

Deer Oaks EAP Services

EAP Fact Sheet

8/27/18 item #41



The Deer Oaks Employee Assistance Program (EAP) is a free service provided for you and your dependents by your employer. This program offers a wide variety of counseling, referral, and consultation services, which are all designed to assist you and your family in resolving work/life issues in order to live happier, healthier, more balanced lives. These services are completely confidential and can be easily accessed by calling the toll-free Helpline listed below.

DEER OAKS EAP IS A RESOURCE YOU CAN TRUST.

Eligibility: All employees and their household members/dependents are eligible to access the EAP. Retirees and employees who have recently separated from the employer will continue to have access to services for up to six (6) months post-employment.

Program Access: Members may access the EAP by calling the toll-free Helpline number, downloading the iConnectYou Smartphone App, or instant messaging with a Work/Life Consultant through LiveCONNECT available on our website. Please contact HR for your organization's iConnectYou login information.

Telephonic Assessments & Support: All clinical EAP cases receive a thorough telephonic clinical assessment. In-the-moment telephonic support and crisis intervention are also available 24/7.

Short-term Counseling: Referrals are made to our mental health provider networks in the United States for in-person short-term counseling. Counseling is also available via structured telephonic sessions, video, and SMS text.

Tele-Language Services: Deer Oaks has the ability to provide therapy in a language other than English if requested. Services are available for telephonic interpretation in 200 of the most commonly spoken languages and dialects.

Referrals & Community Resources: Counselors provide referrals to community resources, member health plans, support groups, legal resources, and child/elder care services.

Advantage Legal Assist: Free 30 minute telephonic or in-person consultation with a plan attorney; 25% discount on hourly attorney fees if representation is required; unlimited online access to a wealth of educational legal resources, links, tools and forms; interactive online Simple Will preparation; access to state agencies to obtain birth certificates and other records.

Advantage Financial Assist: Unlimited telephonic consultation with a financial counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction and financial planning; supporting educational materials available; objective, pressure-free advice; unlimited online access to a wealth of educational financial resources, links, tools and forms (i.e. tax guides, financial calculators, etc.).

ID Recovery: Free telephonic consultation with an Accredited Financial Counselor; information on steps that should be taken upon discovery of identity theft; referral to full-service credit recovery agencies; free credit monitoring service.

Work/Life Services: Work/Life Consultants are available to assist members with a wide range of daily living resources such as pet sitters, event planners, home repair, tutors and moving services. Simply call the Helpline for resource and referral information.

Find-Now Child & Elder Care Program: This program assists participants caring for children and/or aging parents with the search for licensed child and elder care facilities in their area. Work/Life Consultants assess each member's needs, provide guidance, resources, and qualified referrals within 3 business days for standard cases and within 6 business hours for urgent cases. Searchable databases and other resources are also available on the Deer Oaks website.

Take the High Road: Deer Oaks reimburses members for their cab, Lyft and Uber fares in the event that they are incapacitated due to impairment by a substance or extreme emotional condition. This service is available once per year per participant, with a maximum reimbursement of \$45.00 (excludes tips).

Online Tools & Resources: Log on to our member website to access an extensive topical library containing health and wellness articles, videos, archived webinars, child and elder care resources and work/life balance resources.



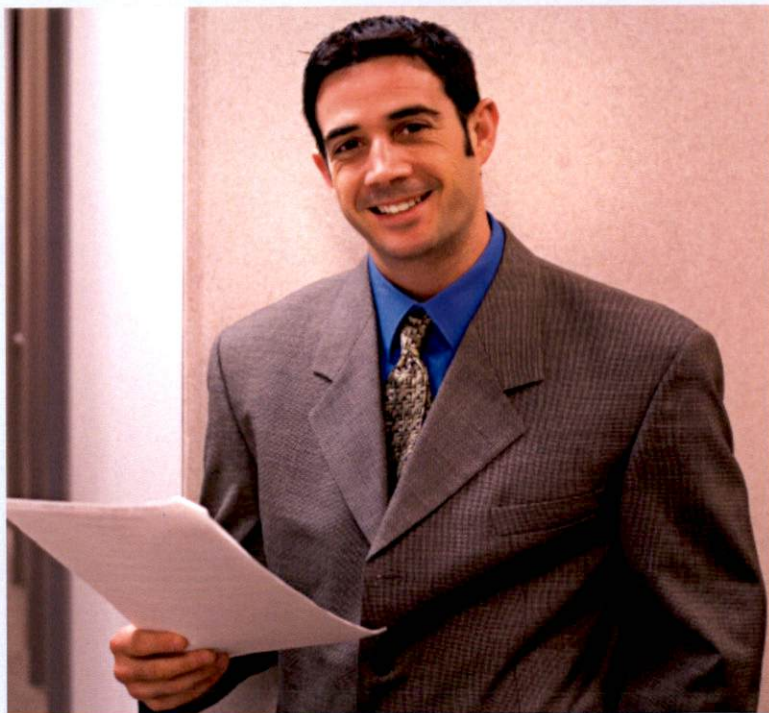
CONTACT US:

Toll-Free: (866) 327-2400
Website: www.deeroakseap.com
Email: eap@deeroaks.com





Advantage Legal Assist



(866) 327-2400 | eap@deeroaks.com

www.deeroakseap.com

Legal Services

- Free half-hour telephonic consultation with a plan attorney qualified to handle your issue
- Free half-hour in-person consultation with a plan attorney per separate issue
- Attorneys are available immediately for telephonic consultation; in-person consultations are scheduled
- Consultation consists of analysis of the situation and advice on how to proceed. There is no document review or creation during this free consultation
- If representation is required, members receive a 25% discount off hourly attorney fees
- Covered Issues: Family Law, Criminal, Bankruptcy, Adoption, Elder Care/Wills/ Trusts/ Estate Planning, Consumer Issues
- Excluded Issues: Employment as it relates to employees and family members, one's own business, class action lawsuits, taxes
- There is no limit to the number of times you can use the service for different issues
- Coverage available in all 50 states
- Telephonic attorneys cannot self-refer, so you are assured unbiased advice
- Unlimited online access to a wealth of educational legal resources, links, tools and forms including 105 legal forms and monthly webinars

Interactive Online Will Preparation (located in the Legal & Financial Center)

- Create a legally binding simple state-specific will at no cost through a step-by-step online "interview process"
- A simple will works well for most people with typical assets such as a house, a car, savings, and investments. But there are some situations in which you may need more than a simple will and should get expert advice or, at the least, investigate your options

Accessing Online Legal Services

- Login to the Deer Oaks website using your company's login and password
- Click on the "Legal & Financial Center" on the right-hand side of the screen to access the Online Will Preparation Service and other articles and tools



Advantage Financial Assist



(866) 327-2400 | eap@deeroaks.com

www.deeroakseap.com

Financial Services

- Free unlimited telephonic consultation with an Accredited Financial Counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction and financial planning
- Counselors address issues via a toll-free information line, and follow up by mailing supporting educational materials; Excluded issues include tax Issues, counseling, advice or comparison of specific financial services or products
- Advisors are available without an appointment Monday through Friday or through pre-scheduled Saturday sessions
- All counselors are knowledgeable in a wide range of financial topics
- Advice is objective and pressure-free
- Unlimited access to a wealth of educational financial resources, links, tools, and forms (i.e. tax guides, financial calculators, etc.)

ID Recovery

- Telephonic consultation service to help you recover from, and minimize the impact of, a breach of your identity
- Provides victims a 30-minute consultation with an Identity Recovery Professional
- The professional will assess the situation, create an action plan, and provide consultation on implementing the plan
- Reduces time spent repairing compromised credit history
- Restores peace-of-mind, while helping undo the damage

Credit Karma: Free Credit Monitoring (located in the Legal & Financial Center)

- Free registration- no service level or payment plan required
- Receive free credit reports and notification of any changes involving your credit

Accessing Online Financial Services

- Login to the Deer Oaks website using your company's login and password
- Click on the "Legal & Financial Center" on the right-hand side of the screen to access the Credit Karma Service and other articles and tools



FEATURES INCLUDE:

- Initial Telephonic Consultation & Assessment by a Work/Life Consultant
- Answers to Questions about Work/Life Topics such as the difference between care options (e.g. day care centers vs. family day care homes) or how to evaluate providers
- Guidance on how to manage work, personal, and everyday issues
- List of referrals to providers in your area within 12 hours of the request
- Support for you, as well as those in your family/household

Enhanced Work/Life Resources

To help you make time for what matters most, you and your family have access to an Enhanced Work/Life Program provided through your EAP. This service offers telephonic assistance from a professional Work/Life Consultant to provide support, guidance and referrals for any work, personal, or everyday issue that's important to you.

Consultants are able to assist with nearly endless resources such as finding pet sitters, child and elder care facilities, tutors, home repair, veterinarians, and moving services. Below are a few of the topics for which we can provide resource and referral services:

Adoption Agencies
Adoptee Support Groups
Before & After School Care
In-Home Care
Nanny Agencies
Special Needs Child Care
International Study Programs
Child Development
Blended Families

Raising Teenagers
Tutors
Kindergarten Programs
Enrichment Programs
School District Profiles
2 and 4 Year Colleges
Continuing Education
Admissions Testing
Cancer Care Centers

Retirement Communities
Alzheimer's Support
Pet-sitters / Kennels
Apartment Locators
Volunteer Opportunities
Diet & Nutrition Programs
Chronic Condition Support Groups
Legal Aid Organizations
Mortgage Brokers

(866) 327-2400

www.deeroakseap.com

eap@deeroaks.com



2018 STRESS MANAGEMENT WEBINAR SERIES

A new quarterly training series designed to provide all employees with the knowledge and skills necessary to cope more effectively with stress so they can live healthier and more productive lives.

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How to Better Manage Stress at Work - The demands of the 21st century workplace create stress for most of us. This practical session will teach individuals to better manage stress by re-framing their perceptions of workplace challenges, developing healthier self-talk, avoiding over-reacting to situations, and reducing self-defeating behaviors.

Monday, January 22nd 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/286385783015660545>

Tuesday, January 23rd 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/8204045980444649473>

Managing the Stress of Time and Competing Priorities - Designed to help individuals recognize how personal organization and use of time contribute to stress levels. In addition, the presentation will offer a practical approach to prioritizing efforts and maintaining focus on the most important activities in our lives to reduce stress and increase our effectiveness.

Monday, April 16th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/5287083413396860161>

Tuesday, April 17th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/6491750134230237697>

Managing the Stress of Relationships - This session will discuss the stress caused by the relationship challenges in our lives, and suggest several strategies for improving the quality of our relationships to reduce both stress and conflict.

Monday, July 16th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/4511505503349911809>

Tuesday, July 17th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/7963733420543365889>

Stress & Its Impact on Your Health – A practical look at the effect stress has on individuals mentally and physically, along with helpful strategies for listening to internal alarm systems and proactively implementing stress management techniques that can improve health, productivity and life satisfaction.

Monday, October 15th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/1445018151017599233>

Tuesday, October 16th 1:00 – 2:00 PM CT

Register: <https://attendee.gotowebinar.com/register/2374397946581333505>

About the Presenter:

Greg Brannan has over 15 years of experience in training and organizational development. He specializes in providing practical training for leaders, managers, and employees at all levels designed to strengthen workplace relationships, improve morale, and maximize employee productivity. Mr. Brannan has conducted trainings for such groups as the National Institutes of Health, the National Association of State Personnel Executives (NASPE), the State & Local Government Benefits Association (SALGBA), and various municipalities, school districts, and private companies.



2018 Supervisor Excellence Webinar Series and Leadership Certificate Program

A series of topics designed to provide supervisors and managers with enhanced skills to improve workplace morale, employee motivation, and staff productivity. Managers/supervisors who attend 5 of the 6 webinars will receive the Deer Oaks 2018 Leadership Certificate.

Preparing to Lead Effectively

This important session is designed to help both new and experienced managers to further develop the key skills and practices necessary for effective leadership. Topics to be discussed will include how to communicate a positive vision to the team, strategies for aligning tasks and projects with organizational goals, and approaches for maintaining employee motivation.

When:

Friday, February 23rd, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/1360785664566409986>

Monday, February 26th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/8953771073429413122>

Relationship Excellence for Managers

This practical presentation will discuss several of the most important interpersonal skills used by supervisors and managers on a daily basis to maintain an engaged and motivated work team. The topics to be covered will include bonding skills, listening skills, coaching skills, and conflict resolution skills.

When:

Friday, April 20th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/7363868463572371970>

Monday, April 23rd, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/5471212028472273154>

How to Motivate Employees from Different Generations

Employees who grew up in different time periods can have different values, different priorities, and different communication styles. This important presentation will explore those differences, and suggest strategies for effectively motivating employees from each generation.

When:

Friday, June 15th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/3622848319786561025>

Monday, June 18th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/7534783148064771585>

How to Effectively Delegate Tasks & Responsibilities

The ability to delegate is a key skill for every leader. This important session will discuss the process of delegating, and how to do it in a way that's motivating to employees and gets good results.

When:

Friday, August 17th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/3279702835385694465>

Monday, August 20th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/2133147503103727873>

How to Become a Better Coach

Becoming less directive and more collaborative is the key to becoming an effective coach. This important presentation will cover the mind set and skills necessary to creating a coaching culture with your team.

When:

Friday, October 19th, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/7967714751990151169>

Monday, October 22nd, 2018, 1 – 2 PM CT

Register: <https://attendee.gotowebinar.com/register/93827211974687489>

Strengthening the Team

This important presentation is designed to provide managers and supervisors with practical strategies for building a strong team environment for their staff. The session will discuss the barriers to creating a positive team environment, the basics of working effectively with different personalities, generations, etc., and several communication approaches that are important for strengthening relationships among team members.

When:

Friday, December 14th, 2018, 1 – 2 PM

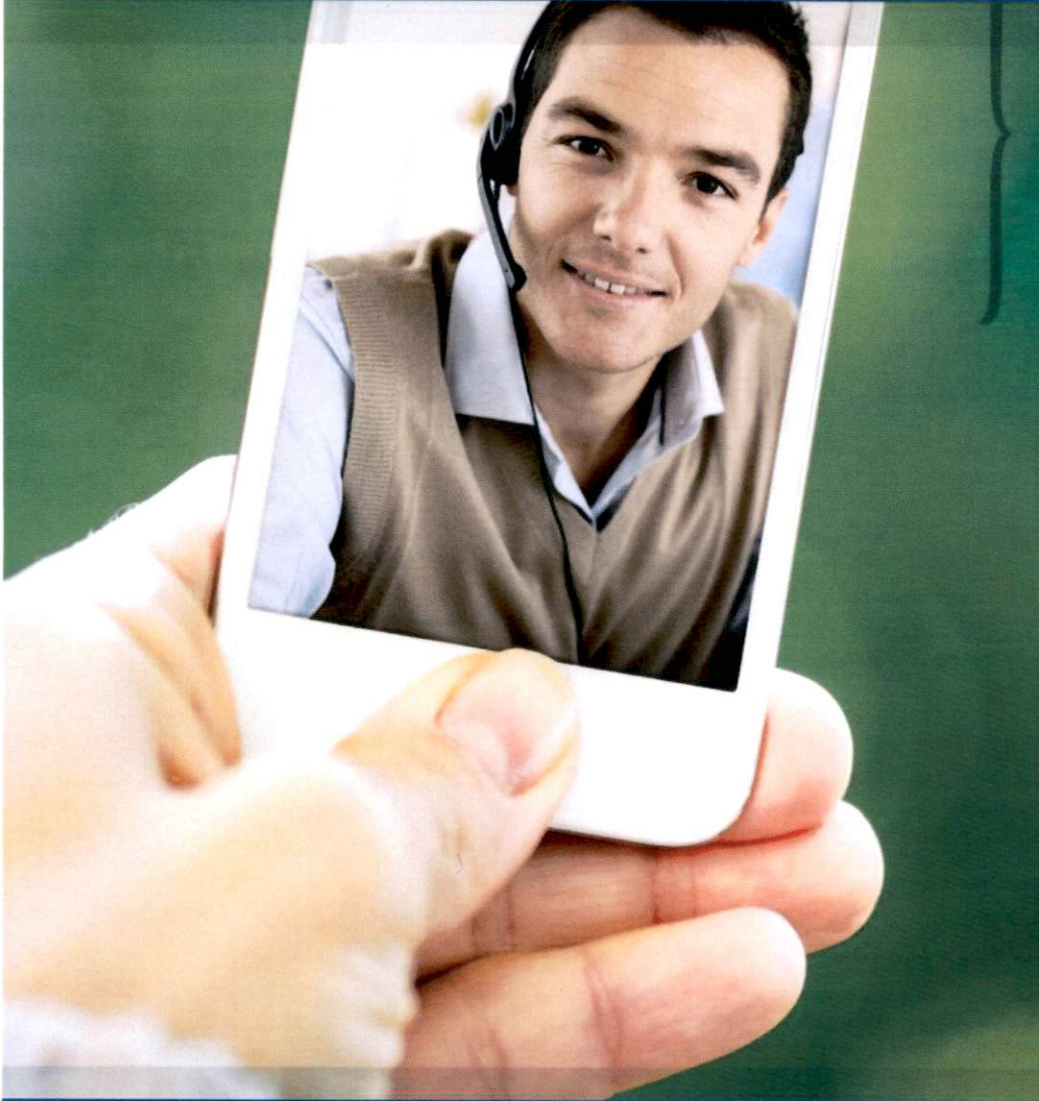
Register: <https://attendee.gotowebinar.com/register/3489978936645597186>

Monday, December 17th, 2018, 1 – 2 PM

Register: <https://attendee.gotowebinar.com/register/7710284995073166594>

Real time support for real issues

ICONNECTYOU: 24-HOUR ACCESS TO YOUR EAP



FEATURES INCLUDE:

- Calls, IMs, and texts are answered 24 hours a day, 365 days a year by caring professionals
- Use your mobile device's video capability to see your counselor, consultant, or coach while you talk
- Use the app to make an appointment at a time convenient for you
- Accessible by iPhone, Android device, or Web browser



iConnectYou is an app that instantly connects you with professionals for emotional support, wellness coaching, and help locating local resources for you and your family.

To access iConnectYou, download the app from the iTunes Store or Google Play, or simply click the Web site listed below to use the Web browser version. To register for iConnectYou, use your e-mail address and the password listed below.

WEBSITE: www.deeroakseap.com

EMAIL: eap@deeroaks.com



DEER OAKS EAP SERVICES



DEER OAKS EAP SERVICES



DEER OAKS

A Behavioral Health Organization

*A More Comprehensive
EAP for a Greater Value...*

Your EAP Services



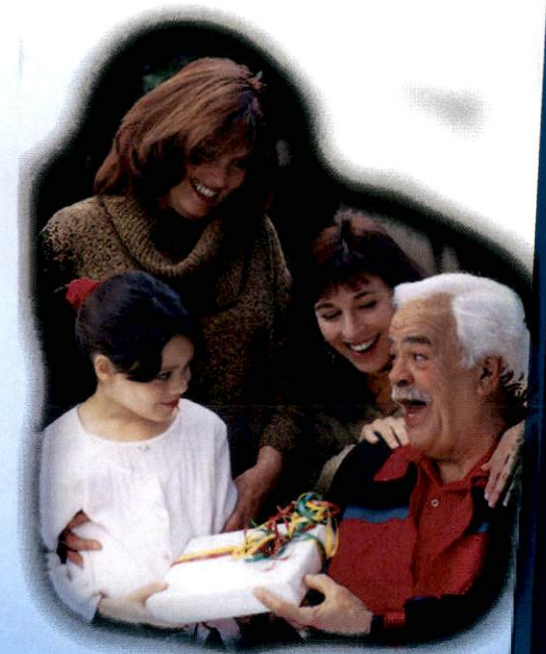
- **Telephone and crisis counseling 24-7, 365**
- **Nationwide service**
- **Face-to-face or telephone based short term counseling - 6 visit model (per issue, per person, per year)**
- **Professional referrals to community resources as needed**
- **National Relay Toll-free phone number for the hearing impaired**



Who is Eligible for Services?



- All dependents at home or away
- Anyone in your household
- Everyone is eligible, up to 6 months after you retire. (voluntary separation or involuntary)
- No need to be enrolled in Medical Plan to be eligible.



DEER OAKS



Employee Assistance Program

Making an Appointment is a Snap



- Call Deer Oaks – 1-866-327-2400
- All calls are answered by our Work Life Specialist
- If accessing the counseling service you will be assigned one of our clinicians who will find the provider for you. The clinician will assure that the provider has open availability.
- Participant will receive appointment information within **2 days** of calling Deer Oaks.
- Deer Oaks will take care of sending the counselor the authorization for services and arrange billing, so you avoid out-of-pocket charges.



Work/Life Services

Childcare Services



- **Child daycare referrals**
- **Parenting and Adoption resources**
- **Babysitters**
- **Sick Child Care**
- **Summer Programs**
- **Day Camps**
- **Residential Camps**
- **Preschool and Nursery Schools**
- **Before and After School Care**
- **Back-up and Odd Hour Care**
- **In Home Care**
- **Religious Camps**
- **Sport Camps**
- **Special Needs Camps**



Work/Life Services

Eldercare Services



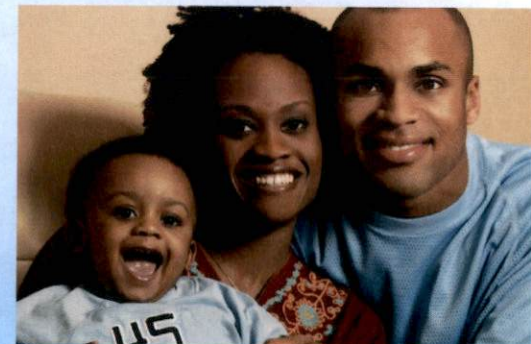
- *Referrals Elder Care/Adult Day Care*
- *Assisted living Facilities*
- *Nursing Homes across the Nation*
- *Independent Living Centers*
- *Cancer Care Centers*
- *Alzheimer's Support*
- *Community Services*
- *Senior Centers*
- *Retirement Communities*
- *Elder Substance Abuse Programs*
- *Adaptive Transportation Services*
- *Volunteer Organizations*
- *Cancer Care Centers*
- *Geriatric Case Management Programs & Services*
- *Mental Health Resources*
- *Medicare & Medicaid Questions*
- *Insurance*

Work/Life Services



Additional Categories	Examples of Referrals
Work & Career Growth	Career Development, Resume Writing Services, Certification Programs
Daily Living & Convenience	Pet-sitters/Kennels, Relocation Services, Transportation/Travel Services, House Cleaners
Health & Wellbeing	Physician Searches, Safety Programs, Support Groups, Fitness Centers/Programs, Nutrition Programs
Parenting	Child Nutrition, Discipline, Toilet Training, Blended Families, Playgroups, Raising Teenagers, Grandparents as Parents
Education	Tutors, Enrichment Programs, Special Needs Education, Home Schooling, Financial Aid, Scholarships

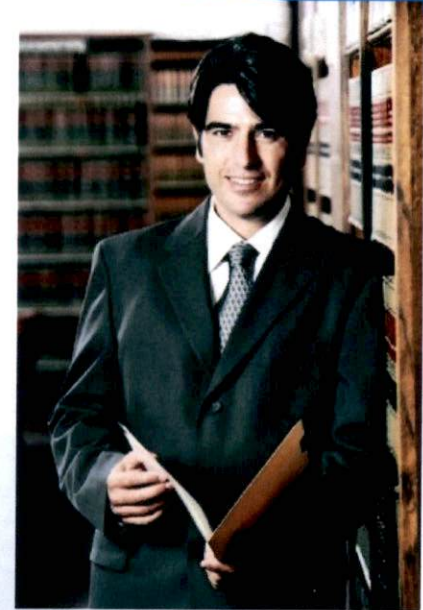
We offer referrals to providers, specialist, and resources to meet specific work, life, or care giving needs.



Legal Services



- Free 30min. consultation with a telephonic or local, in-person attorney.
- Meetings with in-person attorneys are scheduled; meetings with telephonic attorneys are often immediate.
- Consultation consists of an analysis of the situation and advice on how to proceed.
- Employee receives a 25% discount off the attorney's hourly fee.



DEER OAKS



Employee Assistance Program

Legal Services continued...



- Coverage is available in all 50 states
- Telephonic attorneys cannot self-refer, so you are assured unbiased advice
- Access to over 105 legal forms

What is covered?

Covered Issues: Family Law, Criminal, Bankruptcy, Adoption, Elder Care/Wills/ Trusts/Estate Planning, Consumer Issues

Excluded Issues: Employment as it relates to employees and family members, one's own business, class action lawsuits, taxes



DEER OAKS



Employee Assistance Program

Financial Services



- Access to free telephonic financial counseling and education on a variety of issues related to consumer debt and budgeting.
 - Counselors address issues via a toll-free information line, and follow up by mailing supporting educational materials
 - Additionally, advisors are available without an appointment Monday through Friday, or through pre-scheduled Saturday sessions
 - All counselors are knowledgeable in a wide range of financial topics
- **Examples: Budget Preparation, Debt Consolidation, College Planning, Vacation Planning, Retirement Planning**



DEER OAKS



Employee Assistance Program

ID Recovery



- ID Recovery is a telephonic consultation service to help you recover from, and minimize the impact of, a breach of your identity.
 - Provides victims a 30-minute consultation with an identity recovery professional
 - The professional will assess the situation, create an action plan, and provide consultation on implementing the plan
 - Reduces time spent repairing compromised credit history
 - Restores peace-of-mind, while helping undo the damage



DEER OAKS



Employee Assistance Program

Interactive Will Preparation (NOLO)



Now members will be able to create a legal binding simple state specific will at no cost through a step by step on line “interview process”.

It should work well for most people with typical assets such as a house, a car, savings, and investments. But there are some situations in which you may need more than a simple will and should get expert advice or, at the least, investigate your options.



Take the High Road!



Your ride is on us!

**Just pay for your cab keep the receipt,
then call 1-866-327-2400 for
instructions on getting your money
back.**

(One time per year per employee)

Management Assistance Program



- **Disaster Assistance Program**
- **On-site Supervisor Training**
- **Unlimited telephone management consultations (1-877-249-4751)**
- **Individual Training for Employees**
- **Management Referrals**
- **Electronic Newsletters**
- **HR and Department Support**



Critical Incident Stress Debriefings



- **Dealing with the unexpected...**

Deer Oaks Critical Incident Support staff are selected from highly qualified clinicians who are experienced in dealing with a variety of critical Incidents. We can provide both group interventions and one-to-one support in a range of scenarios:

- Major changes can impacts work/family life
- Death or injury in the workplace
- Industrial accidents and environmental disasters



DEER OAKS



Employee Assistance Program



Management Consultations



Are you facing a workplace situation that you are unsure of how to handle? Deer Oaks, your EAP, can help you to better handle some of the more difficult aspects of your job as a manager.

- Managing conflicts between employees
- Dealing with difficult employees
- How to be more assertive
- Communication skills
- Revision of workplace policies
- How to encourage use of the EAP

Call Today for a Free Telephonic Consultation.

1-877-249-4751

www.deeroakseap.com

managerconsult@workplaceoptions.com

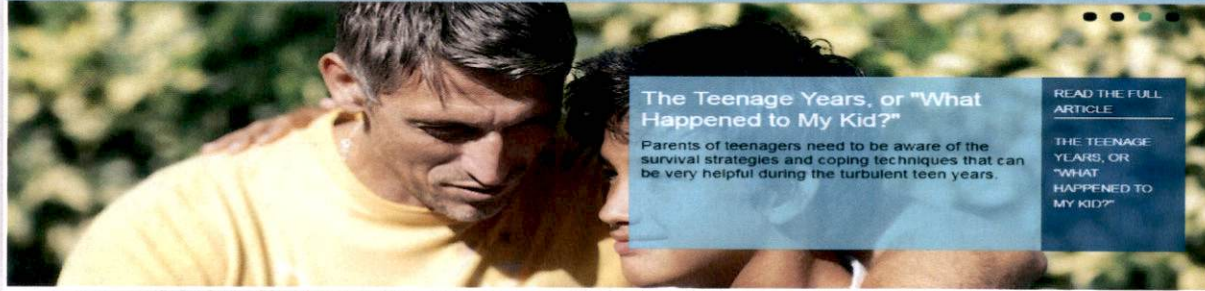


*** Unlimited telephonic supervisory, management, and HR consultation is available to provide guidance regarding issues, policies, practices and events that affect behavior and productivity in the workplace.**

*** Our comprehensive management consultation process offers strategic solutions and practical advice that can open the path for healthy workplace communications and systems**



For 24/7 Assistance, Call (866) 327-2400



The Teenage Years, or "What Happened to My Kid?"

Parents of teenagers need to be aware of the survival strategies and coping techniques that can be very helpful during the turbulent teen years.

READ THE FULL ARTICLE

THE TEENAGE YEARS, OR "WHAT HAPPENED TO MY KID?"



- ⬇ Tattoo removal 15.9%
- ⬇ Vasectomy 15.9%
- ⬇ Cochlear implants 14.7%
- ⬇ Contraceptive implant 13.3%
- ⬇ Cytochrome P450 (CYP450) tests 13.3%
- ⬇ Magnetic resonance elastography 13.3%
- ⬇ Radiation therapy for breast cancer 13.3%
- ⬇ Spermicide 13.3%
- ⬇ Transcranial magnetic stimulation 13.3%
- ⬇ Withdrawal method (coitus interruptus) 10.6%
- ⬇ Withdrawal method (coitus interruptus) 10.6%
- ⬇ Auditory brainstem implant 9.8%
- ⬇ Ear tubes 9.8%
- ⬇ Ear tubes 9.6%

[View All Procedures](#)

eLearning

- ☒ Effective Communication 96.9%
- ☒ The Art of Conflict Resolution 78.3%
- ☒ Say What You Mean the Right Way Healthy Forms of Communication 71%
- ☒ Business Etiquette and Professionalism 60.1%
- ☒ Maximizing Your Day Effective Time Management 26.8%
- ☒ Appreciating Personality Differences 11.7%
- ☒ Self-Care: Remaining Resilient 10.6%
- ☒ Sexual Harassment Prevention in the Workplace 10.6%

EMPLOYEE ASSISTANCE PROGRAM: MANDATORY REFERRALS



General Inquiries:



(866) 327-2400

www.deeroakseap.com



eap@deeroaks.com

For Mandatory Referrals:



(877) 249-4751



managerconsult@workplaceoptions.com



GUIDELINES REGARDING MANDATORY REFERRALS

If you have concerns about an employee's behavior or performance on the job, the Deer Oaks EAP offers several support options for managers:

- 1. Management Consultations:** By calling the toll-free Helpline, all managers and supervisors have access to our Management Consultation Team. This team is available to answer questions about handling troubled employees, team issues (morale, productivity, etc.), and may suggest interventions that would be most effective in the workplace.
- 2. Informal or Suggested Referrals:** If an employee's performance has not met the need for disciplinary action, you may suggest that he/she call the EAP. These referrals remain confidential, but are a good way to offer a free resource to an employee who may be able to turn his/her behavior around quickly. With this type of referral, the employer will not receive reports regarding the employee's attendance or progress.
- 3. Mandatory Referrals:** For employees who are receiving disciplinary action or whose behavior or performance have been consistently and/or significantly below expectations, supervisors or managers may mandate that they attend EAP counseling sessions in accordance with the employer's Human Resources Manual/Policy. Employees will be required to sign a Release of Information Form so that the Employer-designated representative may follow their progress and ensure compliance and attendance.

Examples of reasons to make a mandatory referral include:

- Excessive/unusual absenteeism or tardiness
- Difficulty in making changes; resistance about learning new skills
- Erratic work pattern; inconsistent performance
- Difficulty concentrating; forgetful; confused
- Generally lower level of efficiency or productivity
- Interpersonal problems; increase in conflict
- Wide mood swings; loss of emotional control

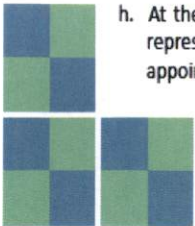




MAKING A MANDATORY REFERRAL

If you decide to mandate the referral, be sure to use the following Mandatory Referral Process:

- a. Alert your HR department or other company representative in accordance with your employer's Human Resources Manual/Policy.
- b. The Employer-designated representative and the employee review and sign the Release of Information Forms.
- c. The Employer-designated representative contacts the EAP to inform them of his/her intent to make a mandatory referral. Please note, mandatory referrals may be submitted via phone at 877-249-4751 or email at managerconsult@workplaceoptions.com.
- d. The EAP clinician takes Employer mandatory referral information and requests a copy of the employee/manager information and Release of Information Forms (or confirms receipt thereof if forms were submitted via email).
(Please note that email confirmations will occur through a secure email system called Barracuda)
- e. The case is then assigned to a Clinical Case Manager.
- f. The Clinical Case Manager reviews the steps of case management with the Employer-designated representative to include the following:
 - The employer may opt to have the Clinical Case Manager make contact with the employee or request that the employee be responsible for calling in him/herself. In the case of the latter, the employee has two (2) business days to call the Clinical Case Manager to complete the initial assessment and receive a confirmed match clinical referral/appointment. If the employee does not call within this time frame, the Employer-designated representative is notified.
 - The Clinical Case Manager contacts the Employer-designated representative via e-mail or phone to inform him/her of the date of the first appointment.
- g. Summary of progress is reported to the Employer-designated representative after the first and final sessions (or at other clinically appropriate periods depending on the number of sessions).
- h. At the end of the case, the Clinical Case Manager will provide the Employer-designated representative with a formal letter of case closure summarizing the dates of the employee's appointments.



Employee Referral Form for EAP Services



Section 1: Organization Details:

Organization Name:		Department:	
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Section 2: Referring Manager(s):

1. Referring Manager Name	Email:	
	Telephone:	
2. Referring Manager Name	Email:	
	Telephone:	

Section 3: Employee Information:

First Name:		Last Name:	
Telephone:		<input type="checkbox"/> Home <input type="checkbox"/> Mobile <input type="checkbox"/> Work	<input type="checkbox"/> Messages are permitted <input type="checkbox"/> Do not leave messages
Date of Birth:		Job Title:	
Email:		Address:	

Section 4: Reason for Referral:

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Section 5: Terms regarding the release of confidential information:

The completion and submission of this form allows Deer Oaks EAP to confirm only to the referring manager(s) listed above whether or not contact has been successfully made with this employee and the agreed course of action established, such as referral to EAP counseling or referral to outside resources. Any additional information, such as appointment dates, confirmation of attendance, treatment goals as related to the reason for referral, or recommendations will only be shared with the express consent of the employee as detailed in Section 6.

Is additional information required? Yes (Please go to section 6) No (Please go to section 7)

Section 6: Employee consent for release of additional information:

I, the above named employee, consent to the following information to be released as it relates to the reason for my referral both during the course of the referral and in a confidential report to the referring manager(s) listed above, at the conclusion of the referral:

- Appointment dates and attendance
- Agreed goals for counseling
- Progress made toward counseling goals
- Recommendations and Referrals

Yes, I agree this information may be released to the referring manager(s) listed above.
 No, I do not wish this additional information to be released.

DOT/SAP Referral: For Department of Transportation/Substance Abuse Professional needed for employees in safety sensitive positions or fall under DOT, please check this section and check "Yes" for section 5 and 6.

Section 7: Agreement to terms of referral (please note that an employee signature is required):

I understand that this authorization may include previous contact and participation with Deer Oaks EAP, as related to the reason for this referral, and will expire automatically one year from the date of the employee signature below or upon receipt of written notification to Deer Oaks EAP.

Employee Signature:		Manager Signature:	
Date:		Date:	

Submit completed forms to ManagerConsult@workplaceoptions.com or via fax: (866) 240-3933. As all referrals contain Personal Identifying Information (PII), email communication between Referring Manager(s) and Manager Referral Specialist(s) will occur through secure email system called Barracuda.

Accessing Services



Call Deer Oaks EAP Services:

1-866-327-2400

E-mail: eap@deeroaks.com

or go to: www.deeroakseap.com

Kristina Herrera-Account Manager

eapams3@deeroaks.com

210-569-8153



DEER OAKS



Employee Assistance Program