

# HOW TO AUDIT YOUR CURRENT EMPLOYEE ASSISTANCE PROGRAM (EAP)



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## Purpose of an EAP Audit

An EAP audit helps assess the effectiveness, utilization, accessibility, and return on investment (ROI) of your Employee Assistance Program. Regular audits ensure your EAP aligns with employee needs and organizational goals.

## Step 1: Define Audit Objectives

- Evaluate program effectiveness
- Assess employee awareness and utilization
- Ensure compliance with privacy/confidentiality laws
- Measure satisfaction and ROI
- Identify opportunities for improvement

Utilize sample survey (listed at the back of this document) for awareness. Check engagement.

## Step 2: Review Program Documentation

- EAP policies and procedures
- Contracts and service-level agreements with external providers
- Training and communication materials
- Marketing and promotional efforts

## Step 3: Analyze Utilization Data

- Number of employees accessing services
- Frequency and type of issues addressed (e.g., mental health, legal, financial)
- Session completion rates
- Trends over time
- Is there a change in utilization of corresponding mental health benefits?

How is this information gained and distributed? What reporting options are there? What metrics are used to measure utilization and how is utilization defined? Customization in reporting?

## Step 4: Assess Provider Performance

- Response time for initial contact
- Accessibility (24/7 hotline, online portal, local and in-person availability)
- Credentials and qualifications of counselors
- Continuity of care, can workers speak with and/or meet with the same counselor?
- Confidentiality and data protection practices
- Cultural competency and language support

## Step 5: Survey Employees and Managers

- Awareness of EAP services
- Ease of access and use
- Perceived confidentiality and trust
- Satisfaction with support received
- Suggestions for improvements

## Step 6: Evaluate Communication Strategies

- Frequency and clarity of program communications
- Visibility in onboarding and orientation
- Use of flyers, posters, emails, texts, and intranet updates
- Participation in wellness events and workshops

## Step 7: Compare Against Benchmarks and Best Practices

- Industry benchmarks for utilization rates (typically 3%-10%)
- Session limits and service variety
- Inclusion of dependents, family members, and those who live in the home
- Onsite or virtual training availability

## Step 8: Assess ROI and Business Impact

- Impact on absenteeism and presenteeism
- Employee retention and engagement
- Impact on health care claims (there may be an increase in utilization) or disability leave
- Correlation with performance or productivity metrics

Safety metrics. DART rate and incident rates. Pre to post EAP. Did the EAP move the needle?

## Step 9: Identify Gaps and Make Recommendations

- Underutilization causes (e.g., lack of awareness, stigma)
- Needed services not currently provided
- Opportunities to improve access, education, or manager involvement
- Consider expanding services or switching vendors if necessary

## Step 10: Document and Report Findings

- Summarize strengths, weaknesses, and opportunities
- Prioritize actionable recommendations
- Share results with leadership and HR
- Establish follow-up timelines for implementation

## CONCLUSION

### Tips for a Successful EAP Audit:

Maintain strict confidentiality throughout - Include both qualitative (survey/interview) and quantitative (data analysis) methods - Involve stakeholders from HR, leadership, and employee focus groups - Repeat the audit annually.

### Conclusion

Auditing your EAP ensures it continues to meet evolving employee needs and supports a healthy workplace culture. A well-managed EAP can be a powerful tool for improving organizational well-being and productivity.



# SAMPLE QUESTIONS FOR EMPLOYEE SURVEY

## 1: Awareness & Communication

- Were you aware that our company offers an Employee Assistance Program (EAP)?
  - Yes
  - No
- How have you heard about the EAP? (Check all that apply)
  - HR or Benefits communication
  - Company email or newsletter
  - Workplace posters/flyers
  - Orientation or onboarding
  - Manager or supervisor
  - Word of mouth
  - I have not heard about it
- How clearly is the EAP communicated within the organization?
  - Very clearly
  - Somewhat clearly
  - Not clearly at all
  - I have never seen communication about it

# SAMPLE QUESTIONS FOR EMPLOYEE SURVEY

## Section 2: Access & Usability

- Do you understand how to access EAP services?
  - Yes
  - Somewhat
  - No
- Have you ever attempted to use the EAP?
  - Yes – successfully
  - Yes – but I had difficulties accessing it
  - No – I haven't needed it
  - No – I didn't know how to use it
- If you used the EAP, how would you rate your experience?
  - Excellent
  - Good
  - Fair
  - Poor
  - Not applicable
- Were the services you received:
  - Helpful and appropriate
  - Somewhat helpful
  - Not helpful
  - Not applicable

## SAMPLE QUESTIONS FOR EMPLOYEE SURVEY

### Section 3: Perceived Value & Trust

- Do you believe the EAP is a valuable benefit offered by the company?
  - Yes
  - No
  - Unsure
- How likely are you to recommend the EAP to a coworker?
  - Very likely
  - Somewhat likely
  - Unlikely
  - Not at all
- Do you trust that EAP usage is confidential and private?
  - Yes
  - No
  - Not sure
- Do you feel that leadership supports the use of the EAP?
  - Yes
  - No
  - Not sure

# SAMPLE QUESTIONS FOR EMPLOYEE SURVEY

## Section 4: Service Gaps & Suggestions

- Which services do you think should be included or improved in the EAP? (Check all that apply)
  - Mental health support (depression, anxiety, burnout)
  - Financial counseling or debt management
  - Legal consultations
  - Family or relationship counseling
  - Childcare/eldercare resources
  - Substance abuse counseling
  - Grief and trauma support
  - Crisis hotline or suicide prevention
  - Stress management/mindfulness resources
  - Other: \_\_\_\_\_
- What improvements would make you more likely to use the EAP? (Check all that apply)
  - More promotion and communication
  - Easier access (fewer steps, online portal)
  - Mobile app or text-based services
  - More assurance about privacy
  - Leadership encouragement
  - Peer testimonials
  - More relevant services
  - Other: \_\_\_\_\_

Do you have suggestions for improving the EAP overall?  
[Open-ended]



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