

**Expanding Sources of Support in the Workplace:
Introducing EAPs to Community Mental Health Care Providers of
Vocational Services**

GOAL:

The goal of this training is to help community mental health care providers of vocational services understand the potential role of Employee Assistance Programs (EAPs) in job maintenance for consumers and to provide the skills and knowledge needed to partner with EAP professionals to best support consumers as workers.

LEARNING OBJECTIVES:

- § Understand the role of EAPs in the workplace

- § Identify EAP activities that might help people with mental health conditions sustain work

- § Develop strategies to partner with EAP professionals to help consumers sustain work

- § Gain the ability to educate consumers about accessing EAP services

Target Audience: This training is targeted to providers of vocational services for people with mental health conditions.

Facilitator: The training should be facilitated by a provider staff member who is familiar with both the world of work (including how to communicate in the language of the workplace, EAPs and organizational structure) *and* workplace intervention strategies (including issues of disclosure and negotiation of ADA accommodations) to help people with mental health conditions gain and retain integrated competitive employment.

This is an interactive training! Throughout the training, ask if there are any questions or if anyone wants to make a comment. Facilitator should encourage participation and involvement by asking for questions or comments every few minutes. Keep the question/comment period brief, 2-3 minutes, then continue.

To augment the training, invite someone that you know from an EAP to come and comment during the training and to answer participants' questions at the end of the session.

Training Group Size: The group should not exceed 12-15 participants.

Needed materials: Copies of training handouts for all participants and a dry erase board or flip chart. There are 6 handouts.

Estimated Time: 2 hours with allowance for a 10-15 minute break.

Leader notes: Your directions are in bold type. The material to share with training participants is in regular type and italics.

Introduction (10 minutes)

Welcome participants. Introduce yourself and indicate your connection (expertise) with today=s content.

Introduce purpose of the session.

§ Welcome. Today we are going to talk about the potential role of Employee Assistance Programs (EAPs) and their Union counterparts, Member Assistance Programs (MAPs), in supporting people with mental health conditions at work. Throughout, when we talk about EAPs, you should be thinking about MAPs as well. We will talk about:

§ what EAPs are,

§ how EAPs can augment and reinforce the work you and the consumer are doing together to insure support at the workplace,

§ how to enlist the help of EAP professionals at a specific worksite, and

§ how to educate consumers about working with the EAP.

§ Before we get started let=s make sure we all know one another.

§ Leader: Have participants introduce themselves, the organization they represent, their role and what they hope to gain from the session.

What is an EAP? (10 minutes)

§ We know that you have extensive experience helping people with mental health conditions to work. We also know that often *work retention* is very difficult.

§ How many of you have had the experience where, after a short time on the job, the consumer quits or gets fired?

§ Leader: Allow discussion and ask what was the problem. Try to make a connection between the identified problems and what EAPs can do.

§ We have learned that one of the most important factors contributing to work retention is social support from the workplace. Typically, social support is thought of as the support of supervisors and co-workers. There is no denying that these sources of support are essential. But there are other sources of support at the workplace that are overlooked and can be very helpful to a working consumer. One of these is the Employee Assistance Program, the EAP, or in union settings, the Membership Assistance Program or Personal Services Unit referred to as the MAP.

§ Have any of you worked with an EAP?

§ Leader: Elicit a discussion of group=s experiences with EAPs, including the group=s personal experiences as well as those that resulted from helping a consumer. Ask:

§ Where was the EAP located - at the worksite or somewhere else?

§ What services were offered - were they easy to determine?

§ If not too personal or confidential, what issue brought the individual to the EAP?

§ OK, from your examples we can see that EAPs...

§ Leader: Summarize discussion in a very brief statement.

§ More formally, Employee Assistance Programs are a benefit sponsored by management, Unions, or both, to support workers around issues that might interfere with job performance. Employers understand that anyone at the workplace, at any time, can experience problems in their lives that interfere with doing their jobs. They recognize that they need to be responsive to these problems so that a productive workforce can be maintained.

§ EAPs are a response of employers to this understanding.

§ EAPs are designed to be Ahelp without hassles@ in that they are staffed by people who know the workplace, they are easily accessible to employees, and they can provide assistance quickly through direct counseling or referral.

§ In other words, EAPs are the normal way all employees can obtain help for

problems that affect work. Like all other employees, EAPs should be available to those with mental health conditions.

§ Typical EAP activities vary greatly and are listed in Handout 1.

§ Leader: Provide Handout 1, Services Provided by EAPs. Ask:

§ *What is the most frequent service delivered? And the next?*

§ *Can you see what will be useful to your consumers?*

§ Leader (didactic) (5 minutes)

§ There are two models of EAP service delivery:

§ Internal EAPs are part of a particular employing organization. They are more typical of larger employers.

§ External EAPs are service delivery businesses that contract with an employer to provide a set of negotiated services to that employer=s workforce.

§ The model of service delivery does not determine which services will be offered but, to some extent, might affect how someone accesses the EAP and how services will be provided.

§ In relation to initial contact with the EAP, it is more likely that an internal EAP will be located on site or have a location where an employee can physically access an EAP professional. External EAPs are usually accessed by calling up an 800 telephone number and talking to someone on the phone.

§ Internal EAPs are more likely to be able to take advantage of knowing key players in the work organization and the issues unique to that setting thus, when approaching an external EAP it might be more important to provide more background information about the particular employment situation.

Introducing Consumers to EAPs (15 minutes)

§ *How does a consumer find out about what an EAP offers?*

§ Leader: Distribute Handout 2, ACME EAP Brochure and Handout 3,

Brochure Questions.

§ At the time of hire, new employees are usually presented with information about the benefits available. A brochure like Handout 2 is often the way employees are alerted to EAP services. Otherwise they might receive information from the EAP directly in the mail at their home address. They may also hear about the EAP from co-workers or through a suggestion from a supervisor or a person in Human Resources.

§ Leader: Break participants up into small groups of 3-4 participants. Instruct the groups to read the brochure and answer the following questions. Each group should have a scribe to record their group's answers.

§ Who is eligible for EAP services?

§ How does someone access EAP services?

§ Around what kinds of concerns does the EAP provide help?

§ Leader: After five minutes, bring the groups back together and debrief.

§ Are all employees eligible? Dependents?

§ Yes, any employee and his or her immediate family is eligible.

§ Do employees access the EAP by calling directly, on the internet, walking into an office? Are referrals necessary? Are referrals mandated? What do you do in a crisis?

§ For the ACME EAP, employees and their family members can call an 800# to access the EAP during business hours. There is a 24 hour crisis line. Referrals are not necessary. The brochure does not say anything about mandated referrals.

§ Some workplaces, especially ones where the work is safety sensitive, meaning that the jobs involve risk to human life, such as the airline industry or jobs dealing with hazardous materials, may do drug testing that is overseen by the federal government. They may also have regulations that monitor medication intake related to certain job titles. In these jobs, people can be mandated or required to go to the EAP if they have a positive drug test. It is especially important to ask about safety sensitive job requirements if a consumer seeking a job is on medication. If someone is working towards sobriety, safety sensitive work would not be a good fit until that person is stable in his or her condition.

§ Does the EAP respond to concerns with work performance, mental health, substance abuse, marital problems, financial problems, dependent care, others?

§ YES! The EAP responds to many concerns from problems at work to mental health to stress to legal problems. Since these services are offered on a situation by situation basis, you would need to call to find out more.

§ *What might you suggest consumers do to find out if the workplace has an EAP if they are not told whether or not there is an EAP at the time of hire or they are already working and do not know?*

§ A consumer can call the Human Resources Department to ask if EAP services are offered. They might also ask the supervisor, co-workers, or look on the company website.

How EAPs Help People with Mental Health Conditions (10 minutes)

§ EAPs can help people with mental health conditions sustain work. Let's go back to Handout 1.

§ *Which of these activities do you think might be helpful to consumers?*

§ Leader: Discuss activities that might be helpful to consumers even if they are not targeted to consumers directly and explain the connection. Look for answers like those below. Provide the answers if they do not come up in the group discussion.

§ Training supervisors - EAPs sometimes train supervisors around how to work with people with mental health conditions. EAPs can educate supervisors about what a mental health condition is, to lower stigma. They can also help supervisors to understand and interpret the Americans with Disabilities Act (ADA), which guarantees people with mental health conditions formal accommodation as long as they are qualified to perform the essential functions of their jobs.

§ Leader, define the concepts of *accommodation* and *essential functions* if necessary. Accommodation means any change to a person's job that helps him or her do the work despite symptoms or medication side effects, and essential functions means that the person can do the functions that are the core of the job, e.g., if it is a data entry job, the person has to be able to type *most of the time*.

§ Coordinating with supervisors around policies and practices that affect clients - EAPs can coordinate with supervisors around implementing the ADA for example. Once a change (accommodation) is put into place for a worker, follow-up and ongoing support are needed. The EAP can work with the supervisor to

make sure this happens. The EAP can also coordinate around the Family Medical Leave Act which allows workers to take up to 13 weeks of unpaid leave annually if they have a medical condition that requires treatment.

§ Manage cases of disability - The EAP can work with other healthcare providers to help a worker keep his or her job. If someone has to take a leave of absence or needs to be moved to a different job, the EAP can help manage transitions and act as a liaison among different players.

§ Consult in job jeopardy proceedings - The EAP can provide support to the worker when there are issues around job performance. The EAP is made up of trained human service professionals and they can work with HR, supervisors and other providers to help a consumer address problems and keep his or her job.

§ Facilitate return to work in cases of disability leave - The EAP can help a person re-enter the workgroup. Sometimes supervisors and co-workers need education around how to support a co-worker. Additionally, the EAP can do follow-up and provide ongoing support AT THE WORKPLACE.

§ Help strategize - The EAP can serve as a consultant to the provider and consumer in helping them figure out how to manage situations that seem difficult or unclear, e.g., a poor performance evaluation that seems to ignore agreed upon accommodations.

§ The Workplace Center of Columbia University School of Social Work conducted a survey of EAP professionals in New York City. On the handout, notice that we provide you with information resulting from the survey concerning the proportion of EAP professionals who indicated that their EAPs offer these services. These percentages suggest that not all services that might be helpful will necessarily be offered at the EAP at the workplace hiring your consumer. Services are offered on a situation by situation basis.

§ When EAP professionals are asked about specific activities that they offer that help people with mental health conditions, one finds that some are a usual service of EAPs while others are not. Let's look at Handout 4.

§ Leader: Provide Handout 4, Services Provided by EAP that Potentially Help People with Mental Health Conditions.

§ The handout demonstrates that most EAPs (65%) who responded to the survey conducted by The Workplace Center of Columbia University School of Social Work coordinate with community mental health care providers to enhance EAP services.

§ The consumer, or you on the consumer's behalf, have to ask which services are

available.

§ This is where your skills in advocacy and your work to help consumers be informed will have a big impact.

§ In other words, Employee Assistance Professionals are ready to work with you!

§ There will be two ways you might find that you will be working with an EAP.

§ Sometimes you will be contacting an EAP on behalf of a specific consumer to inquire about services in response to that consumer=s particular needs. In this instance you will most likely be calling the EAP phone number and talking with whomever answers the phone.

§ In other instances, you might want to establish a relationship with an EAP as part of building a network of employers responsive to hiring people with mental health conditions. Currently, there might not be consumers employed at the workplace or consumers in need of assistance, but it is a workplace where you anticipate future placements or possible need for support for consumers who have been placed. The purpose of the contact is to educate the employer about the needs of working consumers and to gain a better understanding of the resources and support available through the employer. In this instance, you would be calling the EAP number and asking for the Director at an internal EAP and the Account Manager at an external EAP. The Account Manager is the liaison between the EAP and each employer.

LEADER NOTE: This is a good place to take a short break if needed.

Example of How EAPs Help People with Mental Health Conditions (20 minutes)

§ Let=s go through some examples and explore how this coordination among community providers, EAPs and consumers can happen. First we=ll look at the Sam Situational Example.

§ Leader Distribute Handout 5, Examples and read Sam=s Situation out loud.

You work with Sam who, after 4 months in your vocational services program, secures a job as telephone operator. His first few months on the job go smoothly. He learns the job quickly and he is valued for being bi-lingual. Then, suddenly,

Sam misses his usual appointment with you. You call to find out why and he begins to tell you about how he believes that the KGB is plotting against him. He also says that he has tried to explain this danger to his supervisor and co-workers but they are not convinced and seem to be avoiding him and talking about him behind his back. You secure a promise from Sam that he will come in and see you immediately.

Sam comes in the next day and you learn from your conversation that he has stopped taking his medication. He has had trouble making his appointments to see his psychiatrist because they conflict with work and he has run out of medication. You also learn that his supervisor has warned him that in order to keep his job, he has to go meet with the EAP counselor.

§ Leader: Distribute Handout 6, Plan to Work with the EAP.

§ This form is a tool that can be used to guide a conversation, helping consumers to plan a meeting with the EAP. Let's use this handout to think through how you might plan such a meeting with Sam..

§Step 1: *What is to be accomplished by contacting the EAP?*

§ Leader: Brainstorm with group about ways to work with EAP to help worker maintain his job. Try to elicit the following responses. Offer any that do not come up from the group:

§ EAP counselor can help identify the workplace circumstances that contributed to his condition.

§ EAP counselor can help identify accommodations that might help (e.g., monitoring medication compliance or getting time off to see the psychiatrist).

§ EAP can help educate the work group to help mend relationships.

§ EAP can help coordinate with other workplace units that might need to be involved in the accommodation process.

§Step 2: *Determine what information will be shared. What if Sam discloses his mental health condition to the EAP counselor but does not want his supervisor or work group to know. Is his disclosure confidential?*

§ Is a disclosure required? Has Sam disclosed already? If not, what information will be shared with the EAP?

§ In order to get the accommodation, and support his needs, Sam will need to disclose. He has not already disclosed. He needs to share information about the way his symptoms interfere with his ability to do his job. He can make a disclosure plan that includes:

§ With whom to disclose, i.e., supervisor, co-workers, Human Resources

§ What information to share, suggestions for accommodations

§ How the disclosure is to take place, i.e., will the provider participate?

§ When the disclosure will take place

§ If he has not previously disclosed to the EAP, Sam will need to decide whether to give the EAP his informed consent to use this information on his behalf at the workplace.

§ Leader: Discuss the requirements of confidentiality by the EAP.

§ Sam=s EAP file will be kept separately from his personnel file and his disclosure is confidential.

§ If the supervisor refers Sam, is the EAP obligated to disclose to the supervisor?

§ That depends on Sam. If he chooses not to disclose, the EAP need only provide a Ayes@ or Ano@ response as to whether Sam has come to the EAP.

§ The only information that a supervisor needs to know is information relevant to Sam=s job performance. So, if Sam asks for an accommodation under the ADA so he can perform the essential functions of his job, he would need to tell the supervisor that he has an ADA covered disability so the supervisor can put in place whatever supports are needed and negotiated. The employer, however, has the right to send Sam to an MD to clarify that he has a medical condition that requires accommodation to do the requirements of the job.

§Step 3: Use the specific job description to translate concerns into the language of the workplace.

§ In what ways does Sam=s mental health condition interfere with specific job tasks, job routines, relationships at work, and/or the physical environment?

§ Sam has jeopardized relationships at work by his paranoid behavior.

§ It is unclear how his symptoms are affecting work performance, but clearly his supervisor is concerned.

§ *Step 4: Determine what you will ask the EAP representative to do. A decision is needed about how the EAP will help i.e., provide advice, active intervention, etc. What are Sam=s preferences? How does the need for accommodation affect his decision?*

§ There are several ways the EAP can be involved.

§ provide insight - The EAP can offer consultation about the way the employer will respond to a request for accommodation and how to best approach the situation.

§ negotiate for accommodation such as a leave from work or an adjustment in his schedule - Sam needs some time to restabilize on his medication so he can return to work. He also needs to be able to get to his medical appointments on a regular basis.

§ provide education to the workgroup and the supervisor - There may be some education needed with this workgroup to address some of the behavior that they witnessed when Sam was decompensating and to help them identify signs of decompensation in the future.

§ *Step 5: Identify who will make the contact. How can you help the consumer make the connection with the EAP counselor?*

§ There are two ways the consumer might make the connection with the EAP counselor.

§ The consumer might go to the EAP directly.

§ The consumer might ask for your assistance in contacting the EAP.

§ A decision is needed about whether or not you, as the provider, will be involved directly at the workplace.

§ Because Sam has not been taking his medication, it may be difficult for him to communicate as clearly as he would like. If Sam would like you to disclose on his behalf, a sample disclosure statement might be:

ASam wants you to know that his job is very important to him and he feels it is a good match for his skills. In fact, the job is so important to him that he got into some trouble. Sam has a mental health condition for which he

takes medication. He did not want to ask for time off to go to the doctor, and he became sick because he did not have his medication. Sam really wants to keep this job. He knows the workplace is busy, but was hoping that it could accommodate him by giving him a leave to get back to his old self on his medication. Sam wondered whether the EAP could help him get a leave (either he may be entitled to paid leave as a benefit or he can request an unpaid leave under the Family and Medical Leave Act). When Sam is ready to return to work, we were wondering if the EAP could help to set up a meeting with Sam=s supervisor to help him transition back to work?@

§ How would you help Sam plan for his meeting with the EAP if he prefers to go to the EAP directly?

§ Leader: Brainstorm suggestions from the group.

§ So how would your work with Sam be different if Sam prefers that you contact the EAP on his behalf?

§ Leader: Discuss question and make sure to include:

§ Written informed consent is required before you can act on Sam=s behalf.

§ A plan that covers all the points listed above is needed and should be worked out with Sam before you contact the EAP.

§ Remember, no decisions can be made without Sam=s participation.

§ Step 6: Determine how the contact will take place. How are meetings with the EAP set up? How does Sam find out?

§ Sam has to find out how meetings with the EAP are set up. He can:

§ Call Human Resources

§ Look through his benefits information

§ Ask his supervisor or co-workers (though this may be uncomfortable for Sam considering his situation)

§ Let=s try another example. This is someone who decides to use the support of the EAP proactively, before the first day of work, rather than someone like Sam who is referred to the EAP by his supervisor.

Another Example (10 minutes)

§ Leader, point out that Maria=s Situation is also on Handout 5. Read Example out loud.

Maria is about to start as an office assistant with a large electric company. She has obsessive compulsive disorder that is expressed as trouble leaving her house. She returns many times to clean her hands, checks to make sure the doors are locked and looks in her mail box before she can take the next step to get to her appointments. The community mental health care provider has helped her to plan an extra early start to her appointments to deal with this problem. Maria is afraid, however, that the 8 a.m. start time at work will be difficult. She is thinking of turning down the job offer. You suggest that maybe the workplace has flexible hours. How might you and Maria explore this option?

§ Leader: Lead a discussion with the group. Try to elicit the following answers. Offer any that do not come up from the group:

§ How might you determine whether or not there is an EAP?

§ Maria can contact the HR Department to ask if there is an EAP.

§ Maria=s provider can contact the workplace to ask about an EAP.

§ Maria can look through her benefits information if it has already been given to her.

§ Step 1: What is to be accomplished by going to the EAP? What will the provider/Maria say?

§ Maria wants to get an accommodation that will help her get this job.

§ She needs to clarify what support the EAP can offer during the negotiation and thereafter.

§ She might want to disclose that she has a mental health condition for which she needs a formal accommodation.

§ She might suggest accommodations that she feels will help.

§ Step 2: What will you or Maria disclose? Is there a disclosure plan?

§ Maria only needs to disclose that she has a mental health condition and

how symptoms interfere with her job, i.e., the early start time is difficult for her. She would like to have a later start time to take advantage of the hours when she is at her full potential. So she is only disclosing her symptoms in relation to her job. She does not need to reveal the diagnosis or describe other symptoms or issues.

§ She should make a disclosure plan that includes who, how, what, and when as discussed in the previous example.

§ Is Maria protected by the ADA at this point?

§ At this point, Maria is not protected by the ADA. If she does disclose that she has a mental health condition, she will be protected by the ADA and entitled to a formal accommodation, provided she is able to perform the essential functions of the job and the accommodation will not cause the employer undue hardship.

§ Step 3: Use the specific job description to translate concerns into the language of the workplace.

§ Maria=s condition interferes with job routines. She is afraid that it will be difficult to meet the 8:00 AM start time.

§ Step 4: Determine what you will ask the EAP representative to do.

§ She wants assistance in exploring whether or not there are flexible work hours.

§ She wants to get advice from the EAP on a strategy that will work in this workplace.

§ She needs to find out who arranges the accommodation and whether others have been accommodated in the past.

§ Step 5: Identify who will make the contact and with whom contact will should be made. Who will make contact, Maria or you? If it is you, do you have informed consent?

§ This depends on Maria=s level of comfort. Maria and the provider can make a plan that outlines what she will say and what the provider will say, if she wants the provider to be involved.

§ The provider must have written informed consent.

.Step 6: *Determine when and how the contact will take place.*

§ Maria, or you on her behalf, need to find out how to contact the EAP and how to set up an appointment. Is there an 800 number? Is there an on-site office?

How Providers Can Help EAP Professionals (15 minutes)

§ You and the EAP professional share the same interests - supporting the worker so that he or she can do the best job possible.

§ Although EAPs might be willing to partner with you to help consumers sustain work, there is no guarantee that they will know what to do.

§ Many EAP professionals are as unfamiliar with the concept of workplace accommodation as many providers. Accommodations, if they exist, for example, may have been negotiated through the Legal department and supervisor, and the EAP may not have been asked to become involved.

§ Many EAP professionals may not be familiar with the concerns and issues of people with mental health conditions who are working. Their focus may be on people with substance abuse issues or they may help people secure a disability leave instead of working on job retention.

§ In order for EAPs to be effective resources to people with mental health conditions, providers must be prepared to educate EAP professionals around issues of accommodation and what the needs are for persons working with a mental health condition.

§ Let's think about ways to do this.

§ Leader: Explore options with participants such as outreach to EAPs, working on a case by case basis, presentations at professional conferences for EAP professionals, etc.

§ To educate and work with EAP professionals, it is essential to be able to translate the concerns and needs of the consumer into the language of the workplace.

§ Accommodations must be appropriate to the job and be responsive to the needs of the individual and of the workplace.

§ Accommodations must be described in terms of the job, not the mental health condition. Discuss how the consumer needs changes in tasks, routines, relationships or the physical environment. Do not discuss symptoms or diagnoses. Be mindful of requirements in union contracts if one exists for this workplace.

§ Providers can enhance their partnerships with EAPs by providing support services to workers that meet the needs of working people. What might these be?

§ Leader: Brainstorm ideas with group. Add these ideas if they do not come up in discussion:

§ Advocacy regarding benefits

§ Documentation to support requests for accommodation or rights under Family Medical Leave Act

§ Evening hours for support groups around themes such as workplace communication, anger management and conflict resolution

Summing Up (10 minutes)

§ We have covered a lot of ground. We have learned what EAPs are and how they might support consumers at work, how to access the EAP and your role in insuring EAPs are responsive to the needs of working consumers. What do you think? Can you imagine partnering with EAPs? What seems like it would work? What seems like it won't work?

§ Leader: Encourage discussion.

§ We know that job retention is often difficult for people with mental health conditions. EAPs are another resource available to some consumers that might help. Consumers should always be counseled to try to protect workplace connections. With your input, consumers will be better able to access and utilize the additional assistance of EAPs.