

## EAP BASIC REFERRAL AGENT COURSE

(May 2003)

The five-day course was offered in Rigaud (French course). There were 12 participants from Ottawa and the Quebec regions. It is interesting to note that Head Office received over 90 applications from employees interested in becoming referral agents. The National EAP coordinator gave the course with the assistance of two regional coordinator counselors (Lyna and Nathalie).

The Employee Assistance Program was explained. It included the Program mandate, the structure, the policies, and the role and responsibilities of all the stakeholders. The external facet of the Program was very often mentioned, so was the unions role.

Most of time was spent on the perimeters of their role as referral agents. It was explained that very often, people go to them because they are not sure where to go for help. Sometimes, they just want to ventilate their frustrations or share their pain and are not ready to go and see a “professional”. The RA role is basically to “listen and to refer if necessary”. It does not mean that they do not say anything, you have to show an interest and help the person see the situation more clearly by asking a few questions about the situation and what the employee has done so far to address the issue (have you talked to the union, Human Resources, members of your family?), most times people resolve their own problems once they have talked about them. If they need serious help, they will go directly to professionals. The coordinators counselors were very insistent that since RA do not do an “analysis” of the situation or make assumptions, they should always refer to the external contractors or the coordinator counselor. The exceptions would be unless it is very clear that it is a staff relation issue and they should see the union or Human Resources or it is just a request for information.

It was made clear (a hundred times) that they are not to give advise, to counsel, to sympathize, to judge, to talk about their own experience (how they handled certain situations,) try to resolve the problem, suggest options, etc...They are not to ever talk to members of the family.

In order to better understand the limits of their role and to put it into practice, at least two days were spent on role play; the “client” and the referral agent. The sessions were video taped and were followed by a de-briefing. It was most effective. Participants were very nervous of exceeding their role. Some of the situations were:

- An employee being refused disability insurance
- A woman discouraged because her husband is acting very strangely and is forgetting everything. She want the RA to talk to her husband and convince him to see a doctor
- An employee very frustrated that she did not win the competition
- A very “tired” woman with too many responsibilities and fed up with everything.
- Conflict between parents and daughter

The course also included sessions on:

- Confidentiality, including the Code of ethics that sets out the ethical attitudes expected of EAP practitioners
- The legal considerations in an Employee Assistance Program
- Techniques of active listening
- Critical Incident Stress
- Leave to access EAP services (code)
- Statistical forms to complete
- Community resources
- Statistics

I found it to be a very interesting course. If referral agents go beyond their mandate, it is of their own initiative and certainly not because it was not made clear to them at the Basic Referral Agent course.

***In conclusion, it is my opinion that the role of the referral agents is very different than that of a union representative. I do not believe that union representatives should be (or could be) referral agents. We are trained to give advice, to guide, to resolve situations, to speak on behalf of our members, to represent, to intervene, etc...Referral agents cannot do any of these roles. It would be very difficult to listen to someone and not offer to help resolve his or her situation.***