PO Box 21061, Edgeware, Christchurch 8143, New Zealand
P +64 09 623 2950 E enquiries@raisementalhealth.co.nz
0800 SELFHELP (0800 735 343)

raise

Welcome to Raise

Thank you for accepting our invitation to become an Associate for Raise, formerly EAPworks, and partnering with us in the provision of professional staff services to our RAISE clients and companies. The work of Raise has developed and grown over the years and so a network of selected practitioners has been established to support our quality Employee Assistance Programme to our clients throughout New Zealand.

This manual is the initial guide for experienced professionals who join our network. Please contact us for any clarification and for specific scenarios that you'd like more information on.

About Raise

Raise is a NZ national provider committed to supporting managers and employees to function at their optimum at the individual, team and organizational level. Raise's core services include the following:

- Individual counselling
- Diagnostic and Fit for Work Assessments
- Couples or group counselling
- Critical incident management
- Career transition support
- Financial and career mentoring
- Nutritional support and coaching
- Life coaching
- Facilitated discussions
- Wellbeing checks
- Onsite support
- Brief intervention for AOD
- Onsite counselling support
- Professional supervision

Our services are delivered by experienced, registered practitioners including but not limited to counsellors, psychotherapists, psychologists and clinical psychologists, and career consultants. All of our practitioners have tertiary accreditation, membership to a professional body or appropriate certifications within their field, and personal or company indemnity insurance.

Raise service delivery standards are consistent with the Employee Assistance Professional Association of Australasia (EAPAA) Code of Ethics and Privacy Law.

Raise customers and clients

We provide services that are available to more than 400 organizations, covering a large number of employees and their immediate family members. Raise provides services to a diverse range of public and private sector organizations in New Zealand in varying industries including:

- Health sector
- Aged care sector
- Legal and Professional Services
- Insurance and finance
- Retail
- Education
- Hospitality
- Infrastructure/ Engineering
- Construction
- Manufacturing
- Government agency
- Not for profit

Other Services Provided by Raise

You may be contacted by Raise to discuss providing other important RAISE related services such as:

- Critical Incident Management (using the CIMA methodology).
- RAISE training sessions on a range of topics such as wellbeing, stress management, communication, etc. We will provide you with the training material.
- Specific onsite support
- Manager Assist. This service is offered to team leads and managers to provide support, guidance and direction with challenges pertaining to mental health and wellbeing risk, needs and challenges of their staff.

What we give you as a Raise Associate

In valuing our partnership with you and as part of our professional agreement we offer the following support and resources:

- Open door policy for case discussion and managing complex cases related to workplace issues
- Professional development opportunities
- Regular updates and newsletters
- Access to Raise web-based resources for clients and leaders
- Our case management system- your own practitioner portal
- Timely payment of approved services
- RAISE Brochures (explains how our service works for employees)

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What we ask of you as a Raise Associate

We ask that you align with our values, ethics, process and polices to deliver a best practice service in a professional, friendly and empathic manner.

- Commitment to quality
- Proactive advice seeking; please do call us for queries or for directions regarding cases and administration.
- Keep up to date with us: if you haven't been receiving newsletters, emails, or calls, please let us know.
- Keep us informed of any changes to your availability, contact details and holidays.
- Clinical notes and any information collected due to service provision must be stored **on your own systems**, and those systems must comply with the legal requirements and industry standards for storage and security. We ask that you please retain your Raise client and clinical notes and records for 10 years on your own secure system.

Types of RAISE referrals

Self referral – the client refers themselves.

Formal Manager referrals – from the manager. Where formal feedback or any feedback that identifies an individual is required, <u>we need to obtain informed written consent from the individual before disclosing any information.</u> We will provide the counsellor with a signed consent form. The manager will contact Raise regarding any needed information and Raise will contact the counsellor and then RAISE will provide the information to the manager. This process assures confidentiality is kept and provides safety for the client and counsellor. Do not contact managers directly without prior approval from Raise or unless it is part of your specialized service referral or onsite referral.

Specialist Services – the client may need a manager referral for specialist counselling services or psychologist support and assessment. If a client is enquiring about these services please ask them to contact Raise or check with Raise before offering the client a specialized service.

Professional Principles:

Raise supports these key principals which are paramount in providing best practice for brief intervention counselling and services:

- Competence and Credibility of our staff and contractors and our service delivery processes.
- Confidentiality and privacy within the bounds of the law.
- Neutrality – We are not part of management nor union and we do not advise on HR or legal matters.
- Professional Duty of Care (counsellors can provide safety or care planning and referrals or referral suggestions as appropriate).
- Quality Assurance processes (feedback form, oversight of your processes).
- Accountability/ Adherence to your and our Professional Code of Ethics

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The Process of RAISE counselling interventions

After making the initial appointment request, the employee will attend their initial appointment with you, their Raise Associate. Raise suggests a standard approach to assisting our client, following the process below:

- After accepting the referral from Raise. You should reach out to the client and schedule an appointment. At this time, you can introduce yourself and should email out the **Raise Client Rights and Welcome Letter (our informed consent form).** In certain situations, you can use the form along with a one-page document explaining the service if the form is not suitable (supervision, couples counselling, financial or career mentoring, or onsite services). You can find our form in your practitioner portal under the forms tab. What needs to occur is an explanation of the process, limits of confidentiality, client rights to obtain signed consent, and explain the 24-hour cancellation policy). If you are seeing the client via telehealth, then the client should be informed that they can text or email back that they have read and understood the form and that correspondence will count as a digital signature. If you cannot get a digital signature, then you can read and explain the form to the client and get verbal consent which you should then document on the form. This needs to occur either before the session or at the beginning of the first session. You will keep evidence of this digital or verbal agreement in your client notes. All client notes, correspondence and forms should be kept by you in a secure environment for the appropriate length of time for storage of this type of record according to industry, professional and ethical standards. We ask that you store your client and clinical notes for 10 years.

- At the first meeting with you, clients should be welcomed in a respectful manner. The client should feel that they are in a safe place and feel welcomed and respected when greeted by you and this should continue in all ongoing forms of communication between the client and yourself. There should be time for introductions, and you should identify any cultural needs and respond appropriately to these needs. For example, ensuring that counselling starts and ends in a culturally appropriate manner for the client.

- Then you should explain the process of counselling **(client rights and welcome letter)** and client rights and confidentiality should be explained. There should be an explanation that this is brief counselling. Brief counselling is time limited and is client centric and goal orientated with the aim to help provide clients with tools, strengths, and strategies that help them progress to meet their goals. If the client has not already provided a digital signature, then the client should sign the client rights and confidentiality form at this time. There needs to be some sign of understanding documented (text, email, or physical signature, or verbal consent) before counselling can proceed. This should be saved with your notes in a secure environment according to good practice standards. Clients should be made aware that they have the right to request another Raise associate/practitioner if they do not feel the first session was a good fit and Raise will re-refer them.

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The Process of RAISE counselling interventions

- It is expected that in the first session the following will occur: the Raise Associate will seek to understand the presenting issue and will assess some of the client's history, the client will set goals, and the Raise Associate will do a risk assessment and a mood check if needed. As this is brief counselling you should also be asking about strengths, solutions, and coping. Although you should get a brief overview of the client's history the focus is on the goals and issues the client is facing in the present. The exception to this would be if the referrals team has been contacted for additional sessions regarding a client's goals that require more extensive counselling sessions. Or if this is a referral regarding a specialized service.

- While you are hearing the client's story you will also look for any risks and ask questions and respond to risks as needed. If needed, Raise can provide a Risk Response document for guidance. We do not provide a diagnosis unless it is a requested and approved service. This process is only to aid in assessing and responding to risk and to help the client with stabilization, care and safety planning and referrals if needed. The client will set goals in this session or move toward goal setting but response to immediate or acute risk must take priority.

- The session should end in a culturally appropriate manner if previously agreed.

- Further sessions should include stabilization, care and safety planning if required or commencement of education, skill work, and intervention. Where appropriate there should be assessment of goals and needs and determining the level of intervention that can be provided within the allocated sessions. Further support could include but is not limited to skill work and skill development, identification of helping resources and encouragement to use these supports and resources, provision of appropriate reading materials or other resources (worksheets etc.).

- Proactive re-booking should occur, and you should follow up with clients who agree to engage in counselling. If using online or telehealth methods, please ensure that the mode you are using is secure and confidential. Please communicate how to use this method and send out the appropriate links for the appointment. For an appointment to go ahead the client will need to confirm that they are attending or agree to the appointment time (verbally, or through text or email).

- At the end of each session, you should check in with the client. Example: Asking: "has this been helpful? Is there more information or strategies I can help you with, or other points to discuss that we haven't touched on yet that you would like to discuss in our next session?"

- At the final session, if needed there should be referral suggestions or external referral suggestions if a longer-term intervention need is indicated, and if the client is not able to access additional sessions with Raise. Any safety or care plans should also be finalized if applicable. Please contact Raise for support if needed.

RAISE session length

- The length of each counselling/mentoring or coaching session is to be billed for an hour in total.

- However, the actual session duration can be 50 minutes. Your admin time is covered by the hourly rate of the referral.

- Only enter sessions in one-hour increments, half hour increments will not be accepted.

- Only one hour session per scheduling will be allowed in the system per day. Please do not charge or book counselling/mentoring or coaching sessions for longer than one hour.

- Keep in mind, however, that each client is generally only covered for a total of up to 3 hours (see client referral form for details), so sessions should be structured for maximum effectiveness. If you feel more sessions are needed, please follow our additional session process which is explained below. Do not book sessions if you do not have any hours remaining on your referral and do not book sessions without first accepting the referral.

- The additional session request forms can be found under the forms tab in your practitioner portal with Raise. There is also a form there that explains the process to clients. All additional session requests must be processed through Raise and sent to Raise by you, the Raise Associate.

- If you have a specialist service referral (psychological assessment, critical incident support, facilitated discussion, training etc.) or an onsite referral, you will be able to enter more than one hour for the referral.

RAISE service provision

- Raise provides services to employees and members of organizations that have contracted with Raise to provide EAP services. We can provide individual counselling, and couples or family counselling as well as other services. We do not provide services to children under the age of 13. Children under the age of 16 will need an adult to consent to their service provision. Service provision cannot occur if the child is not willing and engaged in the service. If you are providing services to children, we will need you to provide Raise with a children's worker safety check.

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RAISE Matters Needing Attention and Special Care

1. Difficulty Contacting Clients Or Getting First Appointments:

Raise needs to track referrals and ensure that service needs are met within agreed contractual time frames. Please enter the appointment time for the referral in your practitioner profile. Please also enter any contact attempts in the client contact notes section of the referral.

If you are unable to contact the client, and you have tried at least two or three times using all the client's contact methods and the client has not responded within 2 weeks, then please advise the referral team of this. You will need to **advise the Raise referral team** so we can note your efforts on the database, and we can attempt to contact the client or re-refer if needed.
If the individual gets back in touch, you must contact Raise before beginning sessions. The individual may have lost their eligibility for sessions, or they may have already used their session allocation with another practitioner.
If you can no longer take a referral, then contact Raise and let us know that you are referring the client back to us. You need to inform the referrals team if you can no longer take a referral.

2. Handling Challenging Situations That Arise in RAISE Sessions

The content of most RAISE referrals can be managed within the allotted referral sessions. However, there can be times when there is a referral that is complex and has a higher level of acuity. If you think the client may benefit from additional sessions, then please fill out our additional session request form that is on your practitioner portal. The practitioner should also request additional sessions with Raise if the client has complex goals and needs as soon as possible. Please use the appropriate forms in your practitioner profile under forms and email them to referrals@raisementalhealth.co.nz). Additional sessions are not guaranteed as they need to be approved by the employees' company or the client's membership organization so plan accordingly. You should be working within the number of sessions provided.

As this is brief counselling the practitioner should be preparing the client for the exit session. On the final session with a client, the expectation is that the client should have some strategies, a coping plan, a sense that their goals have been met, or they have a way forward and are able to continue to work on their goals themselves. If needed the client should have a referral plan in place. Before creating a referral plan, please contact Raise to make sure the client cannot receive additional sessions if appropriate.

Where there is a request for additional sessions, please ensure clients are provided with an exit plan in case additional sessions are not approved.

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If at any time you feel that the complexity of the client is outside your knowledge base or practice scope, refer the client back to Raise by contacting the referrals team (referrals@raisementalhealth.co.nz). If the client is abusive, threatening, violent or is unable to maintain sobriety, Raise should be contacted and informed of this situation, and we will work together with you to achieve a safe outcome.

Important principles to remember:

- We always have 2 clients; the employee in the room and the organization which they are part of, and we have a responsibility to both.
- It is important to note that RAISE requires a confidential, professional, and neutral approach, especially when discussing organizational issues and 'alleged workplace caused issues' e.g. allegations of workplace bullying. Remember we are only hearing one perspective on a scenario. We do not offer legal advice or HR advice, nor do we offer advice on an employment dispute.
- RAISE Practitioners must remain neutral.
- RAISE practitioners must never advise or encourage an employee to take any action that puts the company at legal risk.
- Raise does not get involved in disciplinary or industrial matters, **nor take any role in advocacy.**
- Raise asks that you **do not attend** meetings as a support person. If this has been requested, please contact Raise.
- No reports or letters should be provided to a client's company or manager without a release of consent being signed and approval from Raise.
- Raise does not provide mediation or conflict resolution services.

In any of the above cases, please remember that we are there to help and support you. We want to hear about any difficulties, complaints, or complex cases. We would rather hear about a matter from one of our team, than from the individual or the organization.

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Raise and Discrimination

Raise Code of Ethics states a commitment to:

- The belief in the dignity, worth, and sacredness of each individual human being.
- The holistic nature of every person - physical, mental, social, emotional, spiritual.
- Ensuring the freedom and basic rights of individuals regardless of custom, gender, sexual orientation, ethnicity, age, political opinion, financial position, creed, status or ability".
- Providing a service in an environment which is non-threatening, non-coercive, non-judgmental and non-punitive.
- Commitment to the Treaty of Waitangi/ Te Tiriti O Waitangi.

We endeavor to provide clients with choices that are in alignment with their needs.

Raise is pleased to announce it is a member of Equal Employment Opportunities Trust and we wish to advise you of the range of resources available on the website www.eeo.trust.org.nz

RAISE Phone Support

If you have a significant phone session with a client, you are entitled to charge your time. **Let the client know this has been part of their counselling time and make them aware of that at the beginning of their phone call,** please provide informed consent regarding this issue at the beginning of the call.

Providing Feedback and needed Information to Raise:

Pro-actively manage client feedback; let us know ASAP of any significant feedback about Raise that we would need to manage.

Pro-actively follow up and provide timely feedback to Raise. Pro-actively enter and submit your sessions after you have completed the session or completed the service provision.

If you're unable to respond to a request from an existing Raise client or for a service requested by us, please let us know **ASAP through email or a phone call** so Raise can respond quickly to the client and to the organization and provide alternate service arrangements.

Please alert Raise regarding any risk to a client or organization and keep in mind confidentiality requirements when speaking to an organization at an onsite.

Quality Service

Raise is committed to providing a quality service to individuals and our client organizations.

How you can help meet Raise Quality and Continuous Improvement Standards

- Maintain competent practice, through ongoing registration and professional development.
- Keep confidentiality according to legal requirements and obtain informed consent at the start of service provision and use the release of consent form as needed and follow Raise processes and procedures.
- Keep your contact details and practitioner profile up to date as well as your APC and indemnity insurance.
- Ensure your client has signed or agreed to the client rights and welcome form (informed consent) and has full understanding and fully consented to the counselling process or service provision.
- Provide Raise with suggestions for improvement and identify risks where you see them.
- Follow Raise process and procedures

Criteria: Selection of Associates

The criteria for selection of Raise Associates:

- Qualifications, certifications, registration, and experience/knowledge of discipline (e.g., tertiary qualified, current registration with relevant board or membership body, appropriate certifications (coaching, financial advisor, CIMA) experience in related field of psychology, social work, counselling).
- 5 years plus experience is preferred, we have a minimum of three years' experience required to be a Raise associate/contractor providing clinical or mental health services.
- Professional and ethical practice (e.g., adherence to confidentiality, secure storage of records, lack of serious complaints, lack of ethical/professional breaches with the relevant registration boards)
- Adherence to providing a safe and comfortable counselling room(s) (e.g., good condition, evacuation procedures, Health & Safety awareness)
- Ability to respond in a timely way (e.g., return calls, administration, and forms, follow up on supervised cases, adequate appointment hours and availability),
- Performance (e.g., evidence of positive feedback, satisfactory interventions observed during case discussion, repeat business, referees)

The criteria for removing a RAISE Associate from the Raise network

- Failure to perform satisfactorily despite reasonable assistance and management action.
  - This will be monitored over time, with the opportunity to improve with feedback, unless there has been a significant complaint or breach of process.
- Failure to maintain registration and indemnity insurance.
- Loss or lack of supply and responsiveness.
- Continued negative feedback or complaints provided by our clients in either written or verbal format that cannot be resolved or has not improved.
- Actions that result in impacts to the Raise business, such as reduced value for money, change in focus of supplier's business, supplier is downsizing or relocating.
- Ethical or quality breach (depending on circumstances, may invoke immediate separation) relating to Raise' service or during service to other customers, and may include:
  - Serious environmental or H&S breach
  - Illegal practices
  - Practices or behaviours which contravene the Raise, and EAPAA guidelines – such as inappropriate behaviours bringing the profession into disrepute.

RAISE administration

Efficient RAISE administration enables swifter payments and on-time reporting for our RAISE customers.
When a client contacts Raise for a referral, our administration team records the client's name and contact details in our database, and gathers non-identifying statistical information for reporting purposes.

Raise then refers the client to a practitioner. The practitioner is contacted, usually by phone, text or email, to check their availability and that the presenting concern is within the practitioner's field of expertise. When the practitioner replies in the affirmative, we then email the referral information to the practitioner who then calls the client and sets up an appointment. Please send out your own scheduling reminders.

The practitioner updates the Raise portal that contact has been made and inputs the date and time of the first appointment as soon as the appointment is made.

If a client or a client company contacts you directly for support, please ask them to place a referral to Raise through our website, the app or by phoning 0800 735-343. Alternatively, with the client's consent please raise a referral on their behalf through our website, the app or by phoning one of the team on 0800 735 343.

The Raise 0800 number: Please ensure that your Raise clients have the 0800 SELFHELP number should they wish to contact RAISE down the track or access at a later time. This provides an extra level of assurance that we can respond in a timely manner.

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Managing RAISE entitlements and ensuring appropriate use of extensions to RAISE entitlements

- Where an individual would benefit from receiving additional sessions, please fill out a 'Request for Additional Sessions Form' (on our website) with the explicit permission of the client. Please complete all the details on the form and send to referrals@raisementalhealth.co.nz Our team will request approval from the organization and advise you in the earliest time possible. Always go through Raise do not contact the organization.
- Do not provide extra sessions until the sessions have been allocated (even if a client mentions they have an extension - always check with us).Call Raise to discuss any cases which may require additional or different interventions. Do not schedule or guarantee services without a referral and session allocation.
- Managing client's perceptions and misperceptions of the role of RAISE and entitlements is part of your role as a quality RAISE associate. Please check with the referral team first, before providing any information regarding Raise entitlements. We are happy to assist you in responding to requests or to clarify RAISE's role for clients at any time. Just ask if you need help.
- Most of our client organizations provide a yearly entitlement for Raise services. Please check with Raise to confirm when a client's new entitlement will begin. Unused hours from the previous year's entitlement cannot be 'rolled' over into the new year, even if it is the same presenting concern. A referral older than a year cannot be used, a new referral must be requested.
- Initiate referral or referral suggestions beyond RAISE **early** if a client needs longer-term support. The nature of the support is brief intervention, any long-term support cannot be funded. If further sessions are needed to arrange an exit plan, or the client is currently high risk, please enquire with Raise about additional sessions. There should be an exit plan in place when requesting additional sessions as additional sessions are not guaranteed.
- If a client is out of session allocations with Raise, you can decide to see the client privately if both you and the client agree. <u>Ensure that the client is not entitled to anymore sessions with Raise first.</u> You will need to re-sign with the client and go through the informed consent process again with the client under <u>your own company</u> name, processes, and documents. Make sure this process is very clear to the client and they have agreed and understood. When the client can receive Raise allocations again then end your private agreement and go through the Raise process again. If you have any questions regarding this, please contact Raise.

Invoicing

All Raise services are processed automatically through our portal. Invoicing is a two-step process. Sessions are entered in the referral and then submitted through the services tab. Once sessions have been entered and submitted, a buyer created invoice is automatically generated. Sessions can only be entered in a one-hour format for most services. Please enter sessions promptly after seeing the client. This allows us to know the client has been seen and ensures that you are paid on time. Payment of sessions is monthly. **We cannot assure payment if sessions are submitted later than three months after the session occurs.**

Expenses only relate to specialised service. All expenses will be manually approved by Raise staff prior to payment and require receipts.

Please ensure that all sessions are entered and submitted by the 28th or the end of each month for data entry and invoicing.

Cancellations

If a client formally books a time to see you but fails to show or cancels within 24 hours you are able to charge a late cancellation fee of one hour of the client's time. This will count as one of the clients' sessions. This needs to be explained at the first client session. It is up to your discretion when you use this policy, there may be times where you will not choose to use it due to a client's illness, or other unanticipated circumstances that may have affected the client.

Call or email us if your circumstances or availability change for any reason.

RAISE Forms you will become familiar with (using the website or hard copy)

- Client Rights and Welcome letter (Confidentiality form)
- Client Release of information form
- Request for Additional Sessions RAISE Form or email template
- Raise Client Evaluation form or website feedback link

Appropriate liaison with the workplace or other practitioners

There *may* be times where, in the interests of the client, you may need to liaise with a third party, e.g. someone at the workplace, such as a supervisor or HR person or with other practitioners such as a GP or psychiatrist. In these circumstances, please discuss this with Raise prior to providing any information or entering any discussion. The individual's informed written consent must be obtained before releasing or discussing any of the individual's information. This consent form can be requested from Raise and allows for the client to specify the nature of and any limits to the authority. This form must be signed by you and the client and kept with the client's notes in your secure system.

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There may be appropriate situations where the employee requests or you would recommend a liaison with the organization (HR or manager) to better assist a client to manage their concerns at work. This may be in context of a workplace trauma or conflict etc. Where this has been requested, please call Raise to discuss these needs before proceeding and the Raise consent form must be signed before contact can occur with the client's place of employment.

Please feel free to contact the Raise office for ongoing admin enquiries, advice, feedback and general enquiries. ....We are just a phone call or email away.

We want to make ourselves available for any needs and for your support as required.

The Raise phone number is: 0800 SELFHELP / 0800 735 343

Our Web-site is: www.raisementalhealth.co.nz Our Email: referrals@raisementalhealth.co.nz

Accounts queries: accounts@raisementalhealth.co.nz

We are here to support you!