

Welcome to the **Employee Health & Wellness Programme**



24/7
365



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



Western Cape Government
FOR YOU Education



Managerial Referral user guide
A guide to the formal referral process



Western Cape
Government

FOR YOU

Education

Toll-free number
0800 111 011

Email
wced@mhg.co.za



**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

Content

Introduction

WCED Employee Wellness Service

Benefits

WCED Employee Health & Wellness Programme, Services and Access

Manager consultation

Informal Referral, Self Referral and Managers Referral

Principles

The referral process

Addendum

Scope of Service



Introduction

WCED EHWP is an initiative implemented by employers to endorse health and wellness amongst the workforce. The programme encourages:

- Awareness on health-related issues
- Improvement of morale and often a reduction in the cost of healthcare throughout the company

The programme is aimed at finding practical solutions to personal, emotional or work-related challenges experienced in everyday life. An important feature to note is that the programme is voluntary.

Benefits

WCED EHWP Products, Services and Access

Objectives

- To understand the concept of WCED's EHWP
- To create a culture of wellness
- To get to know the wellness products and services and become familiar with how to access the former.

Reflection

Take a minute and recall an incident at work when one of your employees was in a crisis...

- How did you handle the situation?
- What steps did you take?
- Was it a comfortable experience for you?
- Did you have the necessary tools to attend to the situation?
- What would you do differently now?



**Western Cape
Government**
FOR YOU

Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

Benefits of WCED's EHWP

Employees

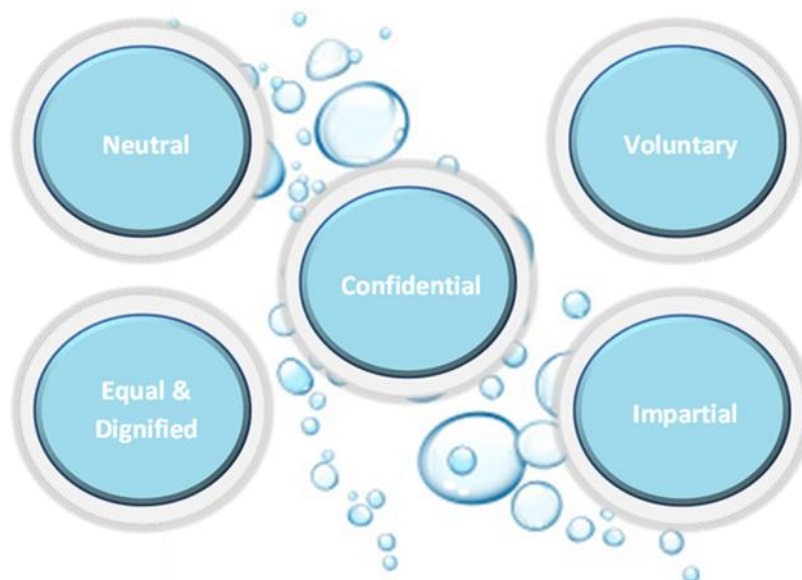
- Reduction of work-related stress and focus on safety
- Improve motivation and morale
- Create health awareness in employee community
- Aid employees to find solutions for work-related and personal problems
- Create an environment where employees feel cared for

Organisation

- Focus on employees
- Increase productivity
- Reduce costs associated with absenteeism, presenteeism, ill health, etc.
- A tool for performance analysis and improvement
- Assist in early identification and referral of employees with psycho-social and health problems
- Assist managers with the attraction and retention of talent
- Support with company safety initiatives

Principles of WCED's EHWP

WCED EHWP is governed by the following principles:





Confidentiality

Confidentiality is guaranteed. Information may be shared only with the written consent of the employee.

Neutrality

WCED's EHWP cannot be used as a disciplinary by management and therefore remains outside of any conflict areas between management and employee organisations. Therefore, it may not be drawn to testifying or witnessing in any labour disciplinary proceeding.

Accessibility

WCED's EHWP is accessible to all employees regardless of their positions. The relevant resources are also available to the employees' immediate family members.

Voluntary

The programme can be accessed on a voluntary basis, which is considered the most effective referral since it achieves the earliest possible interventions. Similarly, an employee cannot be forced to make use of WCED's EHWP, even in the case of a formal referral.

Impartiality

Making use of WCED's EHWP will not prejudice an employee's job security or chances of promotion.

Equal and dignified treatment

All employees and their family members accessing the programme will be treated in an equal and dignified manner.

Access

The majority of referrals to WCED's EHWP are **self-referrals**, initiated by the employee. Approximately 25% of referrals are initiated by referral agents of the company, usually a manager or supervisor.

WCED EHWP can be accessed in different ways:

Informal referral: As a colleague, supervisor, team leader, or manager of an employee, you may be requested to assist with resolving the problem. You can play a key role in helping the employee receive immediate or early intervention for personal concerns by suggesting that the employee can make use of WCED's EHWP. This recommendation should be made in a private and supportive manner.



Western Cape Government
FOR YOU Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



METROPOLITAN Health

Formal referral: If an employee with a proven record of excellent and good work, starts to exhibit declining work performance issues that may be related to a personal or work related matter, and does not respond to coaching; the manager may refer the employee to WCED’s EHWP. The manager will receive support and coaching from the WCED’s clinical team in order to assist with the identification of job performance issues. In addition, the manager will undergo a manager consultation in preparation for the initial confrontation with the employee.

Self referral: A confidential way to get professional support on personal issues which might have a direct impact on ones household or work related issues.

Manager consultation: A confidential way to get professional support on the referral process and manager related issues that may be experienced. The manager receives a benefit in exploring options regarding people management, receives guidance on how to communicate the performance problem to the employee and is offered guidance on confrontation with the employee in a productive and appropriate manner. The manager also receives guidance regarding realistic performance expectations of the recovering employee.

Manager can contact the WCED EHWP helpline at any time to discuss:

- Their own personal or work-related issues
- Any problem related to an employee, e.g. absenteeism, conflict, poor performance, etc.
- The supportive confrontation meeting with an employee
- The referral procedure and follow up process

How do I contact WCED’s EHWP?

Email address	Toll-free number	Please call me and SMS
wced@mhg.co.za	0800 111 011	083 450 0508
eap@metropolitanhrm.co.za		



Western Cape Government
FOR YOU Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



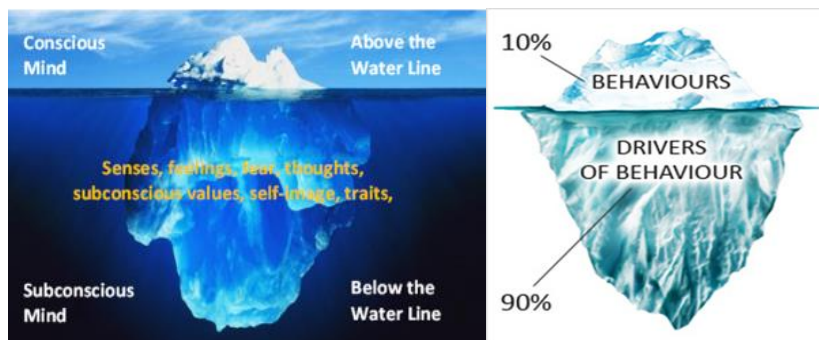
Manager consultation and formal referral process



Referral Process

- Understanding the formal referral process
- Becoming familiar with the relevant forms required to complete the referral
- Understanding the manager consultation component of WCED's EHWP

The characteristics of which you are most conscious are your knowledge and skills, depicted as the tip of the iceberg. Skills represent what you can do and knowledge is what you know, including your experience of things and situations.





Western Cape
Government
FOR YOU

Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



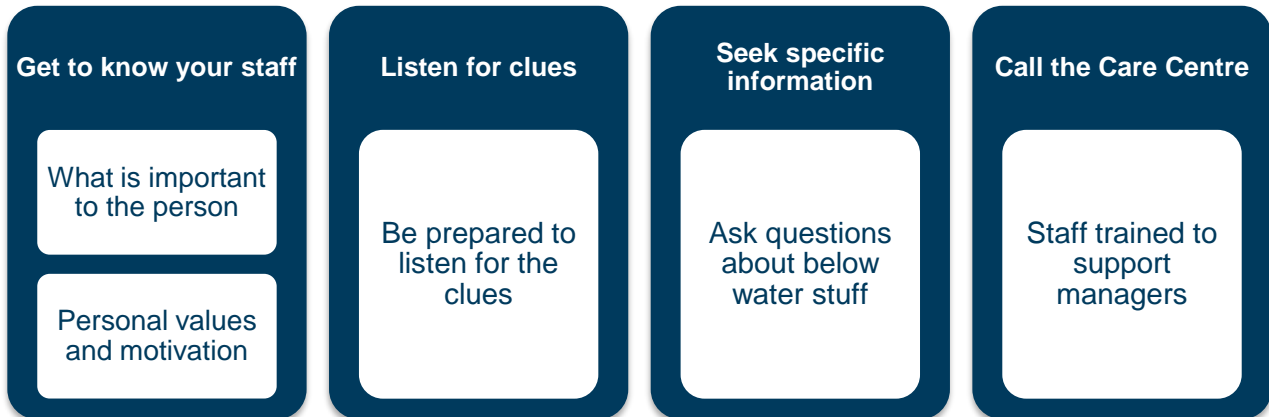
**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

Strategies for understanding the “below the water” elements



Possible referral situations

- Absenteeism/poor time keeping
- Changes in the quality/quantity of work
- Deterioration in relationships with others
- Obvious emotional distress
- Emotional liability, moodiness, irritability
- Changes in personal conduct
- Social withdrawal
- Deterioration in appearance
- Signs of emotional stress
- Increase in conflict
- Decrease in morale and motivation
- Depression
- Unacceptable personal conduct
- Lack of focus
- Poor decision making and reduction in overall performance
- Complaints from colleagues about work
- Contributing factors – financial, legal, performance, social and family issues

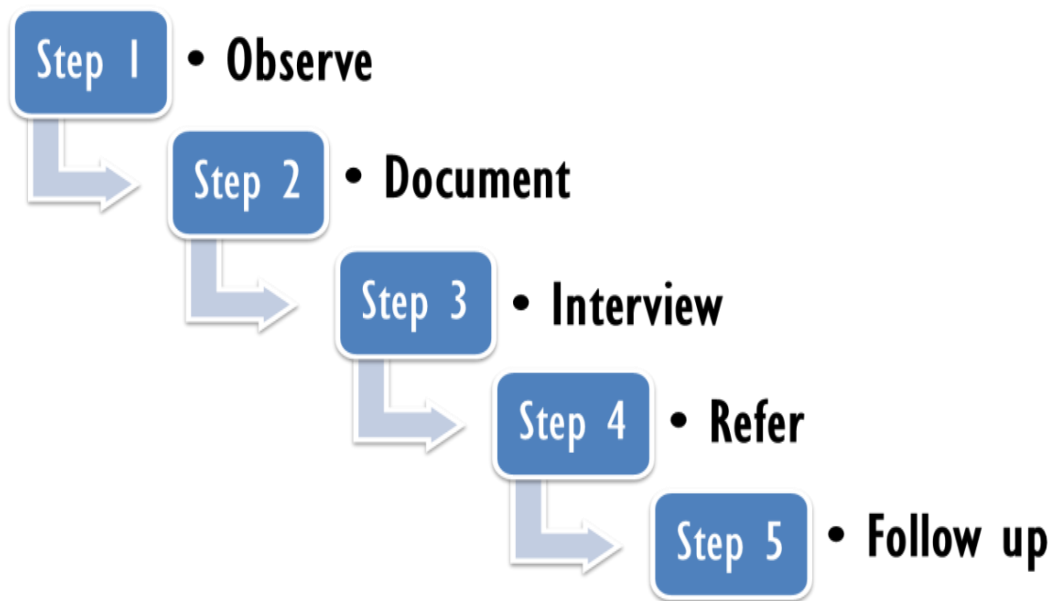


YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



The five step process



Step 1: Observation

The manager needs to be observant of the employee’s sudden change in behaviour, lowered productivity, unnecessary absences, compare the performance within the last 6 to 12 months or with that of co-workers and continuously assess changes in the employee’s tasks, roles and relationships.

Step 2: Documentation

The key to early identification of a performance problem and the potential impact is to ascertain a pattern of decline over time. It is essential to be aware of the warning signs that may signal a latent problem and document the performance concerns. Documentation is considered to be a useful tool to achieve the following:

- Focus on observable, verifiable facts in an objective manner.
- Identify a possible pattern of behaviour.
- Work with WCED’s EHWP to identify the key problem/s.
- Determine when to address the manager’s concerns with the employee.
- Prepare for and conduct an effective supportive confrontation meeting.
- Help the employee to recognise the problem and its severity.
- Present the declining work performance in a factual and non-judgemental manner.
- Stay focussed on job performance.



Western Cape Government
FOR YOU Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



METROPOLITAN Health

Step 3: Interview

<p>Increased absenteeism Unexcused absences Repeated short absences Abnormally high number of absences for minor illnesses</p>	<p>On the job absenteeism Increased number and length of tea breaks, increased lunches Physical illness on the job (headaches, stomach aches) Complaints from co-workers</p>	<p>Concentration problems Greater effort to finish work Jobs and projects take longer Easily distracted</p>
<p>Confusion Difficulty in recalling instructions and details Increasing difficulty in handling and completing assignments</p>	<p>Erratic work pattern Extremes of high or low productivity Extremes in quality of work Having to put in extra hours to finish work</p>	<p>Lowered job efficiency Missed deadlines Increased number of errors Wasted time and material Poor decision making</p>
<p>Conflict with co-workers Overreaction to real or imagined criticism Wide mood swings</p>	<p>Unusual behaviour Temper tantrums Physical violence Emotional outbursts</p>	

The supportive confrontation (interview) is one technique that enables the manager to objectively address performance issues and assists in the avoidance of a quick sand trap. The interview provides an opportunity to discuss the performance problem with a genuine offer of assistance. The meeting should commence and end with actions that are supportive and the confrontation is fixed in the middle.

Guidelines whilst in the interview

- Select a confidential setting.
- A clear mind is required with a conscious focus on the availability of the employee.
- Suspend moral judgement.
- Utilise empathy and show interest.
- Think more and talk less.
- Be factual.
- Explain WCED's EHWP as a form of assistance and not a punitive measure.
- Specify the reason for referral
- Be specific about the performance or behaviour pattern.
- Clarify that the goal is to be supportive as opposed to punitive.
- Agree on expected outcomes and how WCED's EHWP works.
- Reinforce employee's strengths.
- Collect the employee's opinion on the facts provided with a restriction to work performance issues.
- Reach consensus with the employee on the performance issues and document the agreement.
- State your expectations for employee participation and the time frame in which contact is to be made.

The manager initiates an immediate action plan to restore the performance level and decide which of the following actions should be taken:

- Referral to WCED's EHWP



Western Cape
Government
FOR YOU Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

- Corrective disciplinary action , and or
- Concurrent WCED intervention with the corrective disciplinary action
- Proceed with the formal referral.
- Set follow-up dates and times to discuss progress.

The “Do’s”

- Do ask precise questions.
- Do use open ended questions.
- Do use as few questions as possible.
- Do use a statement when possible.

The “Don’ts”

- Don’t try to diagnose the problem.
- Don’t take responsibility for solving the employee’s problem.
- Don’t generalise about the employee’s job performance.
- Don’t moralise; restrict your criticism to job performance and attendance.
- Don’t cover up for a friend. Misguided kindness can lead to serious delay in the employee receiving help.
- Don’t be misled by sympathy evoking tactics by the employee.
- Don’t interrupt the employee.
- Don’t become involved in side issues or “bargaining”.

Step 4: The referral

A formal referral is a process during which the manager/supervisor receives advice and guidance on managing the impaired work performance of an employee; and the employee receives counselling for issues impacting workplace productivity.

An informal referral is where the manager assists the employee in making the referral and supports the employee throughout the process. The employee’s existing problems do not impact satisfactory work performance.

The process:

- A line manager makes contact with WCED’s EHWP via telephone, email and/or SMS.
- The case manager conducts an assessment on the nature of the problem presented and explains the process and procedures to the referrer.
- Potential solutions and suggestions are explored with the referrer.
- If the problem is resolved and a viable solution is found, the consultation process is terminated and there is no need for a formal referral.
- If the problem persists, the case manager initiates a formal referral process for the employee.
- Formal referral forms are sent to the manager who needs to discuss the referral with the employee.
- Signed formal referral forms are returned to the case manager.



Western Cape
Government

FOR YOU

Education

Toll-free number
0800 111 011

Email
wced@mhg.co.za



**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

- The case manager contacts the clients for an initial assessment, explains the process to the referred employee and obtains their preferences.
- The case manager locates an affiliate within the affiliate network that matches the needs of the client on the same day as receipt of the case.
- The affiliate is sent a referral with a telephonic briefing and a written briefing document with the client's details.
- The referrer is informed of the date of the first appointment once feedback is received from the affiliate.
- Employee intervention with the affiliate commences. An assessment is done and a treatment plan is drafted to address the presenting problem.
- The case manager sends an initial assessment report to the referrer after receiving the affiliate's feedback from the initial session 48 hours after the session.
- The case manager supervises the process with the affiliate and ensures that the process is completed. Any difficulties are communicated to the referrer.

Step 5: Follow up

Follow up after the interview is an important component in preparation for the employee's return to work after intervention. The following should be taken into consideration:

- Maintain confidentiality by keeping all discussions with the employee and manager private.
- Don't be overly sensitive or empathic.
- Continue to manage the employee's work performance and document improvement or decline.
- The manager should make time with the employee to provide guidance or discuss concerns the employee may have.
- Support positive behavioural change.
- Follow through with the disciplinary procedures if necessary.

Manager feedback

Confidentiality will not be compromised considering it is the foundation of the programme and every case is well protected. At the initial interview with the manager, it is essential for the employee to agree to WCED's EHWP counselling and the nature of the feedback that will be required during and after the process is complete. At the first session with the therapist, the nature of feedback is discussed and consent to release information is completed and signed by the employee.

The therapist does not feedback to the manager but to the Metropolitan case manager. This protects the employee/client/counsellor relationship. A final feedback report is given to the manager once the counselling process is completed.



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



Summary

The success of an intervention largely depends on the level of support from the manager. The aim of WCED's EHWP is to provide appropriate and timeous interventions to mitigate the risk and potential impact on the employee and the employer. The intention is to contain and assist the employee to deal with the presenting crisis and return to optimal levels of functionality across their personal and work lives.

The formal referral guide

A formal referral is when the work performance of an employee is affected/impaired; a manager will formally refer an employee to receive counselling for the issues impacting workplace productivity. There is a formal referral form that must be completed by the referring manager or referring WCED coordinator/manager and the employee concerned gives consent by signing the form acknowledging the referral. The referring manager will be the one to receive written feedback. Should, at any stage, feedback be requested by the WCED coordinator/other manager or other third parties, they will have to liaise directly with the referring manager.

An informal referral is where the manager/WCED's Wellness Manager or Coordinator/ HR assists the employee in making the referral and supports the employee throughout the process. The employee's existing problems do not impact satisfactory work performance. No feedback is given to the manager or WCED's Wellness Manager or Wellness Coordinator/ other manager or other third parties as this is classified as a self-referral.

Addendums

Addendum 1: Step-by-step guide to managerial referrals

- Consult with the employee regarding the reason for referral. There should be consensus between the manager/supervisor and the employee regarding:
- The nature of the affected work performance in the case of formal referrals (i.e. the problem definition);
- Examples of affected work performance in case of formal referrals;
- Agreement on the desired outcome/s.
- Complete the Managerial Referral Form:
- Ensure that the reason for the formal referral is explained in detail;
- Ensure that the document is signed by both the manager/supervisor and the employee.
- Call the Momentum Metropolitan call centre for manager/supervisor support:
- A member of our team will assist and guide the manager/supervisor to effectively manage an employee's affected work performance;
- Email the formal referral form to the call centre at eap@metropolitanhrm.co.za
- A member of our team will have a telephonic consultation with the employee to explain the referral process and to make arrangements for an appointment with a counsellor/therapist;
- Keep a copy of the formal referral form for your own records.
- Give the original form to the employee to take to the counselling session.
- Feedback will be provided to the referring manager only.



Western Cape Government
FOR YOU Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



YOUR WELLBEING IS IMPORTANT TO US

Employee Health & Wellness Programme



METROPOLITAN Health

Feedback will not be given to referrals that are received via SMS, telephone and email without the managerial referral form being completed. We do take cognisance that there are certain circumstances where a form might not be sent immediately. In such cases, as soon as you are able to complete a form, please send it through in order to receive the feedback.

Addendum 2: Scope of services

Telephonic counselling	Face-to-face counselling	Trauma counselling	Legal advice	Financial advice	Health information

- Face-to-face counselling
- Telephonic counselling (national toll free number)
- SMS, Please-call-back and email
- Unlimited telephonic legal advice (includes one face-to-face session)
- Unlimited telephonic financial advice
- Crisis and or trauma counselling
- Manager and referral agent support
- Referral services to appropriate providers outside of the EHWP
- Executive and senior management support



Western Cape
Government
FOR YOU

Education

Toll-free number
0800 111 011
Email
wced@mhg.co.za



**YOUR WELLBEING
IS IMPORTANT TO US**

Employee Health & Wellness Programme



METROPOLITAN
Health

The service is available nationally in a language of your choice, seven days a week throughout the year.

Lifestyle management

Unlimited telephonic advice Garnishee orders Divorce Child custody Property Insurance Qualified attorneys Will drafting One free 30 min consult	Unlimited telephonic advice Over indebtedness Debt management Garnishee orders Budget Retirement Financial wellness Investment	Health information Hello Doctor
---	---	------------------------------------