coaches, fraud resolution specialists, and attorneys.

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

SPEAKER NOTES FOR WHY DO PEOPLE USE EAP?

Common reasons why people use EAP:

- Trouble managing stress.
- Relationship difficulties.
- Conflict with a supervisor or coworker.
- Feeling overwhelmed by change.
- Anger control issues.
- An alcohol or drug problem within yourself, or others.
- Sleep disturbance.
- Grief and loss.
- Depression.
- Lack of support from family, friends, or coworkers.
- Anything that is affecting your work performance or reducing your motivation to go to work.

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.

SPEAKER NOTES FOR ELIGIBILITY

Who is eligible?

- 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

SPEAKER NOTES FOR LEVEL 1 BENEFITS

EAP has three employment categories and three benefit levels.

You can find this information on the employee brochure.

Employment Category and Benefit Level 1 includes:

Refer to slide.

Plan year is July 1 through June 30.

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

SPEAKER NOTES FOR LEVEL 2 BENEFITS

Employment Category and Benefit Level 2 includes:

Refer to slide.

Plan year is July 1 through June 30.

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.



SPEAKER NOTES FOR LEVEL 3 BENEFITS

Employment Category and Benefit Level 3 includes:

Refer to slide.

Plan year is July 1 through June 30.

For all levels of service, members will not be eligible for EAP if any of the following events occur:

- Employment with the State of California ends;*
- services are used in a fraudulent or deceptive manner; or
- the contract between the State of California and Magellan ends.

*Exceptions:

- Retirees covered by Level 1 services may use EAP for 90 days after the date of retirement as may California Highway Patrol employees who are covered by Level 2. Benefits for Employees in Level 3 services will end the month following their retirement.
- Surviving family members of employees who had Level 1 services and family members of California Highway Patrol employees who had Level 2 services may use EAP services for six months after the death of an employee.
- Eligibility for EAP services for surviving family members of all other employees stop at the end of the month after the month the death occurred.
- Excluded employees and those in Bargaining Units 1, 2, 3, 4, 11, 14, 15, 20, and 21 receive a six-month extension to their EAP services following layoff from state service. The extension is for time only and not an increase in services or sessions. Services for all other employees end on the last day of the month after the month the layoff occurred.

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

SPEAKER NOTES FOR CONFIDENTIALITY

Confidentiality is a hallmark of the program, and is essential to the success of EAP.

When employees access any EAP service, it is completely confidential.

Only aggregate utilization reports that do not identify individuals are shared with the state.

The legal exceptions are the same as those that guide all clinicians:

- If a member expresses intent to commit child or elder abuse; or expresses plausible suicidal or homicidal intent.
- If a court order (subpoena) requires a clinician to reveal otherwise confidential information.

In these cases, a clinician would be required to notify appropriate authorities.

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 Wellness
- Identity Theft Resolution
- Legal Services

These services do not count against your clinical sessions.

SPEAKER NOTES FOR WORK-LIFE SERVICES

EAP is designed to provide a comprehensive array of services to help employees at every life stage.

Work-Life specialists provide employees with service information, referrals to qualified resources, and consultation services.

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

Read slide.

Note these services do not count against clinical counseling 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.*

SPEAKER NOTES FOR CHILD CARE

Finding the right child care can be challenging. This service will do the legwork to help you find resources that provide a practical solution for your situation.

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.

As with all EAP services you can call the program phone number or visit the EAP website to access support and interactive tools.

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.



SPEAKER NOTES FOR CAREER ASSISTANCE AND STUDENT RESOURCES

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

You can call and work with a specialist to meet your specific needs.

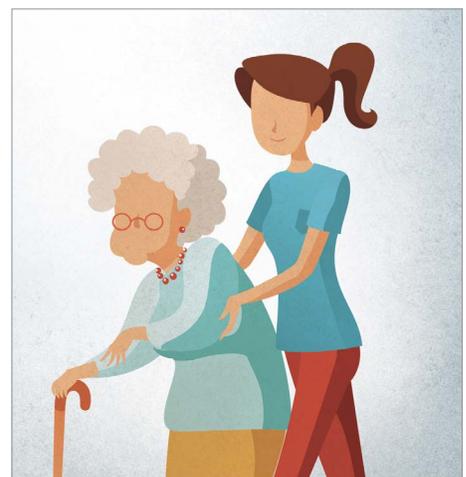
Typical referrals include tutors, school reviews, job placement agencies, financial aid options, resume writing programs, and more.

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.*



SPEAKER NOTES FOR 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.

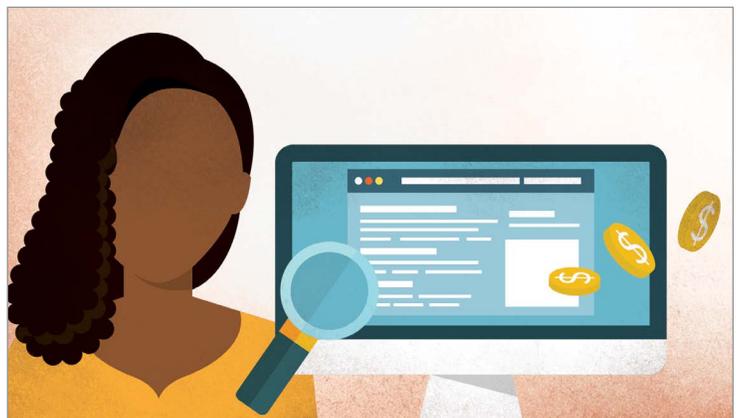
Up to 60 minutes per telephonic consultation. These services do not count against your clinical sessions.

FINANCIAL WELLNESS

Financial consulting for a broad range of financial topics including:

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

Three, 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.



SPEAKER NOTES FOR FINANCIAL WELLNESS

Consultation

You can call Financial Wellness for three, free 30-minute telephone consultations per issue, per year, on issues like financial planning, debt consolidation, budgeting, and retirement planning.

The consultant will listen and assess the situation and then provide education and advice to help you make informed decisions about your unique situation.

During a question and answer session, the consultant may:

- Prioritize steps to take.
- Explain pros and cons of different decisions.
- Discuss debt management programs.
- Provide information regarding the specific situation.
- Refer you to appropriate community services.

Note these services do not count against your clinical sessions.

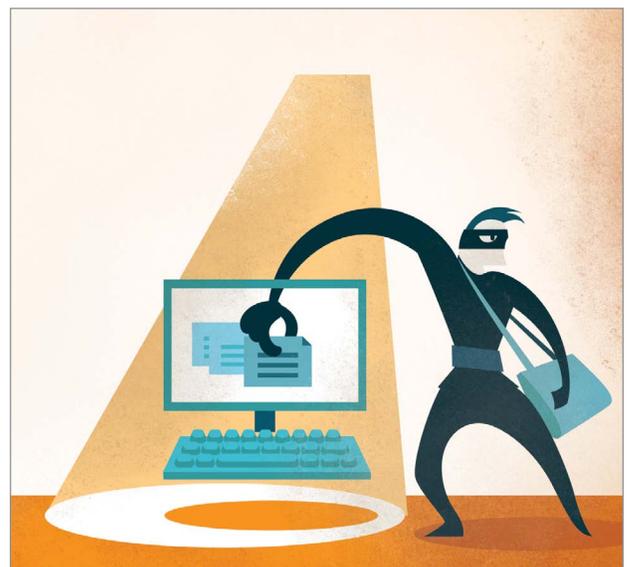
IDENTITY THEFT RESOLUTION

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.



SPEAKER NOTES FOR IDENTITY THEFT RESOLUTION

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

You can 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 SERVICES

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.

SPEAKER NOTES FOR LEGAL SERVICES

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.

It is important to note that this service does not prepare legal documents, provide representation, assist with any formal appeals, or address employment related matters such as sexual harassment, workers compensation, and disciplinary actions.

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
- Lifestyle 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.

SPEAKER NOTES FOR HEALTH AND WELL-BEING SERVICES

EAP is a comprehensive program with a broad array of services to help employees with many needs.

Now I'm going to take you through EAP Health and Well-being Services including:

- Appointment Assist
- Counseling
- Live Chat
- Online EAP Registration
- Lifestyle Coaching
- Telehealth
- Virtual Therapy
- Self-care programs

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.



SPEAKER NOTES FOR APPOINTMENT ASSIST

If you have difficulty finding an available appointment you can call EAP and ask for help.

The staff will:

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

COUNSELING

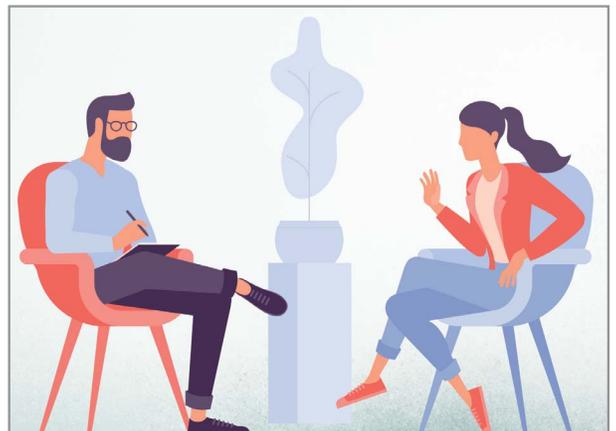
When life presents you with problems that you're having difficulty resolving on your own, take advantage of counseling sessions.

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.



SPEAKER NOTES FOR 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.



SPEAKER NOTES FOR 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.

SPEAKER NOTES FOR ONLINE REGISTRATION AND PROVIDER SEARCH

When an employee looks for a counselor they can use the provider search feature on the member website to find care in their area. The search tool allows you to narrow your search based on criteria such as:

- Type of counseling offered, for example grief/bereavement, marriage/family therapy, mental health, etc.
- If the office is handicap accessible, available on public transit lines, offers videoconference in addition to in-person therapy, etc.
 - Gender of counselor.
 - Languages spoken.
 - Location in distance from a zip code.

Employees can also register on the EAP website to see a counselor. Here's how it works:

- Employee fills out the EAP registration form and receives a confirmation.
- Then the employee can reach out to the counselor directly to schedule an appointment.

And just a reminder - all services are confidential.

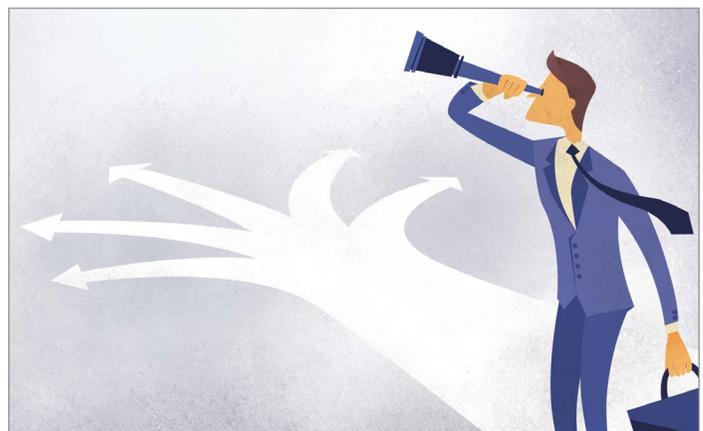
LIFESTYLE COACHING

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.



SPEAKER NOTES FOR LIFESTYLE COACHING

The lifestyle coaching service is available to help employees achieve a specific personal or professional goal such as being more mindful or making a lifestyle change.

To access coaching services simply call EAP and ask for coaching.

- You will be connected to one coach to work with.
- The coach will help you create an action plan using goals that are SMART, meaning Specific, Measurable, Achievable, Realistic, and Timely.
- The coach assists with problem-solving, follow-up, and accountability.
- You will meet with the coach at regular intervals, by phone or video teleconference, until your needs have been met.
- Typical coaching sessions can last 4 - 6 weeks.
- Coaches are available 7:30 am - 3:30 pm Pacific time.

Coaching is not appropriate for high risk situations, chronic mental illness, and alcohol or drug dependence. Also, coaching does 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.



SPEAKER NOTES FOR 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.

You can meet with an EAP provider in the privacy of your own home, car or office for a real time, two-way conversation. Typically this service provides faster and more convenient access to mental health services. Telehealth offers you privacy and flexibility to meet with an EAP provider where and when it is convenient for you.

Members can get started by visiting eap.calhr.ca.gov.

Click the Find Care tab at the top of the page.

You will be taken to the Provider Search page and see Choose a Provider List with a drop down menu. Choose Telehealth EAP. Enter your zip code and distance into required fields. You will be presented with a list of providers in your area.

A Telehealth icon next to a provider's name also indicates they accept Telehealth appointments.

Complete the online EAP referral form and call the provider to schedule an appointment.

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.



SPEAKER NOTES FOR 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.

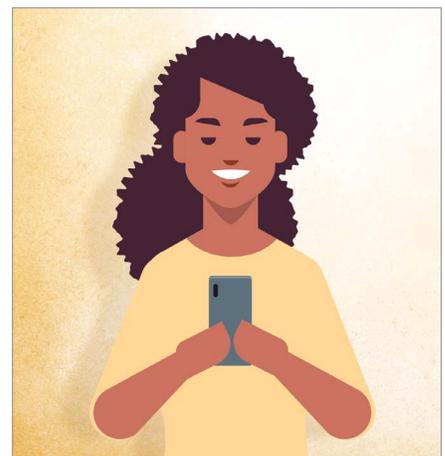
SELF-CARE PROGRAMS

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.



SPEAKER NOTES FOR 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.

These programs can be used on their own or in conjunction with work being done with a counselor.

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.

SPEAKER NOTES FOR EAP WEBSITE

The EAP website provides confidential and easy access to programs, services, articles, and timely crisis information.

Employees can watch an orientation video, search for a counselor, register for a live webinar, research a topic of interest, and learn more about all of the resources available to them.

We encourage you to visit the website on a regular basis and see what's new in EAP.

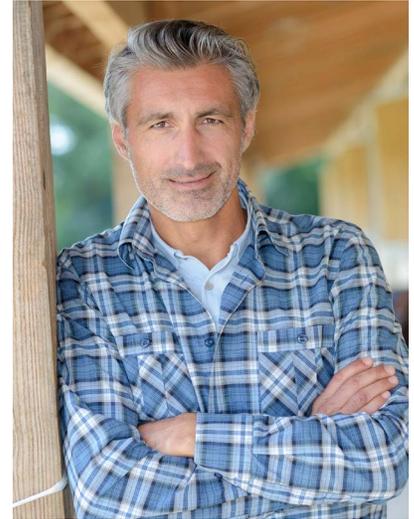
SITUATION 1 – DEPRESSION AND INSOMNIA

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:

Jackie Hensley, Statewide EAP Manager
California Department of Human Resources
(916) 324-9353
eap@calhr.ca.gov

Stella Antonakis, Magellan Healthcare Senior Account
Executive
Magellan Healthcare
(860) 507-1949
santonakis@magellanhealth.com

*Translation in over 140 languages.

SPEAKER NOTES FOR CONTACT PAGE

If you want to contact your EAP you can call the 800 numbers listed here, or go online to eap.calhr.ca.gov. Please note contact information is also in the employee brochure.

Also, for further questions you may reach out to Jackie Hensley, Statewide EAP Manager, or Stella Antonakis, Magellan Healthcare Account Executive.

This is the end of the employee services module. Continue on for supervisor services module.



Employee Assistance Program



CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

EMPLOYEE ASSISTANCE PROGRAM

SUPERVISOR SERVICES



SPEAKER NOTES FOR TITLE PAGE

Now that we have reviewed Employee Services it is time to shift gears and learn about what EAP has to offer for leaders.

Managing people can be rewarding, and at times overwhelming, because events both inside and outside the workplace can impact employee performance. If an employee is hurt, or someone is having problems in a marriage or with family, then that can affect their performance in the workplace, no matter how hard someone is trying to keep it together.

EAP provides specialized Workplace Support consultants to assist managers and supervisors.

Workplace Support consultants help managers assess challenging situations and determine the appropriate level of intervention based on departmental policies.

Managers can call Workplace Support 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 an employee.
- Explaining how to offer assistance in the most productive and appropriate manner.
- Offering suggestions on how to approach a referral and identify important actions to document.
- Discussing options for dealing with a difficult situation.

EAP is a valuable resource that can help with many of the situations that employees struggle with. We encourage leaders to take advantage of this service. Also, please be mindful of the existing State sponsored Wellness Program so that you can help position these EAP resources appropriately.

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

SPEAKER NOTES FOR LEARNING OBJECTIVES

Today we will cover how to use EAP as a management resource.

You will:

- Learn about Workplace Support Services.
- Understand how Critical Incident Stress Debriefing works.
- Review EAP referral types.
- Peruse training and skill development options.
- Visit the 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

SPEAKER NOTES FOR COMMON WORKPLACE ISSUES

This slide lists common workplace issues. We have discussed some of these on other slides, this listing shows you the depth and breadth of services available.

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

SPEAKER NOTES FOR WARNING SIGNS OF A POTENTIAL PROBLEM

This slide lists some warning signs of potential problems. Employees may go through periods of time when they exhibit some of these behaviors. We all have stressors in our lives, at work and at home. It's impossible to prevent all of our personal stressors from affecting our work life and vice versa. However, when these symptoms linger, you may benefit from guidance through a Workplace Support consultation.

WORKPLACE SUPPORT SERVICES

Workplace Support helps managers and supervisors deal with:

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



SPEAKER NOTES FOR WORKPLACE SUPPORT SERVICES

Workplace Support Services are there to help leaders with:

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

Workplace Support Service specialists can help you cope with managerial challenges with your employees including:

- An employee who screams and yells when she is upset.
- Two coworkers who were friends and are not talking to one another due to an argument.
- An employee who may have a mental illness and he is becoming more paranoid and is complaining everyone is out to get him.
- An employee has multiple excuses for being late in the morning and absent after paydays. Manager is concerned the employee may have a substance use issue.
- A departmental reorganization is upsetting employee morale.
- An employee threatens violence to the supervisor. Note: If there actually was violence in the workplace or some other disaster, you might want to call for a CISD.

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.

SPEAKER NOTES FOR THE ROLE OF WORKPLACE SUPPORT

Whether you are dealing with an individual performance issue, your entire workgroup is struggling, or there has been a traumatic event, the Workplace Support Team can assist with their professional, objective viewpoint and specialized knowledge.

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

SPEAKER NOTES FOR 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.

SPEAKER NOTES FOR WHAT IS CRITICAL INCIDENT STRESS DEBRIEFING?

When your workplace is disrupted by a tragic event, employees may feel overwhelmed, anxious, unsettled, and distracted.

Critical Incident Stress Debriefing (CISD) services can help minimize the long-term effects on employees and the organization and are available 24/7.

Managers, supervisors, and HR leaders can call anytime to receive support, consultation and response planning expertise.

Now let's look at these services in more detail to better understand CISD and its crucial role in the workplace.

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.

SPEAKER NOTES FOR CRITICAL INCIDENT STRESS DEBRIEFING

Tragedy has many faces, and each experience is unique. The Critical Incident Stress Debriefing (CISD) team supports employees with immediate and compassionate assistance, any time—day or night.

The goal of CISD is to stabilize the environment, support natural resiliency, and refer those needing additional care to appropriate resources. The services are provided by a dedicated team of clinical professionals who have an average of 17 years experience.

Crisis response training focuses on Psychological First Aid, provided by the Red Cross, the International Critical Incident Stress Foundation, and other major providers of emergency mental health care.

Managers, supervisors, and HR leaders may call the EAP toll-free number anytime there is a need and request to speak with Workplace Support. There is also a phone prompt #5 that will put you in direct touch with CISD services.

TYPES OF EAP REFERRALS

- Self-referral.
- Suggested Self-referral.
- Formal Supervisor Referral.

SPEAKER NOTES FOR TYPES OF EAP REFERRALS

There are three different types of referrals:

Self-referral: Any employee, including managers and supervisors, may self-refer confidentially at any time by calling EAP or going to the member website.

Suggested Self-referral: Managers can play a key role in helping an employee get help for personal concerns. An employee may ask for help, or you may notice behavior changes that concern you about the employee's wellbeing and suggest the employee contact EAP. Typically, there does not have to be a performance problem for you to recommend EAP. You can make the suggestion in a private, supportive manner while supplying the contact information.

Formal Supervisor Referral: One of a manager/supervisor's responsibilities is to monitor employee performance. If an employee's performance or conduct in the workplace is unsatisfactory, a Formal Supervisor Referral may be appropriate. The Formal Supervisor Referral is a management tool used to improve work performance and resolve work-related problems. It is not intended as a disciplinary measure, nor does it replace the state's policies and procedures for dealing with poor performance or conduct. Employee participation in a Formal Supervisor Referral is voluntary.

Formal Supervisor Referrals are separate from corrective feedback and formal disciplinary actions such as adverse actions. EAP referrals, even the informal provision of contact information, should always be done by a separate memorandum which is not retained in the employee's official personnel file.

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.

SPEAKER NOTES FOR WHEN TO MAKE A FORMAL SUPERVISOR REFERRAL

An appropriate time to make a Formal Supervisor Referral would be:

- There is deteriorating job performance.
- There is an ongoing pattern of poor job performance or poor conduct.
- The employee has not responded well to previous attempts by the supervisor to improve job performance or conduct.
- In compliance with any State of California policy that requires referral.

FORMAL SUPERVISOR REFERRAL PROCESS

- Observe and document performance.
- Discuss with a 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.

SPEAKER NOTES FOR FORMAL SUPERVISOR REFERRAL PROCESS

We are going to review the general steps of the Formal Supervisor Referral process. It will be important to work with a Magellan Workplace Support consultant on your specific employee concern to help ensure a successful interaction with your employee.

- Document job performance, conduct issues, attendance, and other issues of concern.
- Discuss your concerns with your departmental human resources office.
- After getting departmental approval, contact EAP and ask to speak to a Workplace Support consultant.
- Prepare a Formal Supervisor Referral letter, on departmental letterhead. There is a sample letter in the Supervisor Handbook.
- Meet with the employee in a confidential setting and discuss the job performance, conduct, or other issues of concern. Outline specific expectations and make the formal referral to EAP.
- Note on the Formal Supervisor Referral Letter whether the employee accepted or declined the referral.
- Continue to document the employee's job performance, conduct, etc. If there isn't progress, follow appropriate disciplinary procedures.

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.

SPEAKER NOTES FOR TRAINING AND SKILL DEVELOPMENT

EAP provides a variety of training options for Employees and Leaders. Note that additional fee for service may apply.

The Options in Learning Guide, available on the EAP website, has a number of trainings in each category listed on this slide.

The Department EAP Coordinator, or other authorized personnel, can set up trainings. Please allow 25 business days advance notice.

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.

SPEAKER NOTES FOR TRAINING AND SKILL DEVELOPMENT

Trainings can be delivered in person, online or accessed individually.

There are over 50 recorded webinars available on the EAP website.

Live trainings can be requested through your Department EAP Coordinator.

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

SPEAKER NOTES FOR MANAGER SUPPORT

The member website includes a Manager Support program tile, accessible from the home page, with articles, tips and tools developed just for managers and supervisors.

You can also access leader-specific webinars and download the Options in Learning Guide and Supervisor Handbook and learn more about Workplace Support Services.

CALL THE EAP

(866) EAP-4SOC (866) 327-4762
eap.calhr.ca.gov

TDD (800) 424-6117*

For questions or assistance contact:

Jackie Hensley, Statewide EAP Manager
California Department of Human Resources
(916) 324-9353
eap@calhr.ca.gov

Stella Antonakis, Magellan Healthcare Senior Account
Executive
Magellan Healthcare
(860) 507-1949
santonakis@magellanhealth.com

*Translation in over 140 languages.

SPEAKER NOTES FOR CONTACT INFORMATION

Closing Notes:

- If time and atmosphere allow, ask them if they have any specific take-away goals.
- Thank the participants for coming and wish them well!



Employee Assistance Program