EAP Paperwork* Tips

Client completes Pages 1-2; Affiliate completes Pages 3–5**

(Be sure to write legibly)

Step 1- Schedule the 1st Appointment:

- Ask the client(s) to **arrive 15 minutes early.**
- Call First Advantage (FADV) with the appointment date & time (800-935-9552 ext.1)
- **Remember,** each individual client can be seen face-to-face the allotted number of EAP sessions. *Example: For a 3 session model, a client may be seen once individually and twice with a family member.*
- You should have a separate case number for **each** client.

Step 2- 15 Minutes Before the 1st Appointment:

- Each client should complete:
  - Statement of Understanding **(p.1)** (a parent/guardian should sign each child's)
  - Client Data Form (**p. 2**)
- **If a client does not sign the Statement of Understanding, the session should be terminated.**

Step 3- Assessment: If the client is allowed to have **at least 3 sessions**, you *may* use all 3 for the assessment. Complete the following:

- Session Documentation & Invoice Form **(p.5)** – document **each** session here.
- Individual Assessment Form **(p.3)** or the Child Health Form **(p.7)** for children.
- Begin Case Summary Form **(p.4)**
- Depression Screening Tool: If the PHQ-9 was included in your packet, please complete this for the client as well.
- Release of Information (ROI) **(p. 6) -** have client sign this **if the case is a supervisory referral** (in order for First Advantage to speak with the supervisor. If the client refuses to sign, document this in the case record.)
- *Brief Symptom Inventory (BSI) – copies are available upon request.*

* * FADV's workplace services supervisor is always available for consultation. Please call to discuss any case.

Step 4- Short-Term Problem Resolution OR **Referral**

- **Short-Term Problem Resolution:** If the case is appropriate for short-term problem resolution, any allotted EAP sessions beyond those used for the assessment can be used for short-term problem resolution.
- **Referral:** If appropriate, refer the client either within his/her insurance or to a community resource. Document discussion with the client about the need for a referral and the appropriate resources.
  - Have the client sign an ROI to contact the referral resource to discuss the potential referral.

Step 5- Follow-up and Case Closing / Billing

- **Note:** If the client fails to attend the 1st session, First Advantage will reimburse you for a half-session.
- Contact the client to assess progress within 2 weeks of the last session.
  - Verify that the client is connected with the referral resource, if appropriate.
  - Determine if s/he needs further assistance.
  - If unable to reach client, attempt 2 more times and document these attempts.
- Complete:
  - Session Documentation & Invoice Form
  - Case Summary Form

• Bill for the number of sessions, not the number of clients seen in a session.

• Do not send an invoice (even a $0 statement) to the client.

• Submit **all original forms** to First Advantage for **reimbursement** (*Statement of Understanding, Client Data Form, Individual Assessment Form, Case Summary Form, Session Documentation and Invoice Form, and any necessary ROIs.*) Please mail to: P.O. Box 1670 Bethesda, MD 20827.

** Additional paperwork packets or copies of individual forms can be obtained by calling 800-935-9552x1 or from our website (www.fadv.com/eapsap; go to the Affiliates section; Username: affiliates Password: fadv – then click on "EAP Cases.")*

***Client is defined as anyone who attends the session*

It is never First Advantage's intent to hold or deny payment to any Affiliate. Failure to follow-through with a client or to properly document your work can result in a delay in payment until the necessary forms are received. Cases closed beyond 60 days of the last follow-up call will be reimbursed in accordance with your contract with First Advantage. We thank you in advance for your cooperation and look forward to a long working relationship.