

The Supervisor's Toolbox:

Job Performance Referrals

The Job Performance Referral (JPR) can be a useful tool for both managers and their employees. It can provide employees, who may be exhibiting a decline in their job performance, an opportunity to obtain the resources they may need to restore their performance to an acceptable level. JPR's are often very useful tool for managers who are uncertain about the best way to deal with an employee who seems to be struggling with her or his job duties.

When making a Job Performance Referral:

1. Remember that participation with the Employee Assistance Program (EAP) is generally voluntary and confidential. Employees who have violated a company drug/alcohol policy may be required to be evaluated by the EAP – prior to their return to work. This is especially true in cases where the employee has tested positive on a drug test. Employees who choose not to be evaluated may be in violation of the company's drug-free workplace policy.
2. The EAP is separate from your company's formal disciplinary process. It is merely a useful tool to use when trying to intervene with your employee and his or her performance issues.
3. The EAP will only report to you whether or not the employee has made CONTACT and whether or not the employee is COOPERATING with recommendations. Do not expect to receive detailed information about diagnosis or recommended treatment plans. This reporting can only be given to a designated contact person once a Release of Information document has been signed by the employee.

When you make a formal Job Performance Referral, make sure that you call the EAP BEFORE meeting with the employee. Be prepared to provide the following information:

1. What is the specific event/incident that prompted your referral?
2. What is the employee's position, length of service and performance history?
3. Is there any current/previous involvement with the disciplinary process?
4. What exactly is the employee's current status? Is she or he suspended, on probation, on 2nd or 3rd warning? If suspended or on probation, how long will this last and what are the requirements she or he must fulfill before returning to duty?

Recommendations and responsibilities for the referring supervisor:

1. Documentation must be timely, objective, and factual.
2. Meet face-to-face with the employee to discuss the performance issues.
3. Review the documentation, expectations for change and what the consequences will be if the performance does not improve.
4. Continue to monitor and document identified performance issues.
5. Consult with Human Resources as needed.

Follow-Up

If you've gotten to this point, you've made an investment of time and energy in this employee. Don't waste it. Follow through with scheduled review meetings. Check performance against objectives. If the objectives are met, that is GREAT. You've achieved a success not only for yourself but also for the company. A valued employee has been retained, and has succeeded in being responsible for her or himself in the workplace.

If performance doesn't improve, follow through with the appropriate corrective action. Hold the employee accountable, just as your boss will hold you accountable.

Recognize your limitations. All employees will not respond in a productive way. That is their choice. Your responsibility has been fulfilled when you identify, assess, document, get help, take action, refer for assistance when appropriate, and follow-up.

