

Management referral procedure

Process

- Edison has 3 designated Management Consultants who may be contacted directly at **800-548-6549** and entering their extensions, and/or via their email:
 - ▶ Doug Olsen (SCE Lead) x66721, douglas.olsen@optum.com
 - ▶ Darrell Kerr x66884, darrell.kerr@optum.com
 - ▶ Amy Holle x66919, amy.holle@optum.com
- For routine matters, Edison may also contact the EAP through the standard access number, **800-443-4474 option 2**. If a MC is unavailable, an email containing the manager name, account and contact information is sent to the MC mailbox. Standard call back time is within one hour.
- MC completes initial consultation and gathers referral information from the workplace:
 - ✓ Employee name and date of birth
 - ✓ Employee job title
 - ✓ Length of employment
 - ✓ Details about identified performance issues
 - ✓ History of prior performance issues
 - ✓ Manager expectations of the referral
- The MC sets expectations with the manager
 - ▶ Frequency of adherence updates is negotiated between the manager and the MC.
 - ▶ MC determines manager's preference for verbal and/or written updates using Optum standard template report.
 - ▶ MC emails/faxes Optum Release of Information to the workplace representative
 - ▶ Manager instructs the employee to contact the assigned MC. The MC will:
 - ▶ Review the management referral process
 - ✓ Discuss confidentiality issues
 - ✓ Complete telephonic clinical screening and risk assessment
 - ✓ Arrange urgent/emergent services if indicated
- Initial evaluation is scheduled by the MC
 - ▶ Appointment is scheduled within 24-72 business hours after initial contact with the employee
- The provider calls the MC after the initial evaluation to discuss assessment and shares EAP plan recommendations.
 - ▶ MC will coordinate all recommended services.

- ▶ MC calls the referring manager to report adherence and confirm if there are further EAP recommendations.
- ▶ MC faxes “**Initial Report to the Company**” and if indicated the “**Return to Work Status Report**” to the workplace representative.
- ▶ MC calls the employee to review the plan.
- MC provides ongoing verbal and/or written updates about the employee’s adherence and attendance to the referring manager.
 - ▶ Adherence information consists of confirmation that:
 - ✓ Employee kept initial appointment
 - ✓ EAP recommendations were made
 - ✓ Employee is/is not adhering to the ongoing EAP plan
 - ✓ Employee completed/did not complete EAP recommendations
 - ✓ Note: diagnostic and specific clinical information is not shared with the workplace.
 - ▶ Manager will provide ongoing updates on the MC regarding employee’s performance in the workplace.
 - ▶ MC will maintain ongoing verbal contact with the EAP/treatment provider until the employee completes all recommendations or until the manager instructs the MC to close the case.
 - ▶ MC faxes “**Management Referral Status Report**” to the workplace representative after each update with the treating provider.
 - ▶ MC will notify the manager if the employee is not adhering to the recommendations.
- After treatment is completed, the MC faxes “**Management Referral Closing Report**” to the workplace representative.
- MC closes case after final consultation with the manager.



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