How to respond when a direct report has anxiety, depression, or other mental health issues

It’s a big part of your job to care about your direct reports’ well-being and careers. But what about when a direct report’s work performance unravels due to a struggle with depression, anxiety, addiction, or another mental health condition?

You may want to help, but you’re not a trained mental health expert, and it’s also your responsibility to do right by your organization. The person’s work still needs to get done, and, oh yeah, there’s the rest of the team to worry about.

There’s only one sure thing in this tricky situation — as a manager, you are not alone:

- While many managers — roughly 80 percent, according to one study — believe it is their job to intervene when a direct report experiences psychological distress, the vast majority of those managers report not having the appropriate training to do so.
- About 18 percent of workers in the US report having a mental health condition in any given month.
- Depression is the leading cause of disability worldwide (greater than accidents or physical conditions).

To respond in a way that’s best for the person, your team, your organization, and yourself, try these tips.

1. Present HR with the situation to determine your and your organization’s obligations.

Maybe you want to protect the person’s privacy. Or maybe you’re not even sure that whatever is impacting the person is a mental health problem — perhaps it’s just a phase. Plus, the work’s not slipping that much, so maybe HR doesn’t need to be involved, right? Wrong. This is one of those management situations where it’s better to overreact and apologize later than to sit back and do nothing.

If the employee does have a mental health issue, you and your organization have certain obligations with potential legal implications, especially if the person has to go on leave or eventually be terminated. Plus, mental health conditions tend to evolve over time, so even if you only suspect a problem, protect the person and yourself by informing your manager and going to HR immediately and following their guidance as the situation unfolds.

In some cases, you might not need to divulge your direct report’s identity but can talk more broadly about the situation. HR may advise you to start documenting certain behaviors (like absences, missed performance targets, and your responses) or to refer the person to mental
health experts covered by company-offered benefits. In others, HR will be required to intervene, like if the person has to go on disability leave, has expressed violent thoughts, or failed to show up for work and isn’t responding to messages.

**Important note:** If you believe there’s an immediate threat of the person hurting themselves or others, immediately call the suicide prevention lifeline (1-800-273-8255 in the US) or emergency services (911 in the US).

2. **Show compassion toward the person — but don’t assume the role of therapist.**

When a team member musters the courage to share that he missed those two days of work last week because he had a crippling anxiety attack, you understandably might want to help him through that challenge just as you did last month’s tricky project. But you’re a manager, not a mental health expert. Worse, if the person feels comfortable confiding in you, he or she might grow reliant on you and begin to think that expert help isn’t necessary.

Instead, be supportive, draw appropriate boundaries, and point the person toward professional help:

> “Javier, I’m so glad you’ve told me this, and I’ll do what I can to support you with scheduling and your workload. At the same time, I’m not personally trained to help you. That’s why I think we should contact a mental health expert covered by our employee benefits.”

And if you personally have dealt with a situation similar to what your direct report is going through, be careful if you choose to share your own experience. While our research suggests that sharing common experiences can be a way to build trust with struggling direct reports, it can also be alienating for the direct report to hear, since he or she won’t cope the same way you did and won’t necessarily respond to the same things that helped you. So instead of, “I know just how you feel — I was so depressed last month,” try something like, “I want you to know you’re not alone — I’ve struggled with depression, too. That’s why I suggest you seek professional help.”

3. **Persuade the person to seek help from HR and/or mental health experts covered by your company’s benefits.**

Be ready for the person to resist reaching out for professional help due to any number of factors, including believing he or she can handle the situation without help, lacking the will or energy to proactively reach out, being embarrassed, or fearing what will happen if the condition is documented by your company.

One of the most valuable things you can do is to show the person how beneficial getting professional help can be. Some strategies to encourage the person include:
Advertising the success of professional support: For example, “Javier, I was reading a report [from the Workplace Mental Health Center] that something like 80 percent of people receiving treatment for mental health conditions do end up feeling better at work.”

Seeking advice and resources from HR: You may be able to do this without disclosing the person’s identity. For example, you could approach HR by saying, “An employee has been struggling with alcohol abuse and possibly addiction. He has been reluctant to come to HR, despite my urging. Do you have resources and advice I can share with this person?” Sharing the details you learn might quell a concern the person has. For example, maybe you learn about your organization’s confidentiality policy or employee assistance program, or that the person’s condition is covered by the US Family and Medical Leave Act.

Trying again if the person initially declines help: Even those with major depression have an occasional spark of resolution. With multiple attempts, you might just catch the person on a day when he or she is a bit more receptive. Or you might offer to call an employee assistance program counselor with the person to support him or her through that first conversation. If your persistence doesn’t pay off or you see the situation worsen, it’s time to seek additional support from HR.

4. With HR and your direct report, determine what, if any, time off or accommodations the person needs.

It’s extremely important to consult HR before making any commitment to the person for time off or other accommodations. There may be specific things the person is entitled to according to company policy or protection laws, but your company isn’t required to make an accommodation that imposes “undue hardship” on your organization. Once you make an accommodation commitment, you’re legally obligated to see it through.

Here are just a few possible accommodations:

- **Granting temporary or extended leave:** HR should drive this discussion, since many conditions are covered by law and/or policy. But even if the person’s situation falls in a gray area, HR can help determine a reasonable duration for personal leave.
- **Modifying the person’s schedule and/or work environment:** Options include more or longer breaks, fewer customer-facing interactions, work-from-home arrangements, or flex time (for example, if the person needs to make frequent treatment appointments).
• **Establishing an appropriate level of contact regarding work:** Should you continue regular contact with the person, reduce contact, or have no contact? Imagine a top team member going on leave one month before a critical project is due — with no chance to transition the work. It may be inappropriate or impossible to maintain contact with the person, but you may be able to set ground rules for contact that lets you seek pertinent work information without too much intrusion.

5. **Factor in privacy and transparency when explaining the situation to your team.**

Your team will notice if a team member is suddenly absent or not meeting deadlines. They need to know what’s changing — and to hear it from you directly rather than via a casual team email or hallway chatter.

At the same time, your direct report and/or HR may want most details to be kept confidential. If appropriate, ask the person what level of privacy he or she wants regarding what team members know: Complete privacy with nobody reaching out? Okay for concerned team members to check in? Your addressing the team or he or she addressing the team directly? Knowing this will help you balance the person’s wishes with letting the team understand what’s going on.

For example, in a situation where you can’t share details of the person’s condition, you might still provide some clarity by telling the team something like:

“You’ve probably noticed that Javier has been out the last several days. That’s because he has a personal issue he’s dealing with, and he’s likely to be out for the next couple of weeks, maybe longer. For now, he’s asked that you don’t reach out to him directly. Instead, please come to me if you have questions or want to share your well-wishes, which I will share when I can. Because I’m committed to confidentiality for Javier — just like I am for everyone on the team — I am unable to share more details at this time”

6. **Figure out how you and your team will pick up any extra work.**

How you approach adjusting your team’s workload depends on the nature of your work and deadlines. Work with your manager and team to determine whether you should:

• **Redistribute and/or rotate the extra tasks.** Consider team members’ interests and bandwidth when delegating meatier tasks. And think about whether spreading tasks among several team members or rotating them for short durations might ease the burden of extra work.

• **Reprioritize assignments.** Are there secondary projects that can be put on hold to focus on meeting your team’s top goals? Or can you extend the timeline of certain projects to keep your team’s pace sustainable?
• **Add contractor hours or more hours for team members (if they’re hourly).**
  Given the situation, your organization may be open to adjusting your budget to get the work done.

• **Ask other teams for help.** A peer manager might be open to asking his or her team to pitch in to help cover for your ailing team member. Or, you could ask the other team’s manager to hold off requesting work from your team while you are shorthanded.

7. **Adjust your management style depending on your team’s response to their changing work dynamic.**

Your team might react to the team member’s absence and having extra work by rallying behind their teammate, being skeptical or resentful, or a mix of these or other emotions. If you offer nothing more than a plea to work harder to power through, you’re setting the stage for resentment.

Instead:

- **Proactively recognize and support team members when they pick up the slack.** For example, “I know you’ve been working extra hours to take care of Javier’s clients. I appreciate the extraordinary effort and your dedication to our team. Let’s check in on how it’s going in our next 1-on-1. I want to see whether the extra load is sustainable or whether we should explore redistributing some clients.”

- **Double down on team communication and check-ins.** You may be your team’s only conduit of information about the person and workload adjustments. Frequent updates can be reassuring, even if you don’t have much to share (e.g., “I don’t have new information about Javier — it’s probably best to expect that he will still be out a few more weeks”). And be sure you’re dedicating time in team meetings and individual 1-on-1s to proactively ask about work progress and well-being. Remaining team members might become reluctant to share problems, assuming you and the team have enough to deal with already.

- **Stop any gossip.** Your team is likely missing the details about what’s going on with the person. That, plus the social stigma around mental health conditions, may lead to gossip. You might remind the team of the importance of discretion: “I know it’s frustrating not to have details, but Javier’s situation is a private one. We all need to respect that confidentiality.” Or you may need to be more direct and tell direct reports that their gossip is unacceptable.

- **Notify HR and your boss of any drop-off in team performance.** As cold and uncomfortable as it sounds, your job is to get the work done to benefit your organization. If you’re truly struggling to get by during a team member’s absence, you, HR, and your manager will need to discuss whether accommodations for the person are putting undue hardship on your company and further steps, like hiring a replacement, need to be considered.
8. Assess whether your work environment contributed to the situation — and, if so, do what you can to improve it.

According to a 2017 Ipsos survey, of the two-thirds of Americans experiencing mental health symptoms in the past year, 28 percent claimed symptoms were workplace-related. Be especially attuned to:

- **Workload-related stress.** Long hours, night shifts, high-pressure situations, unrelenting pace, emotionally draining work (like medical or social work) — if these are grinding down your direct reports, consider opening a conversation with individuals or the whole team about whether it might help to adjust duties or set a work/life boundary. For more, see Are your direct reports on the road to burnout? Some signs they may be and ways to prevent it.

- **Conflicts or poor working relationships.** Start by checking in about your direct reports’ working relationships at their next 1-on-1s. If things are less rosy, you’ll need to determine if and how to get involved — for more, see Diagnosing conflicts between direct reports: Should you act? And if you uncover bullying and/or harassment, report it to HR.

- **Company culture.** Does your team go out drinking every night after work? Is there an expectation that employees are checking their phone at all hours of the night? Are there shift hours that may prompt people to use sleep aids and stimulants? Your organization’s environment could be triggering addiction-prone employees. Look for ways you can change your team’s culture — for example, booze-less team-bonding options, email off-hours, or shift schedules that rotate less frequently so people can establish better sleep routines. If you feel powerless to make these kinds of changes, see HR for relevant resources.


You may be thinking that your direct report is the one really suffering. But don’t minimize your own burdens — the extra hours trying to take on part of the person’s load, the emotional fatigue and worry for the person and your team, even second-guessing whether there was something you could have done sooner to help. Now’s the time to be sure that you’re managing your own workload, not letting work stress spill over into your personal life. Make sure that you have plenty of support from HR and friends outside your organization or outside work if you need to talk about the situation (just be careful not to divulge anything confidential to friends).

In This Week’s Newsletter
Coach’s corner: 3 ways to boost your direct reports’ engagement with every assignment

Topic: Delegating
To get your team’s best effort, give them the freedom to solve problems. FranklinCovey leadership coach Maria “Sully” Sullivan explains how.

Ask a direct report 3 new questions in this week’s 1-on-1
Topic: 1-on-1s
Routines can easily lapse into ruts, especially when you’re overbusy. Take a minute to research and ask a few new, thoughtful questions so that your regular check-ins stay fresh and meaningful.