

FORMAL MANAGEMENT REFERRAL GUIDE

FOR HR AND MANAGEMENT USE ONLY

	Standard/Urgent Formal Management Referral (FMR)	Substance Abuse Professional (SAP)	Fitness for Duty Evaluation (FFDE)
Description	A Standard/Urgent FMR is designed to aid the employee in navigating issues in the workplace and improving job performance. Formal sessions are administered by a master's level clinician. The number of sessions is determined according to the client's EAP session model. The FMR process provides feedback on performance standards such as attendance, participation, and compliance. A formal diagnosis or evaluation is not provided, and it is up to HR/the employee's company to determine if the employee is able to work during the FMR process.	A SAP assesses and addresses drug and alcohol related issues for employees in non-DOT and DOT regulated positions. A Substance Abuse Professional will conduct an assessment and provide recommendations for treatment. Recommendations differ from case to case based on the need. Recommendations often consist of a set number of hours of substance use education, additional sessions with a SAP, an intensive outpatient program, inpatient treatment, etc. Compliance with the recommendations is tracked and a second assessment is conducted by the SAP after recommendations have been completed by the employee.	A FFDE is a psychological evaluation that determines whether an employee can safely and effectively perform the functions of their position. A FFDE is requested when there is objective evidence that the employee may be unable to perform a defined job safely and effectively due to a psychological condition or impairment. An evaluative report is provided.
Provider	Licensed Mid-level EAP Clinician	Substance Abuse Professional	Psychologist
Reporting	AOH clinician will provide updates via email regarding: • Scheduling • Participation • Compliance	The SAP will provide two reports: • An initial report with treatment recommendations • A final report after recommendations have been completed with any follow-up testing recommendations	The psychologist will provide a report that includes recommendations on the following: • If the employee is safely able to return to work • If the employee is psychologically able to perform the essential functions of their position with or without reasonable accommodations • If there is an increased risk of harm to self or others in the workplace • Follow-up care
Fee	Covered Under the EAP Program *Exceptions: In-person sessions requested for a client with a Telephonic Session Model, or a FMR requested for a previously non-compliant employee. Both exceptions are a flat fee of \$450	Consult with AM regarding pricing Fee includes the assessment, tracking of recommendation completion, and reports from the SAP. Any additional costs associated with recommendations for treatment are not included in fee. *Admin fee may apply for a cancellation/no show	Starts at a Fee of \$2,250 and May Range up to \$5,000 Depending on the Fee from the Psychologist This fee includes the evaluation and the report. *Admin fee may apply for a cancellation/no show
Documents and Info Needed to Initiate Referral	• Formal Management Referral Form • Copy of LCA or PIP, if applicable	• Formal Management Referral Form • Copy of LCA or PIP, if applicable • Copy of drug/alcohol screening results, if applicable	• Formal Management Referral Form • Copy of LCA or PIP, if applicable • Copy of employee's job description