



**New Avenues**  
Midwest Behavioral Health Network

**Mental Health in the  
Workplace**

***What Would You Do?***

Presented by  
LouAnn Dobbins, MS  
Nancy Pietrangeli, MS

Indiana Chamber of Commerce  
HR Conference

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## Best Practices

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- Policies and Procedures
- Observation
- Documentation
- Early Intervention
- Referral

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## Policies and Procedures

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- Regularly review and update policies and procedures to keep up with evolving legislation.
- Legalization of Marijuana in many states may require updates to Substance Abuse Policies.
- Current focus on mental health and privacy concerns calls for employers to be more sensitive and to tread carefully.

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## Observation

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- Be aware of unusual behaviors or changes in an employee's work pattern, attitude, physical appearance or grooming.
- Are other employees avoiding an employee or commenting about him or her?

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## Documentation

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- Document your observations
- Document observations or concerns of other credible persons such as a supervisor or close co-worker.
- Trust but verify. Follow-up the reports of others with your own observations.
- Look for patterns in the events documented.
- Focus on performance issues, policy violations.

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## Early Intervention

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- Once you have sufficient documentation to establish a performance issue or policy violation, meet with the employee. (In the event of a serious issue, address the situation immediately).
- Talk with the employee in a private but safe place. Have another member of the management team, perhaps the employee's supervisor, present.
- Do not delay in dealing with the problem.
- Document the meeting.

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## Discussion with Employee

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- Clearly define the problem.
- Explain the significance of the problem for the employer.
- Be constructive & “partner” with employee to find a solution.
- Express concern and offer help.
- State the consequences.

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## What to Document

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- Date of conversation
- Your name and title
- Employee’s name and title
- Name and title of anyone else present
- Specifics of the issue
- Employee’s response
- Action taken

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## Making an EAP Referral

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- Contact Your Employee Assistance Program (EAP)
- Evaluation by mental health professional
- Recommendations / Treatment Protocol
- Confidential
- Reduces potential liability for employer

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## Contact Us to Learn More

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- EAP as a Management Tool for Helping Employees
- Work-Life Resources Demo
- EAP ROI Calculations (specific to your company)
- EAP Proposal and Pricing

LouAnn Dobbins, MS  
Coordinator of EAP Business Development  
Cell: 574-340-0704 ~ [ldobbins@NewAvenuesOnline.com](mailto:ldobbins@NewAvenuesOnline.com)

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*Your Path to Well-Being*

For confidential services, contact  
New Avenues Employee Assistance Program  
574-232-2131 ~ 800-731-6501  
[www.NewAvenuesOnline.com](http://www.NewAvenuesOnline.com)



**Employee Assistance Programs**  
Toll Free: 800.731.6501  
Telephone: 574.232.2131  
Fax: 574.271.5980

**Midwest Behavioral Health Network**  
Toll Free: 800.223.6246  
Telephone: 574.271.5177  
Fax: 574.271.5980

## **Mental Health in the Workplace**

### **What Would You Do?**

#### **Introduction**

Behavioral health issues in the workplace are often very sensitive and perplexing for even the most seasoned HR professionals. In this session, you are presented with three actual workplace situations. You will break into three groups with each group taking one scenario. You will have 15 minutes to discuss your scenario following the questions indicated. A spokesperson from each group will address the room stating your group's decided course of action and reasoning behind it.

#### **Scenario 1**

Scott is 62 years old and has worked in corporate marketing at the same company for 28 years. He has always been focused and a leader in the department. There have never been any issues or concerns about his performance. In the past 3 months Scott has made some minor mistakes – unusual for him. Last week he forgot about an important meeting. Said he had so many things on his plate, that he neglected to note this meeting on his calendar. Today, Scott was late. He had made a wrong turn on the way to work and got lost in an unfamiliar neighborhood. Scott mentioned at lunch that he recently had a physical exam and is in great shape.

As his supervisor, I am worried. Can I say anything to Scott or must I wait for Scott to make a serious error or to develop an obvious problem? What should I do?

### **Questions**

1. What aspects of Scott's situation strike you?
2. What issues do you think could develop?
3. Should Scott's supervisor take action? If not, why not? If so, what steps should he take?

### **Scenario 2**

Maggie is 43 years old. She has worked as an administrative assistant at an insurance company for the past 11 months. Maggie is very good at her job but tends to be moody. Some days she is upbeat, pleasant and a joy to work with. Customers love her. Other times she will fly off the handle for a minor issue or an imagined slight. When Maggie gets into one of her moods, it is impossible to reason with her. We just have to wait for the mood to lift. She has been like this since she started.

We don't want to lose Maggie because she can be a real asset to the company and in our area, good administrative assistants are hard to find. However, other members of the staff are complaining about her and don't want to work with Maggie on her "bad" days. They also feel like they must walk on egg shells not knowing what might trigger a "Maggie Mood." As owner of the company, I have talked with Maggie and asked her if she feels well or if there is a problem we could help her with, but she insists there is nothing at all wrong with *her*. How should I handle this?

### **Questions**

1. What strikes you about Maggie's story?
2. What issues do you see developing?
3. How would you approach Maggie and what would you do?

### **Scenario 3**

Luke is 38 years old. He has been Warehouse and Shipping Manager for an industrial supply house for five years. When Luke took over the warehouse, it had been badly mismanaged and was in disarray. Luke organized the various products under color coded labels and established strict protocols for placing, removing and shipping materials. He has a reputation for running a “tight ship.”

Recently, Luke has been exhibiting some strange behavior. His employees say that when they leave the building at the end of the day, the warehouse is well organized – exactly the way Luke wants it. When they arrive in the morning, boxes of product are spread all over the warehouse. Luke reprimands the employees for sloppy workmanship and for leaving a mess. The employees spend several hours putting away materials and reorganizing the warehouse. This had been going on for a few days when one of the employees hid in the warehouse to see what was happening. He discovered that during the night, Luke himself, drove a forklift truck around the warehouse removing crates of materials and putting them under the wrong labels or leaving them scattered around gangways.

The employee reported his observations to the Plant Manager who spoke with Luke. Luke vehemently denied the allegations. He claims his employees fabricated the story and are out to get him. The Plant Manager reported the situation to Human Resources. What should be done?

#### **Questions**

1. What strikes you about Luke’s story?
2. What issues do you see developing?
3. If you were the HR Manager, what steps would you take?