

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 01/01/2014 - 03/31/2014

Total Employee Population: 5800

General Summary, 1st Quarter

| | |
|---|------------|
| TOTAL # OF CASES | 104 |
| TOTAL # OF SESSIONS | 242 |
| TELEPHONE INQUIRES ONLY | 23 |
| NO SHOWS / CANCELLATIONS | 50 |
| # OF ON-SITE PROGRAMS | 3 |
| # OF EMPLOYEES PARTICIPATING IN ON-SITE PROGRAMS | 70 |
| # OF CASE CLIENTS | 126 |
| TOTAL # OF CLIENTS SERVED | 196 |

Detailed information on following page(s)

Activity To Date

| | Q1 | Q2 | Q3 | Q4 | YTD | YTD% |
|---|------------|----|----|----|------------|------|
| TOTAL # OF CASES | 104 | | | | 104 | 2% |
| TOTAL # OF SESSIONS | 242 | | | | 242 | 4% |
| TELEPHONE INQUIRES ONLY | 23 | | | | 23 | |
| NO SHOWS / CANCELLATIONS | 50 | | | | 50 | |
| # OF ON-SITE PROGRAMS | 3 | | | | 3 | |
| # OF EMPLOYEES PARTICIPATING IN ON-SITE PROGRAMS | 70 | | | | 70 | |
| # OF CASE CLIENTS | 126 | | | | 126 | 2% |
| TOTAL # OF CLIENTS SERVED | 196 | | | | 196 | |

CLIENT CATEGORIES

| | | | | | | |
|-----------------|------------|--|--|--|------------|--|
| EMPLOYEE | 160 | | | | 160 | |
| CHILD | 0 | | | | 0 | |
| SPOUSE | 0 | | | | 0 | |
| PARTNER | 0 | | | | 0 | |
| OTHER DEPENDENT | 36 | | | | 36 | |
| RETIREE | 0 | | | | 0 | |
| OTHER | 0 | | | | 0 | |
| TOTAL | 196 | | | | 196 | |

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Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 01/01/2014 - 03/31/2014

| | Q1 | Q2 | Q3 | Q4 | YTD |
|---|------------|----|----|----|------------|
| <u>YEARS OF SERVICE TO THE COMPANY</u> | | | | | |
| 1 YEAR OR LESS | 8 | | | | 8 |
| 1-4 YEARS | 17 | | | | 17 |
| 5-9 YEARS | 18 | | | | 18 |
| 10-14 YEARS | 23 | | | | 23 |
| 15 YEARS OR MORE | 22 | | | | 22 |
| NOT GIVEN | 72 | | | | 72 |
| TOTAL # OF EMPLOYEES | 160 | | | | 160 |
| <u>REFERRAL SOURCE</u> | | | | | |
| BROCHURE | 7 | | | | 7 |
| BROCHURE / CARD / POSTER | 0 | | | | 0 |
| CHURCH | 0 | | | | 0 |
| CO-WORKER / FRIEND | 9 | | | | 9 |
| COMMUNITY CENTER | 0 | | | | 0 |
| COMPANY NEWSLETTER | 1 | | | | 1 |
| CONCERN NEWSLETTER | 1 | | | | 1 |
| EMPLOYEE ORIENTATION | 8 | | | | 8 |
| FORMAL MANAGEMENT REFERRAL | 5 | | | | 5 |
| FRIEND | 2 | | | | 2 |
| HEALTH BENEFITS FAIR | 1 | | | | 1 |
| HOME MAILING | 0 | | | | 0 |
| HUMAN RESOURCES | 24 | | | | 24 |
| NEWS BROADCAST | 0 | | | | 0 |
| NEWSLETTER | 0 | | | | 0 |
| NEWSPAPER AD | 0 | | | | 0 |
| NEWSPAPER ARTICLE | 0 | | | | 0 |
| NURSE | 0 | | | | 0 |
| OTHER | 1 | | | | 1 |
| PROGRAM BY CONCERN | 71 | | | | 71 |
| RADIO | 0 | | | | 0 |
| RELATIVE | 15 | | | | 15 |
| SCHOOL | 0 | | | | 0 |
| SELF | 6 | | | | 6 |
| SUPERVISOR | 3 | | | | 3 |
| TELEVISION | 0 | | | | 0 |
| UNION REPRESENTATIVE | 0 | | | | 0 |
| WEBSITE | 0 | | | | 0 |
| PREVIOUS EAP CLIENT | 41 | | | | 41 |
| YOUTH ACTIVITY | 0 | | | | 0 |
| TOTAL | 195 | | | | 195 |

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 01/01/2014 - 03/31/2014

| <u>PRIMARY PROBLEMS</u> | Q1 | Q2 | Q3 | Q4 | YTD |
|---------------------------------|------------|----|----|----|------------|
| ALCOHOL ABUSE | 0 | | | | 0 |
| ANOTHER'S ALCOHOL OR DRUG ABUSE | 1 | | | | 1 |
| DRUG ABUSE | 1 | | | | 1 |
| EMOTIONAL / PSYCHOLOGICAL | 50 | | | | 50 |
| FAMILY / CHILD | 20 | | | | 20 |
| FAMILY VIOLENCE | 0 | | | | 0 |
| FINANCIAL | 0 | | | | 0 |
| JOB PERFORMANCE | 1 | | | | 1 |
| LEGAL | 0 | | | | 0 |
| MARITAL / RELATIONSHIP | 43 | | | | 43 |
| OTHER | 70 | | | | 70 |
| OTHER JOB RELATED | 10 | | | | 10 |
| OTHER MENTAL HEALTH | 0 | | | | 0 |
| PHYSICAL HEALTH | 0 | | | | 0 |
| VIOLENT CRIME | 0 | | | | 0 |
| TOTAL | 196 | | | | 196 |

INSURANCE BASED TREATMENT RECOMMENDATION

| | | | | | |
|--------------------------------|----------|--|--|--|----------|
| CHEMICAL DEPENDENCY INPATIENT | 0 | | | | 0 |
| CHEMICAL DEPENDENCY OUTPATIENT | 0 | | | | 0 |
| MEDICAL EVALUATION | 1 | | | | 1 |
| PSYCHIATRIC INPATIENT | 0 | | | | 0 |
| PSYCHIATRIC OUTPATIENT | 0 | | | | 0 |
| PSYCHOLOGICAL OUTPATIENT | 0 | | | | 0 |
| *TOTAL | 1 | | | | 1 |

** In some cases, a client uses several forms of treatment.*

NON-INSURANCE BASED TREATMENT RECOMMENDATIONS

| | | | | | |
|------------------------------|----------|--|--|--|----------|
| ALCOHOL / DRUG EDUCATION | 0 | | | | 0 |
| ANGER EDUCATION | 0 | | | | 0 |
| CONCERN ONLY | 0 | | | | 0 |
| FINANCIAL / LEGAL ASSISTANCE | 0 | | | | 0 |
| GROUP THERAPY | 0 | | | | 0 |
| MARITAL / FAMILY COUNSELING | 0 | | | | 0 |
| MEDICATION | 0 | | | | 0 |
| OTHER | 0 | | | | 0 |
| OTHER EDUCATION | 0 | | | | 0 |
| SELF-HELP / SUPPORT GROUP | 0 | | | | 0 |
| *TOTAL | 0 | | | | 0 |

** In some cases, a client uses several forms of treatment.*

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 01/01/2014 - 03/31/2014

TRAINING OR PROMOTIONAL ACTIVITIES

JANUARY – FEBRUARY – MARCH – provided the monthly 2 page email newsletter, The CONCERN Connection, for distribution

JANUARY 14 - Judy Bookman conducted a 2 hour "Communication Skills for Chiefs" at the SC Jail with 20 employees as requested by Capt. Deidra Woods.

JANUARY 30 - Paula Wilkinson manned a "Health Forum Booth with information re:EAP benefits" from 7:00am - 4:00pm.

MARCH 19 - Linda Jones attended a "Health Fair" from 10:00am - 2:00pm at the SC Health Department with 50 employees as requested by Kay Baker.

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 10/01/2014 - 12/31/2014

Total Employee Population: 5800

General Summary, 4th Quarter

| | |
|---|------------|
| TOTAL # OF CASES | 119 |
| TOTAL # OF SESSIONS | 238 |
| TELEPHONE INQUIRES ONLY | 22 |
| NO SHOWS / CANCELLATIONS | 74 |
| # OF ON-SITE PROGRAMS | 1 |
| # OF EMPLOYEES PARTICIPATING IN ON-SITE PROGRAMS | 7 |
| # OF CASE CLIENTS | 134 |
| TOTAL # OF CLIENTS SERVED | 141 |

Detailed information on following page(s)

Activity To Date

| | Q1 | Q2 | Q3 | Q4 | YTD | YTD% |
|---|------------|------------|------------|------------|------------|------|
| TOTAL # OF CASES | 105 | 123 | 118 | 119 | 465 | 8% |
| TOTAL # OF SESSIONS | 243 | 259 | 280 | 238 | 1020 | 18% |
| TELEPHONE INQUIRES ONLY | 30 | 28 | 29 | 22 | 109 | |
| NO SHOWS / CANCELLATIONS | 50 | 88 | 73 | 74 | 285 | |
| # OF ON-SITE PROGRAMS | 3 | 5 | 4 | 1 | 13 | |
| # OF EMPLOYEES PARTICIPATING IN ON-SITE PROGRAMS | 70 | 45 | 24 | 7 | 146 | |
| # OF CASE CLIENTS | 127 | 149 | 134 | 134 | 544 | 9% |
| TOTAL # OF CLIENTS SERVED | 197 | 194 | 158 | 141 | 690 | |

CLIENT CATEGORIES

| | | | | | |
|-----------------|------------|------------|------------|------------|------------|
| EMPLOYEE | 161 | 148 | 118 | 105 | 532 |
| CHILD | 0 | 0 | 0 | 0 | 0 |
| SPOUSE | 0 | 0 | 0 | 0 | 0 |
| PARTNER | 0 | 0 | 0 | 0 | 0 |
| OTHER DEPENDENT | 36 | 44 | 38 | 35 | 153 |
| RETIREE | 0 | 0 | 0 | 0 | 0 |
| OTHER | 0 | 1 | 0 | 0 | 1 |
| TOTAL | 197 | 193 | 156 | 140 | 686 |

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 10/01/2014 - 12/31/2014

| | Q1 | Q2 | Q3 | Q4 | YTD |
|---|------------|------------|------------|------------|------------|
| <u>YEARS OF SERVICE TO THE COMPANY</u> | | | | | |
| 1 YEAR OR LESS | 8 | 9 | 4 | 6 | 27 |
| 1-4 YEARS | 17 | 20 | 15 | 22 | 74 |
| 5-9 YEARS | 19 | 21 | 14 | 19 | 73 |
| 10-14 YEARS | 23 | 20 | 25 | 19 | 87 |
| 15 YEARS OR MORE | 22 | 31 | 33 | 29 | 115 |
| NOT GIVEN | 72 | 47 | 27 | 10 | 156 |
| TOTAL # OF EMPLOYEES | 161 | 148 | 118 | 105 | 532 |
| <u>REFERRAL SOURCE</u> | | | | | |
| BROCHURE | 7 | 4 | 5 | 10 | 26 |
| BROCHURE / CARD / POSTER | 0 | 2 | 0 | 0 | 2 |
| CHURCH | 0 | 0 | 0 | 0 | 0 |
| CO-WORKER / FRIEND | 9 | 9 | 14 | 9 | 41 |
| COMMUNITY CENTER | 0 | 0 | 0 | 0 | 0 |
| COMPANY NEWSLETTER | 1 | 1 | 1 | 1 | 4 |
| CONCERN NEWSLETTER | 1 | 2 | 1 | 2 | 6 |
| EMPLOYEE ORIENTATION | 8 | 5 | 3 | 3 | 19 |
| FORMAL MANAGEMENT REFERRAL | 5 | 4 | 5 | 4 | 18 |
| FRIEND | 2 | 1 | 1 | 1 | 5 |
| HEALTH BENEFITS FAIR | 1 | 0 | 1 | 0 | 2 |
| HOME MAILING | 0 | 0 | 0 | 0 | 0 |
| HUMAN RESOURCES | 25 | 35 | 29 | 30 | 119 |
| NEWS BROADCAST | 0 | 0 | 0 | 0 | 0 |
| NEWSLETTER | 0 | 0 | 0 | 0 | 0 |
| NEWSPAPER AD | 0 | 0 | 0 | 0 | 0 |
| NEWSPAPER ARTICLE | 0 | 0 | 0 | 0 | 0 |
| NURSE | 0 | 1 | 0 | 0 | 1 |
| OTHER | 1 | 3 | 0 | 0 | 4 |
| PROGRAM BY CONCERN | 71 | 50 | 26 | 7 | 154 |
| RADIO | 0 | 0 | 0 | 0 | 0 |
| RELATIVE | 15 | 9 | 12 | 16 | 52 |
| SCHOOL | 0 | 0 | 0 | 0 | 0 |
| SELF | 6 | 3 | 4 | 4 | 17 |
| SUPERVISOR | 3 | 7 | 4 | 5 | 19 |
| TELEVISION | 0 | 0 | 0 | 0 | 0 |
| UNION REPRESENTATIVE | 0 | 1 | 0 | 0 | 1 |
| WEBSITE | 0 | 0 | 0 | 0 | 0 |
| PREVIOUS EAP CLIENT | 40 | 43 | 38 | 37 | 158 |
| YOUTH ACTIVITY | 0 | 0 | 0 | 0 | 0 |
| TOTAL | 195 | 180 | 144 | 129 | 648 |

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 10/01/2014 - 12/31/2014

| <u>PRIMARY PROBLEMS</u> | Q1 | Q2 | Q3 | Q4 | YTD |
|---------------------------------|------------|------------|------------|------------|------------|
| ALCOHOL ABUSE | 0 | 0 | 5 | 6 | 11 |
| ANOTHER'S ALCOHOL OR DRUG ABUSE | 1 | 1 | 0 | 0 | 2 |
| DRUG ABUSE | 1 | 1 | 1 | 0 | 3 |
| EMOTIONAL / PSYCHOLOGICAL | 51 | 55 | 53 | 49 | 208 |
| FAMILY / CHILD | 20 | 25 | 24 | 25 | 94 |
| FAMILY VIOLENCE | 0 | 1 | 0 | 0 | 1 |
| FINANCIAL | 0 | 2 | 0 | 0 | 2 |
| JOB PERFORMANCE | 1 | 2 | 5 | 1 | 9 |
| LEGAL | 0 | 1 | 0 | 0 | 1 |
| MARITAL / RELATIONSHIP | 42 | 45 | 32 | 36 | 155 |
| OTHER | 70 | 45 | 24 | 7 | 146 |
| OTHER JOB RELATED | 10 | 14 | 11 | 15 | 50 |
| OTHER MENTAL HEALTH | 0 | 0 | 0 | 0 | 0 |
| PHYSICAL HEALTH | 0 | 1 | 0 | 1 | 2 |
| VIOLENT CRIME | 0 | 0 | 0 | 0 | 0 |
| TOTAL | 196 | 193 | 155 | 140 | 684 |

INSURANCE BASED TREATMENT RECOMMENDATION

| | | | | | |
|--------------------------------|----------|----------|----------|----------|----------|
| CHEMICAL DEPENDENCY INPATIENT | 0 | 0 | 1 | 0 | 1 |
| CHEMICAL DEPENDENCY OUTPATIENT | 0 | 0 | 1 | 0 | 1 |
| MEDICAL EVALUATION | 1 | 0 | 0 | 0 | 1 |
| PSYCHIATRIC INPATIENT | 0 | 0 | 0 | 0 | 0 |
| PSYCHIATRIC OUTPATIENT | 0 | 3 | 1 | 0 | 4 |
| PSYCHOLOGICAL OUTPATIENT | 0 | 0 | 1 | 0 | 1 |
| *TOTAL | 1 | 3 | 4 | 0 | 8 |

* In some cases, a client uses several forms of treatment.

NON-INSURANCE BASED TREATMENT RECOMMENDATIONS

| | | | | | |
|------------------------------|----------|----------|----------|----------|----------|
| ALCOHOL / DRUG EDUCATION | 0 | 0 | 0 | 0 | 0 |
| ANGER EDUCATION | 0 | 0 | 0 | 0 | 0 |
| CONCERN ONLY | 0 | 0 | 0 | 0 | 0 |
| FINANCIAL / LEGAL ASSISTANCE | 0 | 0 | 0 | 0 | 0 |
| GROUP THERAPY | 0 | 1 | 0 | 0 | 1 |
| MARITAL / FAMILY COUNSELING | 0 | 0 | 0 | 0 | 0 |
| MEDICATION | 0 | 0 | 0 | 0 | 0 |
| OTHER | 0 | 0 | 0 | 0 | 0 |
| OTHER EDUCATION | 0 | 0 | 0 | 0 | 0 |
| SELF-HELP / SUPPORT GROUP | 0 | 0 | 2 | 0 | 2 |
| *TOTAL | 0 | 2 | 2 | 0 | 4 |

* In some cases, a client uses several forms of treatment.

CONCERN: EAP

Utilization Report

SHELBY COUNTY GOVERNMENT

Date Range: 10/01/2014 - 12/31/2014

TRAINING OR PROMOTIONAL ACTIVITIES

JANUARY – FEBRUARY – MARCH – provided the monthly 2 page email newsletter, The CONCERN Connection, for distribution

JANUARY 14 - Judy Bookman conducted a 2 hour "Communication Skills for Chiefs" at the SC Jail with 20 employees as requested by Capt. Deidra Woods.

JANUARY 30 - Paula Wilkinson manned a "Health Forum Booth with information re:EAP benefits" from 7:00am - 4:00pm.

MARCH 19 - Linda Jones attended a "Health Fair" from 10:00am - 2:00pm at the SC Health Department with 50 employees as requested by Kay Baker.

APRIL – MAY – JUNE – provided the monthly 2 page email newsletter, The CONCERN Connection, for distribution.

APRIL 9 - Judy Bookman conducted a 1 hour "Workshop: Balancing Career and Personal Life" with four 911 Dispatchers as requested by Susan Lampley.

APRIL 15 - Paula Wilkinson dropped off 200 brochures.

APRIL 22 - Paula Wilkinson conducted a 30 minute "Orientation for new recruits" at the Correctional Facility-Training Academy with 31 employees as requested by Lieutenant Talley.

MAY 16 - Paula Wilkinson conducted a "CISD-Employee Death" from 1:00pm - 3:00pm with 4 employees as requested by Phyllis Shephard - Court Clerk's Office.

MAY 14 - Judy Bookman conducted a 1 hour "Balancing Career and Personal Life workshop" with six 911 Dispatchers as requested by Susan Lampley.

The Director of Concern EAP contacts approximately 30% of all new clients at Concern for a Client Satisfaction Survey. Below are the results of this survey taken from your employees

14 Respondents
3.96 out of 4 for Front Office and Ease of Scheduling
4 out of 4 for Counselor
4 out of 4 Overall

Comments:

"She made feel a lot better. Everything was professional and right on point."
"I was so frightened. I never wanted to use the EAP, but you saved my life. I thank you and my family thanks you."
"The lady that scheduled the initial appointment could have been friendlier on the phone."
"He understood what was going on and handled it professionally."
"It was a good experience. I'm looking forward to coming back."
"I really appreciate the service."
"It was a positive experience. I scheduled another appointment."

Concern:EAP poster and computer calendars included in 2nd Quarter Report.

JULY – AUGUST – SEPTEMBER – provided the monthly 2 page email newsletter, The CONCERN Connection, for distribution.

AUGUST 5 - Paula Wilkinson conducted a "CISD" from 1:30pm - 4:00pm with 2 employees at the Roads, Bridges & Engineering Dept as requested by Kathy Lyon and Charles Wood.

AUGUST 19 - Judy Bookman conducted a 3 hour "Ethics training" with 8 employees as requested by Venus Jordan.

AUGUST 20 - Judy Bookman conducted a 1 hour "Balancing Career and Personal Life" with 8 employees at the 911 Dispatch office as requested by Susan Lampley.

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SHELBY COUNTY GOVERNMENT

Date Range: 10/01/2014 - 12/31/2014

SEPTEMBER 10 - Judy Bookman conducted a 1 hour "Balancing Career and Personal Life" with 6 employees at the 911 Dispatch office as requested by Susan Lampley.

Third Quarter Results

Shelby County Government

10 Respondents

4.0 out of 4 for Front Office and Ease of Scheduling

4.0 out of 4 for Counselor

4.0 out of 4 for Overall Score

Comments: "He was very open and accepting. I look forward to talking to him again."

"It was very easy to schedule an appointment."

"The scheduler was very polite and helpful. The counselor was perfect. Even though my wife and I have problems, after the session our weekend was a lot better. It really helped."

"It was very easy to get an appointment. I called and got an appointment the same day. The lady that scheduled my appointment was very pleasant. The counselor listened well."

"She was very helpful and concerned."

"I love her! I can't wait for my next appointment. She really knows what she's doing."

"He was a very good listener."

"He was very good. He immediately found me resources. I really like him."

OCTOBER – NOVEMBER – DECEMBER – provided the monthly 2 page email newsletter, The CONCERN Connection, for distribution.

OCTOBER 22 - Judy Bookman conducted a 1 hour "Balancing Career and Personal Life" with seven 911 Dispatch employees as requested by Susan Lampley.

Fourth Quarter Results

12 Responses

Front Office / Scheduling = 3.75 out of 4.0

Counselor = 4.0 out of 4.0

Overall Experience = 3.88 out of 4.0

Comments:

"Don was very nice. The experience was wonderful. I'm coming back and bringing my daughter."

"The front office staff were very professional and polite. Don was great!"

"Keep doing the good work you're doing."

"The counselor definitely understood what I was telling him."

"When I called to schedule an appointment the office was really busy, so she had to call me back. Everything was fine."

"It was a very positive experience. The receptionist made me feel comfortable. It was comfortable and professional – it was all very positive."

"Iquanna was very helpful. She spent a lot of time with me trying to find the right location and time. Then she remembered what I wanted and called me back when you had a cancellation. Ann greeted me in the office. They were both exceptionally nice. The counselor was super. He was a good listener, had some good comments and was very observant. He made me feel comfortable. I wouldn't change a thing!"

"Miss Ann was very sweet. The counselor made me feel comfortable. Everything went well. They made me feel welcome."

"It went very well."

"It was very easy to make an appointment. Ann was very friendly and polite. My son told me that night that he felt different after speaking with the counselor. He said that he felt relieved. You did everything well."

"The counselor was very nice."