

Guide: Engaging Employees Early

For EAP Professionals – Bridging the Gaps

Introduction

Early engagement is key to preventing escalation of stress, mental health concerns, or substance use in the workplace. EAP professionals play a vital role in identifying employees who may benefit from support and connecting them to appropriate resources.

This guide provides a **step-by-step framework** to engage employees proactively while maintaining trust, confidentiality, and compliance.

1. The Importance of Early Engagement

- Detect potential concerns before they impact performance or well-being.
 - Reduce workplace stress and improve employee morale.
 - Encourage employees to utilize EAP and wellness resources.
 - Support a recovery-friendly, safe, and productive workplace.
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2. Steps for Early Engagement

Step 1: Observation & Documentation

- Monitor for behavioral, performance, or physical indicators.
- Record trends objectively using tools like the **Behavior & Performance Tracker**.
- Avoid assumptions—focus only on observable actions.

Step 2: Initial Check-In

- Schedule a **private, confidential meeting** with the employee.
- Use **empathetic, non-judgmental language**:
 - “I’ve noticed X behavior recently and wanted to check in.”
 - “I want to make sure you have the support you need.”
- Keep the conversation **fact-based** and supportive.

Step 3: Offer Resources

- Share voluntary wellness tools:
 - Workplace Wellness Questionnaire
 - Self-assessment or stress management resources
- Inform employees about EAP services, counseling, and referral options.

Step 4: Collaborative Action Plan

- Encourage employees to identify supportive strategies that work for them.
- Discuss reasonable accommodations, flexible schedules, or workload adjustments if needed.
- Set expectations for follow-up or progress review.

Step 5: Follow-Up & Tracking

- Schedule **regular follow-ups** to monitor progress and provide ongoing support.
- Document engagement and outcomes using the Behavior & Performance Tracker.
- Adjust support strategies based on feedback and observed improvements.

3. Communication Best Practices

- Focus on **empathy, listening, and validation**.
 - Avoid stigmatizing language or assumptions about personal choices.
 - Reinforce **confidentiality** and voluntary participation in support programs.
 - Maintain a balance between **support and accountability**.
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4. Sample Engagement Workflow

1. **Observation:** Identify trends or behaviors that may indicate stress or challenges.
 2. **Check-In:** Initiate private, supportive conversation.
 3. **Screening:** Offer self-assessment tools and wellness questionnaires.
 4. **Resource Connection:** Provide access to EAP services or external support.
 5. **Action Planning:** Collaborate on next steps with the employee.
 6. **Follow-Up:** Review progress and adjust support as needed.
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5. Tips for EAP Professionals

- Build **trust and rapport** with employees before engaging.
 - Document interactions carefully while maintaining confidentiality.
 - Use **positive reinforcement** to acknowledge improvements or effort.
 - Educate managers about **supportive engagement strategies**.
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6. Resources & References

- Workplace Wellness Questionnaire (fillable PDF)
 - Behavior & Performance Tracker (fillable PDF)
 - Early Identification Guide (PDF)
 - [Bridging the Gaps EAP Resource Hub]
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7. Contact & Support

For additional guidance, training, or partnership opportunities:

Bridging the Gaps EAP Support Team

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