

How to Make a Formal Referral

Formal referrals are a powerful tool to address productivity concerns. When a workplace issue or pattern of poor job performance arises and previous attempts to correct the behavior have failed, a formal referral may be the next step.

A Formal Referral allows the supervisor to:

- Determine the focus of counseling
- provide input throughout the counseling process
- receive feedback regarding attendance and cooperation.

A typical process includes:

- Each organization determines its own process for formal referrals. It is important to check with Human Resources or your EAP coordinator to obtain the appropriate referral form before beginning the formal referral process.
- Fill out information on the formal referral form. This is a one page fill-in form.
- The employee signature on the formal referral form used by the EAP allows release of the following information:
 - Attendance at EAP sessions
 - Compliance with EAP Recommendations
- Then mail or fax the referral to Southwest EAP or your EAP coordinator, according to company policy, prior to the first appointment.
- Remember a management consultation is available at any point in this process.

1-800-777-1797 Fax 501-663-9488
or **Contact Us online**

- For a management consultation
- To support you through the intervention process
- To arrange a formal referral