



SAGE Performance Related Mandatory Referral Form

PRIVATE AND CONFIDENTIAL

(To be completed by the Supervisor / Manager at the time of the PERFORMANCE-RELATED referral. The writer will provide SAGE with this memo before the first contact and intake interview.)

TO: SAGE EAP Counsellor

DATE: _____

FROM: _____
(Manager)

RE: _____
(Employee's name, address, work location)

1. Details of events which necessitated the performance-related referral.

2. Manager's comments and expectations from the referral.

cc: Employee
Manager



SAGE Performance Related Release of Information

PRIVATE AND CONFIDENTIAL

I, the undersigned, give permission for _____(Counsellor) to release only the information outlined below to appropriate representatives of _____ including:

- a) did I arrive for my first scheduled appointment?
- b) is my referral to the Employee Assistance Program considered appropriate?
- c) did the counsellor and I agree on a focus and plan for counselling or treatment?
- d) what time away from work, if any, will be needed to allow for treatment / counselling?
- e) what work performance is expected of me during the treatment / counselling?
- f) the counselling of my involvement with EAP.
- g) did I stop treatment early and/or did I break any appointments without proper notice?

I understand that the counsellor will contact the Company Representative after the first appointment with respect to items (a) and (b), at the end of the assessment phase to discuss items (c) , (d), and (e), at closing to discuss item (f), and at any time to discuss item (g).

(Employee's signature)

Date

Witness