

**STAY AHEAD** of Productivity, Performance and Health Issues

**Lee County**

Monthly Utilization Report  
Reporting Period (12/1/2018 - 12/31/2018)

	This Month		Year To Date		Last Year	
<b>Access To Services</b>						
<b>Telephone/Email Access</b>						
EAP	13	87%	164	81%	138	83%
FamilySource	0	0%	6	3%	4	2%
FinancialConnect	0	0%	4	2%	5	3%
LegalConnect	2	13%	29	14%	19	11%
<b>Sub Total</b>	<b>15</b>		<b>203</b>		<b>166</b>	
<b>Online Access</b>						
EAP	8	33%	111	18%	122	25%
FamilySource	9	38%	147	23%	107	22%
FinancialConnect	1	4%	67	11%	60	12%
Health & Wellness	6	25%	43	7%	40	8%
Health Care Navigation	0	0%	8	1%	7	1%
LegalConnect	0	0%	257	41%	157	32%
<b>Sub Total</b>	<b>24</b>		<b>633</b>		<b>493</b>	
<b>Combined Access</b>						
EAP	21	54%	275	33%	260	39%
FamilySource	9	23%	153	18%	111	17%
FinancialConnect	1	3%	71	8%	65	10%
Health & Wellness	6	15%	43	5%	40	6%
Health Care Navigation	0	0%	8	1%	7	1%
LegalConnect	2	5%	286	34%	176	27%
<b>Total</b>	<b>39</b>		<b>836</b>		<b>659</b>	
<b>Additional EAP Services</b>						
Critical Incident Debriefing Sessions (number is excluded from overall utilization counts)	0		2		1	
Critical Incident Debriefing Event Participants	0		7		1	
Training Sessions (number is excluded from overall utilization counts)	2		43		47	
Training Session Participants	21		384		463	
<b>Total Utilization</b>	<b>60</b>		<b>1,227</b>		<b>1,123</b>	

<b>Utilization Results</b>		
<b>Total Utilization Rate (% - Annualized)</b>	<b>22.22%</b>	<b>38.30%</b>
<i>Based on Monthly Average Employee Counts</i>	3,241	3,204

	<b>This Month</b>		<b>Year To Date</b>		<b>Last Year</b>		
<b>Toll Free Number Statistics</b>							
Call Volume		24		362		296	
Average Speed of Answer in seconds		1.0		6.5		9.8	
Call Abandonment Rate		0.0%		3.6%		2.4%	
<b>Case Closure (only EAP cases)</b>							
Resolved within EAP		1	100%	97	93%	122	91%
Referred to benefits resource	Outpatient	0	0%	7	7%	12	9%
<b>Total</b>		<b>1</b>		<b>104</b>		<b>134</b>	

	This Month		Year To Date		Last Year	
<b>Referral Source</b>						
Brochure	0	0%	6	3%	14	8%
Decline	0	0%	2	1%	1	1%
Email	0	0%	1	0%	1	1%
Family	0	0%	10	5%	4	2%
Flyer	0	0%	1	0%	3	2%
Formal Referral	1	7%	6	3%	18	11%
GuidanceResources Online	0	0%	3	1%	3	2%
HR	3	20%	62	31%	40	24%
Internal	2	13%	3	1%	0	0%
Internet / Intranet	0	0%	2	1%	3	2%
Online - Ask the Expert	1	7%	1	0%	5	3%
Other	1	7%	8	4%	7	4%
Peer	0	0%	2	1%	4	2%
Posters	0	0%	1	0%	1	1%
Previous GR User	2	13%	11	5%	9	5%
Supervisor/Manager	0	0%	8	4%	4	2%
Union	0	0%	2	1%	0	0%
Unknown	5	33%	74	36%	49	30%
<b>Sub Total</b>	<b>15</b>		<b>203</b>		<b>166</b>	
<b>Client Status</b>						
Employee	15	100%	155	76%	127	77%
Dependent	0	0%	29	14%	24	14%
Member	0	0%	1	0%	0	0%
Other	0	0%	2	1%	2	1%
Significant Other	0	0%	1	0%	0	0%
Spouse	0	0%	15	7%	11	7%
Student	0	0%	0	0%	1	1%
Unknown	0	0%	0	0%	1	1%
<b>Sub Total</b>	<b>15</b>		<b>203</b>		<b>166</b>	
<b>Client Gender</b>						
Decline	0	0%	0	0%	4	2%
Female	10	67%	105	52%	101	61%
Male	5	33%	98	48%	61	37%
<b>Sub Total</b>	<b>15</b>		<b>203</b>		<b>166</b>	

	This Month		Year To Date		Last Year	
<b>Client Age Group</b>						
0-12	0	0%	8	4%	8	5%
13-19	0	0%	16	8%	9	5%
20-29	1	7%	21	10%	16	10%
30-39	3	20%	33	16%	35	21%
40-49	3	20%	48	24%	32	19%
50-59	6	40%	35	17%	43	26%
60 +	0	0%	20	10%	5	3%
Unknown	2	13%	20	10%	17	10%
Decline	0	0%	2	1%	1	1%
<b>Sub Total</b>	<b>15</b>		<b>203</b>		<b>166</b>	
<b>Employee Job Category (employee data only)</b>						
Administration	0	0%	6	4%	5	4%
Customer Service and Reservation Agent	0	0%	1	1%	0	0%
Declined	6	40%	33	21%	26	20%
Dispatch	0	0%	0	0%	1	1%
Laborer	0	0%	0	0%	7	6%
Management	3	20%	6	4%	7	6%
Office / Clerical	0	0%	8	5%	9	7%
Operations	0	0%	2	1%	4	3%
Police / Fire	0	0%	4	3%	3	2%
Professional	5	33%	77	50%	45	35%
Sales	0	0%	1	1%	1	1%
Service	0	0%	5	3%	9	7%
Skilled Trade	0	0%	3	2%	2	2%
Technical	1	7%	4	3%	1	1%
Transportation	0	0%	5	3%	7	6%
<b>Sub Total</b>	<b>15</b>		<b>155</b>		<b>127</b>	
<b>Employee Job Tenure (employee data only)</b>						
Less than 1 year	2	13%	17	11%	13	10%
1 - 4 years	1	7%	30	19%	30	24%
5 - 9 years	1	7%	16	10%	17	13%
10 - 14 years	5	33%	24	15%	16	13%
15 - 19 years	0	0%	10	6%	8	6%
20+ years	0	0%	12	8%	11	9%
Unknown	6	40%	40	26%	32	25%
Decline	0	0%	6	4%	0	0%
<b>Sub Total</b>	<b>15</b>		<b>155</b>		<b>127</b>	

	This Month		Year To Date		Last Year	
<b>Employee Assistance Program<sup>®</sup></b>						
<b>U.S. Services</b>						
<b>Primary Issue Presented</b>						
Alcohol/Related	0	0%	4	2%	3	2%
Anger Issues	0	0%	5	3%	4	3%
Anxiety Related	2	15%	13	8%	12	9%
Attention Issues	0	0%	0	0%	1	1%
Bereavement	1	8%	7	4%	7	5%
Depression Related	1	8%	9	5%	9	7%
Domestic Violence	0	0%	2	1%	1	1%
Eating Related Issues	0	0%	0	0%	2	1%
Family Violence	0	0%	0	0%	1	1%
Family/Child	0	0%	2	1%	4	3%
Family/Child - Behavioral Issues	0	0%	1	1%	5	4%
Family/Child - Family Issues	0	0%	10	6%	6	4%
Interpersonal Issues	0	0%	2	1%	0	0%
Legal	0	0%	1	1%	0	0%
Medical	0	0%	2	1%	0	0%
Occupational	2	15%	9	5%	11	8%
Occupational - Conflict Resolution	0	0%	2	1%	0	0%
Occupational - Interpersonal	1	8%	3	2%	5	4%
Occupational - Performance	0	0%	1	1%	0	0%
Partner/Relationship	1	8%	30	18%	20	14%
Psychological	2	15%	32	20%	30	22%
Stress	3	23%	24	15%	12	9%
Substance Use Related	0	0%	1	1%	1	1%
Trauma	0	0%	3	2%	4	3%
Worklife General Request	0	0%	1	1%	0	0%
<b>Sub-Total Issues</b>	<b>13</b>		<b>164</b>		<b>138</b>	

	This Month		Year To Date		Last Year	
<b>Consultation Type</b>						
Face to Face	10	77%	153	93%	126	91%
Bar Association / Consumer Credit Counseling	0	0%	1	1%	0	0%
BehavioralExpert	1	8%	1	1%	4	3%
Community Resources	0	0%	1	1%	0	0%
Supervisor / Management Consult	2	15%	8	5%	8	6%
<b>Sub-Total - Consultations</b>	<b>13</b>		<b>164</b>		<b>138</b>	
<b>Total Number of Issues</b>	<b>13</b>		<b>164</b>		<b>138</b>	
<b>Online Services</b>						
<b>Total Online Services</b>	<b>8</b>		<b>111</b>		<b>122</b>	
<b>Total Product Utilization</b>	<b>21</b>		<b>275</b>		<b>260</b>	
<b>Employee Count</b>						
<b>Total Utilization Rate (% - Annualized)</b>	<b>7.78%</b>		<b>8.58%</b>		<b>8.21%</b>	
<i>Based on Monthly Average employees</i>	3,241		3,204		3,167	

	This Month		Year To Date		Last Year	
<b>FamilySource<sup>®</sup></b>						

**U.S. Services**

**Primary Issue Presented**

Child Care-Infant/Toddler (Centers)	0	0%	0	0%	1	25%
Elder Care-Consultation	0	0%	2	33%	0	0%
Elder Care-Home Health	0	0%	2	33%	0	0%
Elder Care-Medicaid Insurance	0	0%	1	17%	0	0%
Elder Care-transportation	0	0%	0	0%	1	25%
Event Planning-Lodging	0	0%	0	0%	1	25%
Gov't Services-Financial Assistance	0	0%	1	17%	0	0%
Moving-Apartment Hunting	0	0%	0	0%	1	25%
<b>Sub-Total Issues</b>	<b>0</b>		<b>6</b>		<b>4</b>	

<b>Total Number of Issues</b>	<b>0</b>		<b>6</b>		<b>4</b>	
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**Online Services**

Total Online Services	9	100%	147	100%	107	100%
<b>Total Online Services</b>	<b>9</b>		<b>147</b>		<b>107</b>	

<b>Total Product Utilization</b>	<b>9</b>		<b>153</b>		<b>111</b>	
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**Employee Count**

<b>Total Utilization Rate (% - Annualized)</b>	<b>3.33%</b>		<b>4.78%</b>		<b>3.50%</b>	
<i>Based on Monthly Average employees</i>	3,241		3,204		3,167	

	This Month		Year To Date		Last Year	
<b>LegalConnect<sup>®</sup></b>						

**U.S. Services**

**Primary Issue Presented**

Advanced Directives	0	0%	2	7%	1	5%
Bankruptcy	0	0%	1	3%	2	11%
Business	0	0%	1	3%	1	5%
Child Custody	0	0%	2	7%	1	5%
Civil	0	0%	1	3%	1	5%
Consumer	0	0%	1	3%	1	5%
Credit	1	50%	1	3%	0	0%
Criminal	0	0%	2	7%	1	5%
Divorce / Separation	0	0%	7	24%	4	21%
Employment	0	0%	0	0%	1	5%
Estate Planning	0	0%	1	3%	0	0%
Government Benefits	0	0%	0	0%	2	11%
Guardianship	0	0%	1	3%	0	0%
ID Theft Service	0	0%	0	0%	1	5%
Intellectual Property	0	0%	0	0%	1	5%
Landlord/Tenant	0	0%	2	7%	0	0%
Personal Injury	0	0%	2	7%	0	0%
Probate	0	0%	1	3%	0	0%
Real Estate	1	50%	2	7%	1	5%
Trusts	0	0%	1	3%	0	0%
Wills	0	0%	1	3%	1	5%
<b>Sub-Total Issues</b>	<b>2</b>		<b>29</b>		<b>19</b>	

**Consultation Type**

After Hours Report	0	0%	1	3%	0	0%
Client Contact	0	0%	0	0%	1	5%
Consultation and referral (main source)	1	50%	19	66%	9	47%
Consultation and referral (other source)	0	0%	0	0%	1	5%
Consultation only	1	50%	8	28%	8	42%
Missed Appointment	0	0%	1	3%	0	0%
<b>Sub-Total - Consultations</b>	<b>2</b>		<b>29</b>		<b>19</b>	

	This Month	Year To Date	Last Year
<b>Total Number of Issues</b>	<b>2</b>	<b>29</b>	<b>19</b>
<b>Online Services</b>			
Total Online Services	0	257	157
	0%	100%	100%
<b>Total Online Services</b>	<b>0</b>	<b>257</b>	<b>157</b>
<b>Total Product Utilization</b>			
<b>Total Product Utilization</b>	<b>2</b>	<b>286</b>	<b>176</b>
<b>Employee Count</b>			
<b>Total Utilization Rate (% - Annualized)</b>	<b>0.74%</b>	<b>8.93%</b>	<b>5.56%</b>
<i>Based on Monthly Average employees</i>	3,241	3,204	3,167

	This Month		Year To Date		Last Year	
<b>FinancialConnect<sup>SM</sup></b>						
<b>U.S. Services</b>						
<b>Primary Issue Presented</b>						
Credit Card Debt	0	0%	1	25%	1	20%
Credit history & issues	0	0%	2	50%	1	20%
General Financial	0	0%	1	25%	0	0%
Hardship call, requesting financial assistance or lc	0	0%	0	0%	1	20%
Income tax issues	0	0%	0	0%	1	20%
Student Loan Debt	0	0%	0	0%	1	20%
<b>Sub-Total Issues</b>	<b>0</b>		<b>4</b>		<b>5</b>	
<b>Consultation Type</b>						
Ask the Expert	0	0%	1	25%	1	20%
Consultation and referral (main source)	0	0%	1	25%	0	0%
Consultation and referral (other source)	0	0%	1	25%	0	0%
Consultation only	0	0%	1	25%	3	60%
Consultation with literature	0	0%	0	0%	1	20%
<b>Sub-Total - Consultations</b>	<b>0</b>		<b>4</b>		<b>5</b>	
<b>Total Number of Issues</b>	<b>0</b>		<b>4</b>		<b>5</b>	
<b>Online Services</b>						
Total Online Services	1	100%	67	100%	60	100%
<b>Total Online Services</b>	<b>1</b>		<b>67</b>		<b>60</b>	
<b>Total Product Utilization</b>	<b>1</b>		<b>71</b>		<b>65</b>	
<b>Employee Count</b>						
<b>Total Utilization Rate (% - Annualized)</b>	<b>0.37%</b>		<b>2.22%</b>		<b>2.05%</b>	
<i>Based on Monthly Average employees</i>	3,241		3,204		3,167	

This Month

Year To Date

Last Year

GuidanceResources Online <sup>®</sup>

English USA Usage

Online Topics

	This Month		Year To Date		Last Year	
<b>Financial</b>						
Consumer Issues	0	0%	18	5%	15	4%
Debt & Bankruptcy	0	0%	13	4%	18	5%
Estate Planning & Elder Care	0	0%	3	1%	0	0%
Insurance	0	0%	5	1%	3	1%
Personal Finance	0	0%	21	6%	14	4%
Real Estate	0	0%	2	1%	5	1%
Tax	0	0%	5	1%	1	0%
<b>Home &amp; Auto</b>						
Buying & Selling an Auto	0	0%	2	1%	2	1%
Driver Safety & Education	0	0%	0	0%	2	1%
Home Improvement & Maintenance	0	0%	1	0%	3	1%
Home Safety & Security	0	0%	1	0%	1	0%
Moving	0	0%	0	0%	2	1%
<b>Legal</b>						
Consumer Issues	0	0%	0	0%	5	1%
Criminal Law	0	0%	0	0%	2	1%
Debt & Bankruptcy	0	0%	4	1%	6	2%
Estate Planning & Elder Law	0	0%	32	10%	2	1%
Family Law	0	0%	6	2%	16	5%
Insurance	0	0%	1	0%	0	0%
Lawyers & Court	0	0%	1	0%	1	0%
Real Estate	0	0%	3	1%	5	1%
Tax	0	0%	1	0%	1	0%
<b>Lifestyle</b>						
Computers & Electronics	0	0%	1	0%	6	2%
Food & Beverage	0	0%	1	0%	0	0%
Pets	0	0%	0	0%	4	1%
Planning an Event	2	9%	4	1%	0	0%
Travel	0	0%	1	0%	2	1%
<b>Relationships</b>						
Child Care	0	0%	3	1%	2	1%
Divorce & Domestic Issues	0	0%	10	3%	11	3%
Elder Care	0	0%	1	0%	1	0%
Marriage & Relationships	6	26%	16	5%	28	8%

	<b>This Month</b>		<b>Year To Date</b>		<b>Last Year</b>	
Parenting	0	0%	14	4%	11	3%
Special Needs & Gifted Children	0	0%	1	0%	2	1%
<b>Wellness</b>						
Addiction	0	0%	8	2%	9	3%
Emotional Well-being	6	26%	21	6%	26	8%
Fitness & Nutrition	0	0%	15	4%	5	1%
Grief & Loss	0	0%	2	1%	4	1%
Personal Growth	0	0%	30	9%	32	9%
Personal Safety	1	4%	2	1%	0	0%
Physical Health	3	13%	14	4%	7	2%
Pregnancy	1	4%	1	0%	0	0%
Stress & Anger Management	0	0%	8	2%	7	2%
<b>Work &amp; Education</b>						
Career Development	0	0%	5	1%	5	1%
College & Graduate School	0	0%	1	0%	0	0%
In the Workplace	2	9%	20	6%	21	6%
K-12 School	0	0%	9	3%	0	0%
Manager Guidance	1	4%	5	1%	11	3%
Military	0	0%	0	0%	1	0%
Personal Development	1	4%	23	7%	42	12%
	<b>23</b>		<b>335</b>		<b>341</b>	
<b>Online Searches Topics</b>						
Certified Financial Planner	1	100%	15	5%	9	6%
Child Care Provider	0	0%	18	6%	6	4%
College and University	0	0%	2	1%	5	3%
Elder Care Provider	0	0%	58	19%	9	6%
Lawyer	0	0%	205	69%	123	81%
	<b>1</b>		<b>298</b>		<b>152</b>	
<b>Online Activity Type</b>						
Article	13	54%	227	36%	192	39%
Assessment	7	29%	21	3%	54	11%
Merchandise	0	0%	18	3%	15	3%
Multimedia	2	8%	47	7%	60	12%
Resource	1	4%	22	3%	20	4%
Search Database	1	4%	298	47%	152	31%
<b>Total Activity Types</b>	<b>24</b>		<b>633</b>		<b>493</b>	
<b>Total Product Utilization</b>			<b>633</b>		<b>493</b>	