

# Referral Scripts & Guidance

*For EAP Professionals & Supervisors – Bridging the Gaps*

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## Introduction

Referral to appropriate treatment or wellness resources is a critical step in supporting employees who may be experiencing stress, behavioral challenges, or substance use concerns. This guide provides **practical scripts and guidance** for EAP professionals and supervisors to make referrals with empathy, clarity, and professionalism.

Use this guide to **encourage engagement**, maintain trust, and ensure employees understand available support options while protecting confidentiality and compliance.

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## 1. Preparing for a Referral Conversation

Before initiating a referral:

- Review **employee observations** and relevant documentation objectively.
  - Identify the **purpose of the referral** (e.g., EAP counseling, treatment program, wellness support).
  - Confirm **available resources** and next steps.
  - Choose a **private and confidential location** for the discussion.
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## 2. Opening the Referral Conversation

**Goal:** Establish a supportive and non-judgmental tone.

**Script Example:**

“Thank you for meeting with me today. I want to check in with you and discuss some resources that could provide support. My goal is to make sure you have access to help if you need it.”

**Tips:**

- Use **empathetic, neutral language**.
  - Avoid assumptions or labels about substance use or personal challenges.
  - Emphasize **voluntary participation** and confidentiality.
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### 3. Discussing the Need for Referral

**Goal:** Frame the referral as a supportive step, not a punishment.

**Script Example:**

“I’ve noticed some changes in [behavior/performance], and I want to ensure you have access to support. Our EAP offers confidential counseling and wellness services that many employees find helpful.”

**Tips:**

- Focus on **observable behaviors** and workplace impact.
  - Reinforce that the referral is meant to **support success and well-being**.
  - Allow the employee to respond and share concerns.
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### 4. Presenting Options & Next Steps

**Goal:** Provide clear, actionable choices for employees.

**Script Example:**

“Here are a few options: you can meet with an EAP counselor this week, explore wellness programs, or participate in stress management workshops. Which of these would feel most helpful for you?”

**Tips:**

- Offer **multiple resources** when possible.
  - Encourage the employee to **choose the approach** that feels comfortable.
  - Provide written or digital information about programs or services.
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## 5. Handling Resistance or Hesitation

**Goal:** Maintain professionalism and support, even if the employee is reluctant.

**Script Example:**

“I understand this may feel unexpected. My role is to ensure you’re aware of the resources available. You can access them at any time, and I’m here to support you when you’re ready.”

**Tips:**

- Stay **calm, patient, and non-confrontational**.
  - Avoid pressuring the employee.
  - Emphasize **confidentiality and voluntary engagement**.
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## 6. Documenting & Following Up

- Record the conversation objectively, noting **observed behaviors, recommendations, and employee responses**.
  - Schedule follow-ups to review engagement and progress.
  - Maintain confidentiality and share documentation only with **authorized personnel**.
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## 7. Sample Quick Reference Table: Referral Scripts

| Situation               | Opening Script                                                        | Support Offer                      | Follow-Up                    |
|-------------------------|-----------------------------------------------------------------------|------------------------------------|------------------------------|
| Stress or burnout       | "I want to check in and discuss support options."                     | EAP counseling, wellness workshops | Schedule follow-up in 1 week |
| Performance concerns    | "I've noticed X behavior and want to ensure support is available."    | EAP, coaching sessions             | Document and review progress |
| Suspected substance use | "I've observed changes and want to ensure you're safe and supported." | EAP referral, treatment options    | Confidential follow-up       |

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## 8. Contact & Support

For further guidance or training:

**Bridging the Gaps EAP Support Team**

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**Phone:** 540-535-1111