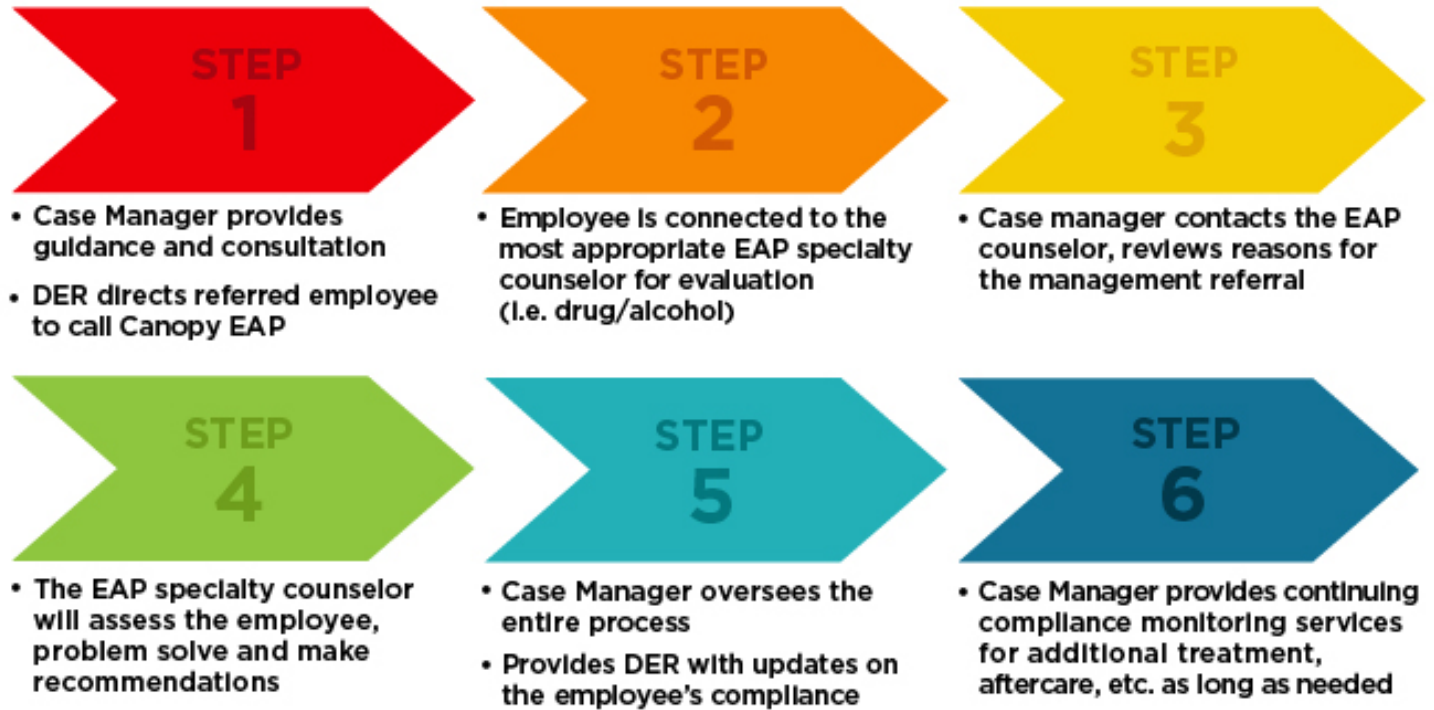


# Performance Based Referral Process

When the **Designated Employer Representative (DER)** contacts Canopy they are immediately connected to a case manager. The case manager reviews pertinent information with the DER including concerns about the employee's performance. A plan is then developed to address these concerns. Part of this plan could include a management referral.



With written permission, our standard management referral release of information form allows Canopy to report the following types of information:

- Dates and times of EAP appointments
- Whether or not the employee completed the EAP assessment
- Whether or not recommendations for further treatment or other services were made
- Whether or not the employee is following those recommendations

Under some conditions additional information may also be released with the employee's written authorization.

Canopy maintains periodic contact with the employer at a frequency mutually satisfactory to the referring supervisor/manager and Canopy. Normally this frequency would be in accordance with the specific circumstances of the case and the needs of the employer. During these contacts, Canopy provides updated information as to the employee's progress in the program, whether the employee continues to comply with recommendations and consults with the employer on matters related to the employee's performance, attendance and conduct in the workplace. This follow-up continues until the employee has successfully completed the recommended program.

Additional details regarding Performance Based Referral Process can be found here: [canopywell.com/performance-based-referral-paperwork](https://canopywell.com/performance-based-referral-paperwork)