EAP Utilization Report Guide

This report guide outlines how each detail line item presents information so you are positioned to understand the utilization of your employee population. If you have any questions, please feel free to reach out to your Account Executive for further support.

COVER SHEET

Employee Headcount – This line item reports that employee headcount as reported as an average of the time period provided based on invoices.

Reporting Period –This line item reports the beginning and ending date parameters of the report.

UTILIZATION DEFINITIONS

This page explains the definitions that we utilize while calculating the utilization for the time period given, along with our utilization formula.

TOTAL USAGE

Personalized Usage

Each line item has a **#, %** and **YTD** column. The **#** column represents the number of units being counted for calculation of the Total Personalized Presentation (Utilization Rate). The **%** column represents the percentage of the whole (100.0%) that each line item represents. This is not the utilization rate. This should total 100.0%, however, rounding issues may not allow for a 100.0%. The **YTD** (Year to Date) column presents the total number of items referenced above for the Account's year.

The items captured within this table are related to services provided directly to a member.

Face to Face Consultation Referral – This line item reports the count of EAP authorizations granted to members within the reporting period for authorizations that were facilitated as Face to Face Sessions. This counts the authorization as 1. This does not count the number of sessions authorized or utilized.

Telephonic Counseling – This line item reports the count of EAP authorizations granted to members within the reporting period for authorizations that were facilitated telephonically by internal clinical staff. This counts the authorization as 1. It does not count the number of sessions authorized or utilized.

Clinical Assessment – This line item reports the count of In Depth Clinical Assessments that are completed by internal clinical staff on behalf of a member within the reporting period. This is a special in depth assessment that is done at the counselor's discretion and may involve a substance abuse assessment, domestic violence assessment, or an overall in depth mental heath assessment. This line item also reports the count of members who called for a telephonic consultation, meaning they called and needed to speak to a counselor immediately for a "quick mini session" or full one hour telephonic counseling session if utilized.

WorkLife – This line item reports the count of WorkLife authorizations created within the reporting period.

Financial – This line item reports the count of authorizations created within the reporting period when the Member was referred to a Financial Specialist.

Legal – This line item reports the count of authorizations created within the reporting period when the Member was referred to a Legal Specialist.

Member Inquiries – This line item reports the number of employees that simply called in for information or questions about the benefits.

General Information & Referral – This line item reports the count of members that called within the reporting period when the member was provided Community Resource Information.

Benefit Integration – This line item reports the count of Service Intake Event(s) created within the reporting period when the member was referred to an outside vendor / partner.

Totals – This line item presents the total for the above referenced items.

Annualized Personalized Presentation – This line item presents the calculated annualized utilization rate for the above referenced items. The calculation is as follows: (total number of services delivered as noted in the # field above) / the number of days in the reporting period * 365 / number of employees.

Organizational Usage

Each line item has an Event Count, Participant, Length and YTD (Year to Date), and Event Total column. The **Event Count** column represents the number of units being counted for calculation of the Total Organizational Presentation (Utilization Rate). The **Participant** column represents the members / account representatives attending the events. Please note that the Management Consultation line item has the participant area grayed out as it is not applicable, as it is typically only one person calling in for a management consultation. The **Length** column represents the amount of time for the events. Time is in hours (is it)? Please note that the Critical Incident Consultation has the participants grayed out as well, as it is typically only one person calling in for a CI consultation. The **YTD Event Total** column presents the total number of items for the year.

Critical Incident Consultation –This line item reports the count of authorizations created within the reporting period when the authorization indicates the CISD is a telephonic consult only. Participant and Length are blanked out as not applicable to this line item.

Critical Incident On-Site Services – Event Count – This line item reports the count of onsite CISDs within the reporting period. Participant Count – This line item reports the total number of participants that attended on-site services. Length – This line item reports the total time a service provider was on-site.

Management Consultation – This line item reports the count of Management Consult Events that are created within the reporting period. Participant and Length are blanked out as not applicable to this line item.

Training / Seminar – Event Count - This line item reports the count of trainings / seminars that were completed within the reporting period. Standard Trainings, Compliance Trainings and Webinars are counted in this line item. Participant Count – This line item reports the total number of participants attending / participating in these sessions. Length – This line item reports the total time these service items lasted.

Professional Development / Coaching – Event Count - This line item reports the count of authorizations that were finished within the reporting period. Participant Count – This line item reports the total number of participants attending / participating in these sessions. Length – This line item reports the total time these service items lasted.

Health Fairs – Event Count - This line item reports the count of health fairs that we attended within the reporting period. Participant Count – This line item reports the number of participants attending these sessions. Length – This line item reports the total time these services lasted.

Company Group Meetings – This line item reports the count of company group meetings that were attended face to face with an account representative, within the reporting period. This counts each event as 1. Participant Count – This line item reports the number of participants attending these sessions. Length – This line item reports the total time these services lasted.

Program Orientation / Supervisor Training – Event Count - This line item reports the count of orientation and supervisor trainings that were closed within the reporting period. Participant Count – This line item reports the number of participants attending these sessions. Length – This line item reports the total time these services lasted.

Web Hits – This line item reports the number of employees that logged into the website within the reporting period. This does not count the number of page hits, but each individual unique login.

Totals – This line item presents the total for the above referenced items.

Annualized Account Presentation – This line item presents the calculated utilization rate for the above referenced items. The calculation is as follows:

> **Annualized Account Presentation** = (total number of services delivered as noted in the # field above*) / the number of days in the reporting period * 365 / number of employees
>
> * The following items have the # field values as part of the calculation: Critical Incident Consultations, Management Consultations, and Web Hits. The remaining line items have the Participants field values as part of the calculation: Training / Seminars, Professional Development / Coaching, Health Fairs, Company Group Meetings, Critical Incident On-Site Services, and Program Orientation / Supervisor Training.

<u>Annualized Presentation Rate</u>

Annualized Presentation Rate = Annualized Personalized Presentation + Annualized Account Presentation.

DIVISION REPORTING (only for accounts with divisions)

This page reports one line item per Division associated with Account.

REFERRAL SOURCE

Referral Source – This page reflects the answer to the question, “How did you hear about the EAP?” This information is collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc.

MEMBER DEMOGRAPHIC INFORMATION

This page is comprised of five (5) separate reports (tables). Each table contains a # column. The **#** column represents the number of units being counted. Each table has a Total line item. This line item presents the total of all the values contained within the # column within the report (table).

Employee Work Status – This table reports the count of the member(s)' job category. This information is collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc…

Age – This table reports the count of the member(s)' age. This information is collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc…

Gender – This table reports the count of the member(s)' gender. This information is collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc…

Union Status – This table reports the count of the member's union affiliation, if we are required to ask. This information is collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc…

Employee Dependant Status – This table reports the member's association to the employee. This information is collected when a new member record is created.

GEOGRAPHIC BREAKDOWN

This page reports the location (State) that the member gave during the intake process. This page will only be included for accounts in multiple states.

PRIMARY PRESENTING ISSUE

These tables present the primary presenting issue as described by the member. This information is -collected each time the member requests a new service, e.g. new EAP authorization, new Legal Referral, new WorkLife Case, etc.

PRIMARY ASSESSED ISSUE

These tables present the primary assessed issue as reported by the clinician when the counseling sessions have ended. Many times the issue being reported by the member is not the primary issue as determined by the clinician.

FACE TO FACE CLOSED CASES & REFERRALS

The data represented on this page finds its basis from "closed" face to face authorizations and related events. An authorization is deemed "closed" for the purposes of this report when there is an associated Claim.

Statistics – This table reports the Total number of Closed Authorizations and the Average Number of Sessions used when the Member authorizations (both self elect and Management Referral authorizations) are closed within the reporting period. Total Closed Authorization = Count of the number of Authorizations that have been closed within the reporting period. Average Number of Used Sessions = Total number of completed sessions / total number of authorizations.

Closed Sessions – This table reports a count of the number of authorizations that have been closed within the reporting period for each of the listed categories.

> **Face to Face Consultation Referral** - This line item reports the number of closed authorizations that were self referrals for face to face counseling.
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> **Management Referral – Informal** – This line item reports the number of closed authorizations that were informal management referrals for face to face counseling.
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> **Management Referral – Formal** - This line item reports the number of closed authorizations that were formal management referrals for face to face counseling.
>
> **Management Referral – Mandatory** - This line item reports the number of closed authorizations that were mandatory management referrals for face to face counseling.
>
> **Total** – This line item is the sum of all rows and the percentage of the whole that the line item represents.
>
> **Resolution Statistics** – This table reports the member's outcome of each clinical authorization.
>
> **Resolved within EAP** – This line item reports the number of members whose authorization was considered by the provider to be Resolved within the EAP. This does not include work/life, legal/financial, or telephonic counseling resolution and is purely based on the provider's assessment following the face-to-face sessions.
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> **Client Referred** – This line item reports the number of members who were referred by the provider into the table entitled Referrals Provided.
>
> **Client Withdrew –** This line item reports the number of members who withdrew from counseling.

Referral – This table reports where the member was referred, after the counseling sessions were finished.

Authorization Severity – This table reports the risk rating assigned to face to face authorizations at the time of intake.

Referrals Provided – This table reports more in depth referral recommendations provided to the member by the provider.

WEB CONTENT ACCESS

The data represented on this page presents the number of website logins and the categories that were visited during those web sessions.

Topic Analysis – This table reports the total categories visited once each individual member was logged into the website.

Total Website Pages Visited – This table reports the total number of web pages visited by all members in the reporting period.

MANAGEMENT CONSULTATIONS & REFERRALS

This page shows the management interaction during the reporting period.

Informal Referrals – This table populates the count of the Referral Reasons associated with the Management Referral Event when the Type of Referral is Informal and the event is created within the reporting period.

Mandatory Referrals – This table populates the count of the Referral Reasons associated with the Management Referral Event when the Type of Referral is Mandatory and the event is created within the reporting period.

Formal Referrals – This table populates the count of the Referral Reasons associated with the Management Referral Event when the Type of Referral is Formal and the event is created within the reporting period.

Consult Type – This table reports the count of the Referral Reasons associated with the Management Consultation within the reporting period.

WORKLIFE SERVICES SUMMARY (only for accounts with Telephonic WorkLife)

This table represents a breakdown of WorkLife services.

WORKLIFE PROVIDER CONSULTATIONS (only for accounts with Telephonic WorkLife)

This table and graph represent the difference between the total number of calls that were made for each WorkLife request and the actual number of providers that met the member requirements for expertise and availability that were relayed back to the member.

TRAINING OVERVIEW

This page provides an overview of training services that have been received either on site or via webinar when the event was performed within the reporting period. The Participants and Hours columns are totaled.

Date – This column displays the scheduled start date of the training event.

Name of Seminar – This column displays the name of the training seminar. Seminars that are delivered via webinar have "Webinar" in the Seminar Name.

Account / Division – This column displays the division the training is delivered to.

Location – This column displays the location where the training was held. Webinar trainings have this column unpopulated.

Participants – This column displays the number of participants attending the training session.

Hours – This column displays the amount of time dedicated to the training seminar.

CRITICAL INCIDENT ON-SITE SERVICES OVERVIEW

This page provides an overview of Critical Incident On-Site that was performed within the reporting period. The Participants and Hours columns are totaled on the report.

Date - This column displays the date of the Critical Incident On-Site Event.

Reason – This column displays the Type of Incident of the Critical Incident On-Site Event.

Account / Division – This column displays the division the CISD is associated to.

Location – This column displays the location where the CISD was held. Webinar trainings have this column unpopulated.

Participants – This column displays the number of participants attending the CISD.

Hours – This column displays the amount of time dedicated to the training seminar.

CRITICAL INCIDENT CONSULTATION OVERVIEW

This page provides an overview of Telephonic Critical Incident Consultations.

Priority – This column displays the priority level of the Critical Incident Consult, as determined by the Counselor and the manager consulting.