



SELF REFERRAL PROCEDURES

When clients call in for services and no workplace issues are identified:

1. We call to see if you wish to take the referral. Please call us back promptly so we can take care of the client's needs.
2. We share the basics of the issues as we have assessed them.
3. We fax an authorization which specifies the maximum allowable sessions and the expiration date for those session to be used.
4. If the client is covered by another EAP and they are subcontracting with us to provide services, we may need other forms filled out. If so, we will fax those to you along with the authorization.

What we ask you to do:

1. Call us if you identify any kind of issues that would have impact on the workplace. We ask this so we can work with you to assure the best outcome for your client and for the workplace. This includes, but is not limited to:
 - Potential for violence against self or others
 - Substance abuse
 - Depression
 - Absenteeism
 - Conflicts with coworkers or supervisors
 - Reports of harassment
 - Requests to complete disability paperwork
2. Call us if you would like to staff a case with one of our risk managers. We recognize that challenging cases arise and we offer free, confidential peer support.
3. Fill out the Secure Online Billing Form, by the 6th of each month, to receive payment.

Complete and return any additional forms we may have sent from a subcontractor. We cannot pay if these forms are not completed.



FORMAL WORKPLACE REFERRAL PROCEDURES

When we identify workplace issues with a client, we work more closely with him/her to ensure the best outcome. We assist with:

- Accessing the best levels of care
- Pre-certifying insurance coverage
- Linking with disease management services and
- Leave of absences from and return to work, where needed

We also have obligations to report compliance with EAP recommendations in cases where there is a formal workplace referral or safety/security risk. We partner with you to provide the best services to the client. Confidentiality is paramount to us!

What we do:

1. A First Sun risk manager will call to see if you wish to take the referral. Please promptly call us back so we can take care of the client's needs.
2. We share the basics of the issues as we have assessed them.
3. We send the following:
 - An authorization specifying the maximum allowable sessions and the expiration date for those sessions to be used.
 - A letter describing the workplace referral process.
 - Workplace Referral Form — Briefly outlines the workplace problems.
 - Statement of Understanding Form — For the employee to sign, agreeing to use services.
 - Workplace Referral Release of Information Form — For the employee to sign to allow us to speak with management ONLY about whether or not the employee is participating in the EAP.
 - Provider Release of Information Form — For all workplace referrals we ask that you have the client sign this release and that you fax a copy to us.
 - Consent Form for Substance Use Referrals — For all workplace referrals involving substance use, we ask that you have the client sign this release and that you fax a copy to us.

What we ask you to do:

1. Fax the completed forms back to us.
2. Notify us after each counseling session with an update.
3. Notify us if the employee fails to attend a scheduled appointment.
4. Notify us immediately if there is a safety or security risk involving the employee.
5. Fill out the Secure Online Billing Form, by the 6th of each month, to receive payment.



RECEIVE MORE REFERRALS

We at First Sun EAP are frequently asked by network providers how to receive more referrals. We would like to share what we have learned from our clients.

TELEPHONE GREETING

An up-to-date professional greeting on your voice message is a must. Clients prefer a professional greeting that identifies the clinician. They also do not like a telephone greeting that is too casual. The client will call us back for a different provider if the telephone greeting doesn't identify the clinician or is too casual. Clients also call us back requesting a different provider when the clinician does not call them back within an appropriate time, generally one business day.

FRIENDLY STAFF

Warm, friendly and professional customer service is another factor in receiving referrals. Unfortunately, from time to time, clients call us back for a different provider referral because the client feels the individual they spoke with was rude or unprofessional.

WEBSITE

We have found that many clients access providers' websites to find out more about their practices. It is most beneficial to keep your website updated with any changes in your practice. If you do not currently have a website, you might want to consider developing one as more and more client's choose clinicians based on website information.

PRACTICE INFORMATION

As stated above, many individuals who contact us for counseling services have already researched the kind of clinician they would like to see. It is helpful for us to know as much about your practice as possible so we can share this information with our clients. Please contact us as soon as possible with any changes in your practice, new license and/or certifications or in the types of clients you like to work with.

We appreciate all you do as First Sun network providers. Please call if you have any questions.