

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

This Employee Assistance Program Services Agreement (hereinafter, the "Services Agreement") is made and entered into by and between Aetna Behavioral Health, LLC, on behalf of itself and its affiliates (hereinafter "Company") and Lee County Board of County Commissioners (hereinafter "Customer").

WHEREAS, Customer has established an employee assistance program ("EAP") for certain eligible individuals; and

WHEREAS, Customer also desires to engage the services of Company to provide EAP services and WorkLife and other additional EAP services which are defined in this Agreement (the "Services"),

THEREFORE, in consideration of the mutual covenants and promises stated herein and other good and valuable consideration, the parties hereby enter into this Services Agreement. This Services Agreement includes and incorporates by reference the attached **General Conditions Addendum, Domestic Description of EAP Services Addendum, Description of Work/Life Services Addendum, Domestic EAP Service and Fee Schedule**, and the Business Associate Agreement entered into between Aetna Life Insurance Company, on behalf of itself and its affiliates (including Aetna Behavioral Health, LLC) and Customer, as may be amended from time to time, and is referred to herein as the "Business Associate Agreement".

Customer hereby elects to receive the Services set forth in the **Domestic EAP Service and Fee Schedule** attached hereto and made a part hereof. The corresponding Service Fees are specified in the **Domestic EAP Service and Fee Schedule**, which shall be amended for future periods, in accordance with Section 3 of the **General Conditions Addendum**, to reflect the Services elected and corresponding Service Fees for such periods.

This Services Agreement (including incorporated addendums) constitutes the complete and exclusive contract between the parties and supersedes any and all prior or contemporaneous oral or written communications or proposals not expressly included herein. Notwithstanding Section 3 of the **General Conditions Addendum**, no modification or amendment of this Services Agreement shall be valid unless contained in writing and signed by a duly authorized representative of Company and a duly authorized representative of Customer. By executing this Services Agreement, Customer acknowledges and agrees that it has reviewed all terms and conditions incorporated into this Services Agreement and intends to be legally bound by the same.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

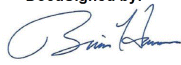
The initial term of this Services Agreement shall be from 01/01/2024, the "Effective Date," through 12/31/2026.

IN WITNESS WHEREOF, the parties hereto have caused this Services Agreement to be executed by their duly authorized representatives.

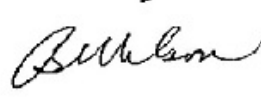
LEE COUNTY BOARD OF COUNTY COMMISSIONERS

AETNA BEHAVIORAL HEALTH, LLC

Signed By:

DocuSigned by:

C95438F9BF0F428...
Printed Name: Brian Hamman
Title: Commissioner & Chairman
Date: 9/19/2023 | 3:21 PM EDT

Signed By:



Printed Name: Brooke Wilson
Title: Head of EAP-Resources for Living
Date: August 14, 2023

APPROVED AS TO FORM FOR THE RELIANCE OF LEE COUNTY ONLY:

ATTEST: CLERK OF THE CIRCUIT COURT

DocuSigned by:

D7B0A432435E448...
Deputy County Attorney

DocuSigned by:

7687653FFAF549B...



EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

GENERAL CONDITIONS ADDENDUM

Definitions: In this General Conditions Addendum and in all attachments to this Services Agreement:

- (A) "Employee" means any person eligible to receive Services under this Services Agreement by virtue of being a current employee of Customer, and not designated a temporary employee, and employees of subsidiaries and affiliates of Customer who are reported by Customer, in writing, to Company for inclusion in this Services Agreement.
- (B) "Dependent" means the eligible family members, including domestic partners, household members, and dependents (including adult children up to age 26) of an Employee eligible to receive Services under this Services Agreement as a dependent of an Employee.
- (C) If Applicable, the term "EAP Behavioral Health Professional" may mean EAP Network Provider or EAP Staff Clinician.
- (D) If applicable, the term "EAP Network Providers" shall mean licensed behavioral health professionals, who meet all Company credentialing standards, and who are contracted by Company, as independent contractors, to provide counseling to Members.
- (E) If applicable, the term "EAP Staff Clinicians" shall mean behavioral health professionals who are licensed in the State in which they practice and who are employed by Company to provide clinical services to Members. EAP Staff Clinicians may be part of Company's EAP call center and may provide telephonic clinical services. If applicable, EAP Staff Clinicians may be located at the Customer site and provide counseling at the Customer's location.
- (F) "Members" means Employees and Dependents eligible for Services.
- (G) "Payment Due Date" shall mean the date that payment is required as set forth on the Customer's invoice. Payment Due Date will be 61 calendar days after the first calendar day of the month in which the services are provided. Payment is to be made in a form and manner as reasonably determined by Company.
- (H) The term "Service Fees" shall have the meaning set forth in Section 3 of this General Conditions Addendum.
- (I) The term "Services" shall have the meaning set forth in Section 1 of this General Conditions Addendum.

The following are the terms and conditions under which Company agrees to perform Services for Customer:

1. **Purpose.** Customer will purchase and Company will provide to Customer the Services designated in this Services Agreement and such other services Customer requests of Company and Company agrees in writing to perform, as described in the **Domestic EAP Service and Fee Schedule** and the **Description of Services Addenda** (the "Services").
2. **Term.** The initial term of this Services Agreement shall commence on the Effective Date and shall continue to the third anniversary of the Effective Date, unless terminated by either party in accordance with Section 4 of this **General Conditions Addendum**. Following the initial term and upon mutual written approval, this Services Agreement may be renewed, in whole or in part, for a renewal term or terms not to exceed the initial term of three (3) years, the increments of renewal shall be at the sole discretion of the County as deemed in its best interest, unless terminated by either party in accordance with Section 4 of this General Conditions Addendum.
3. **Service Fees.** The Customer shall pay Company the fees according to the **Domestic EAP Service and Fee Schedule**. Company may change the EAP Services and the EAP Service Fees annually by giving the Customer 30 day's notice before the changes take effect. Change will take effect on the anniversary of the Effective Date unless otherwise indicated in the applicable **Domestic EAP Service and Fee Schedule**. Company shall provide the Customer with an invoice indicating the Service Fees owed for that month. The Customer shall pay Company the Service Fees in accordance with Payment Due Date. The Customer shall provide with their payment either a copy of the Company invoice, modified to reflect current number of employees or a copy of a pre-approved invoice with meets Company's billing requirements. The Customer shall also reimburse Company for certain additional expenses, as stated in the **Domestic EAP Service and Fee Schedule**.
4. **Termination.** This Services Agreement may be terminated by Company or the Customer as follows:

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

(A) Legal Prohibition - If any state or other jurisdiction enacts a law which prohibits the continuance of this Services Agreement, or an existing law is interpreted to prohibit the continuance of this Services Agreement, this Services Agreement shall terminate automatically as to such state or jurisdiction on the effective date of such law or interpretation; provided, however, that if only a portion of this Services Agreement is prohibited by such law, only that portion of this Services Agreement shall be affected, and this Services Agreement shall be construed in all respects as if such invalid or unenforceable provision were omitted.

(B) Customer Termination - Customer may terminate this Services Agreement with respect to all Employees (including their Dependents) or any group of Employees included under this Services Agreement or any subsidiary or affiliate of Customer that is covered under this Services Agreement by giving Company at least **thirty-one (31) days** written notice prior to the end of the initial term or prior to the end of any given contract year within the initial term, after the date of such notice, such termination shall become effective.

(C) Company Termination -

(1) Company may terminate this Services Agreement by giving to Customer at least one hundred and twenty (120) days written notice stating when, after the date of such notice, such termination shall become effective.

(2) Company may terminate this Services Agreement within thirty-one (31) days of transmitting notice to Customer by mail, facsimile transmission or other means of communication (including electronic mail) if (a) Customer fails to pay Service Fees by the Payment Due Date, (b) Customer fails to provide current Employee counts to Company by each Payment Due Date, (c) Company determines that Customer will not meet its obligation to pay such Service Fees and/or provide current Employee counts by the Payment Due Date, and/or (d) Company determines that Customer is in material default, or substantial breach, of one or more of its obligations under this Services Agreement.

(3) Any acceptance by Company of funds or Service Fees described in paragraph 3 above, shall not constitute a waiver of Company's right to terminate this Services Agreement in accordance with this section with respect to any other failure of Customer to meet its obligations hereunder.

5. Customer's Responsibilities.

(A) Employee Count – If needed and where applicable, on or before the Effective Date, Customer may be requested to furnish to Company a listing of Employees (by zip code of each Employee's place of residence). Thereafter, Customer shall supply to Company, on a monthly basis by the Payment Due Date, current Employee counts in a form and manner as reasonably determined by Company. Company shall not be responsible in any manner for any delay or error in the provision of Services caused by the Customer's failure to furnish accurate Employee counts in a timely fashion. If Customer fails to provide current Employee counts with payment by the Payment Due Date, all Employee counts will be updated and reflected in the next billing and payment cycle. Company will not process Employee counts retroactively nor will Company perform any retroactive fee adjustments due to Customer submitting inaccurate Employee counts.

(B) Fiduciary Duty – It is understood and agreed that the Customer, as Plan Administrator, retains complete authority and responsibility for their employee health benefits plan (the "Plan"), its operations, and the benefits provided there under, including EAP (if applicable) and that Company is empowered to act on behalf of Customer in connection with the Plan only to the extent expressly stated in this Services Agreement or as agreed to in writing by Company and Customer.

(C) Summary Plan Description (SPD) – If Customer's EAP is part of the Plan, Customer shall provide Company with all Plan documents at least thirty (30) days prior to the Effective Date or such other date mutually agreed upon by the parties. Absent the Customer providing Company with an SPD, Company shall automatically apply its internal policies and procedures to all EAP plans, including but not limited to internal appeals and external review, as applicable. Company does not review Customer's SPD for compliance with applicable law.

6. Services. Company shall perform the Services set forth in the **Domestic EAP Service and Fee Schedule** and the **Description of Services Addenda**. Customer acknowledges that Company may utilize the services of external contractors in performing these Services. Company and Customer will discharge their obligations under this Services Agreement with that level of reasonable care which a similarly situated EAP Services provider or Plan Administrator under ERISA would exercise under similar circumstances.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

7. **Records.** Customer acknowledges and agrees that Company or its affiliates or authorized agents shall have the right to use all documents, records, reports, and data, including data recorded in Company's data processing systems ("Documentation"), subject to compliance with privacy laws and regulations, including without limitation regulations promulgated pursuant to the Health Insurance Portability and Accountability Act of 1996. All Documentation is stored in accordance with applicable law and may be de-identified as to Members and Customer identity for purposes other than administration of EAP Services, at Company's discretion. Company may de-identify Documentation Records and use them for quality improvement, statistical analyses, product development and other lawful, non-Service-related purposes.

8. Indemnification.

(A) Company shall indemnify and hold harmless Customer, its directors, officers, employees (acting in the course of their employment, but not as Members) for that portion of any third party loss, liability, damage, expense, settlement, cost or obligation (including reasonable attorneys' fees) caused directly by Company's willful misconduct, criminal conduct, breach of this Services Agreement, fraud, breach of fiduciary responsibility, or failure to comply with Section 6 above, related to or arising out of the Services provided under this Services Agreement.

(B) Except as provided in (A) above, and subject to the monetary limits established by Section 768.28, Florida Statutes, as amended from time to time and not to be construed as a waiver of any sovereign immunity rights, Customer shall indemnify and hold harmless Company, its affiliates and their respective directors, officers, and employees for that portion of any third party loss, liability, damage, expense, settlement, cost or obligation (including reasonable attorney's fees): (i) which was caused directly by Customer's willful misconduct, criminal conduct, breach of this Services Agreement, fraud, breach of fiduciary responsibility, or failure to comply with Section 6 above, related to or arising out of this Services Agreement or Customer's role as employer; (ii) in connection with the release or transfer of member-identifiable information to Customer's third party designated by Customer, or the use or further disclosure of such information by such third party.

(C) The party seeking indemnification under (A) or (B) above must notify the indemnifying party within 20 days in writing of any actual or threatened action, suit or proceeding to which it claims such indemnification applies. Failure to so notify the indemnifying party shall not be deemed a waiver of the right to seek indemnification, unless the actions of the indemnifying party have been prejudiced by the failure of the other party to provide notice within the required time period.

The indemnifying party may then take steps to be joined as a party to such proceeding, and the party seeking indemnification shall not oppose any such joinder. Whether or not such joinder takes place, the indemnifying party shall provide the defense with respect to claims to which this Section applies and in doing so shall have the right to control the defense and settlement with respect to such claims.

The party seeking indemnification may assume responsibility for the direction of its own defense at any time, including the right to settle or compromise any claim against it without the consent of the indemnifying party, provided that in doing so it shall be deemed to have waived its right to indemnification except in cases where the indemnifying party has declined to defend against the claim.

(D) Customer and Company agree that, except for counseling services provided by EAP Staff Clinicians: (i) Company does not render medical services or treatments to Members; (ii) neither Customer nor Company is responsible for the health care that is delivered by EAP Network Providers; (iii) EAP Network Providers are solely responsible for the health care they deliver to Members; (iv) EAP Network Providers are not the agents or employees of Customer or Company; and (v) the indemnification obligations of (A) or (B) above do not apply to any portion of any loss, liability, damage, expense, settlement, cost or obligation caused by the acts or omissions of EAP Network Providers with respect to Members.

(E) The indemnification obligations under (A) above shall not apply to that portion of any loss, liability, damage, expense, settlement, cost or obligation caused by Company's act or omission undertaken at the direction of Customer (other than Services described in this Services Agreement). The indemnification obligations under (B) above shall not apply to that portion of any loss, liability, damage, expense, settlement, cost or obligation undertaken by Customer at the direction of Company.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

(F) The indemnification obligations under this Section 8 shall terminate upon the expiration of this Services Agreement, except as to any matter concerning which a claim has been asserted by notice to the other party at the time of such expiration or within two (2) years thereafter.

9. **Remedies.** Other than in an action between the parties for third party indemnification, neither party shall be liable to the other for any consequential, incidental or punitive damages whatsoever.

10. **Binding Arbitration of Certain Disputes.** Any controversy or claim arising out of or relating to this Services Agreement or the breach, termination, or validity thereof, except for temporary, preliminary, or permanent injunctive relief or any other form of equitable relief, shall be settled by binding arbitration in Hartford, CT administered by the American Arbitration Association ("AAA") and conducted by a sole arbitrator in accordance with the AAA's Commercial Arbitration Rules ("Rules"). The arbitration shall be governed by the Federal Arbitration Act, 9 U.S.C. §§ 1-16, to the exclusion of state laws inconsistent therewith or that would produce a different result, and judgment on the award rendered by the arbitrator may be entered by any court having jurisdiction thereof. Except as may be required by law or to the extent necessary in connection with a judicial challenge, or enforcement of an award, neither a party nor the arbitrator may disclose the existence, content, record or results of an arbitration. Fourteen (14) calendar days before the hearing, the parties will exchange and provide to the arbitrator (a) a list of witnesses they intend to call (including any experts) with a short description of the anticipated direct testimony of each witness and an estimate of the length thereof, and (b) premarked copies of all exhibits they intend to use at the hearing. Depositions for discovery purposes shall not be permitted. The arbitrator may award only monetary relief and is not empowered to award damages other than compensatory damages.

11. **Confidentiality.**

(A) **Business Confidential Information** - Each party acknowledges that performance of this Services Agreement may involve access to and disclosure of Customer and Company identifiable business proprietary data, rates, procedures, materials, lists, systems and information of the other (collectively "Business Confidential Information"). No Business Confidential Information shall be disclosed to any third party other than a party's representatives who have a need to know such Information in relation to administration of the EAP Services, and provided that such representatives are informed of the confidentiality provisions hereof and agree to abide by them. All such information must be maintained in strict confidence. Customer agrees that Company may make lawful references to Customer in its marketing activities and in informing health care providers (including EAP Network Providers) as to the organizations and plans for which Services are to be provided.

(B) **Company Confidential Information** - Any information with respect to Company or any of its affiliate's fees or specific rates of payment to health care providers (including EAP Network Providers) and any information which may allow determination of such fees or rates any of the terms and provisions of the health care provider's agreement (including EAP Network Providers) with Company or its affiliates are deemed to be Company Confidential Information. No disclosure of any such information may be made or permitted to Customer or to any third party whatsoever, including, but not limited to, any broker, consultant, auditor, reviewer, administrator or agent unless (i) Company has consented in writing to such disclosure and (ii) each such recipient has executed a confidentiality agreement in form satisfactory to Company's counsel.

(C) **Member Confidential Information** - In addition, each party will maintain the confidentiality of medical records, PHI, PII and confidential Member-identifiable patient information ("Member Confidential Information"), and in accordance with the terms of the Business Associate Agreement.

(D) **Upon Termination** - Upon termination of this Services Agreement, each party, upon the request of the other, will return or destroy all copies of all of the other's Business Confidential Information in its possession or control except to the extent such Confidential Information must be retained pursuant to applicable law, to the extent such Confidential Information cannot be disaggregated from the Company's databases, or except as otherwise provided under the Business Associate Agreement, provided, however, that Company may retain copies of any such Business Confidential Information it deems necessary for the defense of litigation concerning the Services it provided under this Services Agreement.

(E) Customer and Company acknowledge that compliance with the provisions of the foregoing paragraphs are necessary to protect the business and good will of each party and its affiliates and that any actual or potential breach will irreparably cause damage to each party or its affiliates for which money damages may not be adequate. Customer and Company

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

therefore agree that if a party or party's representatives breach or attempt to breach paragraphs (A) through (D) hereof, the other party will not oppose such party's request for temporary, preliminary and permanent equitable relief, without bond, to restrain such breaches, together with any and all other legal and equitable remedies available under applicable law or under this Services Agreement. The prevailing party shall be entitled to recover from the non-prevailing party the attorneys' fees and costs it expends in any action related to such breach or attempted breach.

(F) This Agreement is subject to Chapter 119, Florida Statutes, the Florida Public Record Law.

- 12. **Relationship of the Parties.** It is understood and agreed that Company is an independent contractor with respect to all Services being performed pursuant to this Services Agreement. Company makes no guarantee and disclaims any obligation to make any specific EAP Network Providers or any particular number of EAP Network Providers available for use by Members.
- 13. **Subcontractors.** The work to be performed by Company under this Services Agreement may, at its discretion, be performed directly by it or wholly or in part through a subsidiary or affiliate or under a contract with an organization of its choosing. Company will remain liable for Services under this Services Agreement.
- 14. **Communications.** Company and Customer shall be entitled to rely upon any communication believed by them to be genuine and to have been signed or presented by the proper party or parties.

Neither party shall be bound by any notice, direction, requisition or request unless and until it shall have been received in writing at (i) in the case of Company, PO Box 818048, Cleveland, OH 44181-8048 Attention: EAP Contracting, (ii) in the case of the Customer, at the address shown below, or (iii) at such other address, physical or email as either party specifies for the purposes of this Services Agreement by notice in writing addressed to the other party. Email notices or communications from Customer to Company should be directed to Customer's assigned EAP account representative.

Lee County Board of County Commissioners
1825 Hendry Street, Suite 200
Fort Myers, FL 33901
Attention: Robin Lears, Benefits & Wellness Manager
rlears@leegov.com

- 15. **Force Majeure.** Other than the Customer's obligation to make payments for Services provided by Company to Customer or its Members prior to the Force Majeure, neither party shall be liable for any failure to meet any of the obligations or provide any of the Services or benefits specified or required under this Services Agreement where such failure to perform is due to any contingency beyond the reasonable control of either party, its employees, officers or directors. Such contingencies include but are not limited to: acts or omissions of any person or entity not employed or reasonably controlled by either party, its employees, officers or directors; acts of God; acts of terrorism; pandemic; fires; wars; floods; storms; earthquakes; riots; labor disputes or shortages; and governmental laws, ordinances, rules, regulations, or the opinions rendered by any court, whether valid or invalid.
- 16. **Compliance.** Customer and Company shall remain, throughout the term of this Services Agreement, in compliance with all applicable federal and state laws and regulations, including HIPAA, related to this Services Agreement and the Services to be provided hereunder. Accordingly, the parties agree to the terms of the Business Associate Agreement.
- 17. **Audit Rights.** Customer, or Customer's designee may perform audits of Company's EAP processes only, during normal business hours upon reasonable written notice. A process audit may not be conducted more than once annually and will not include access to individually identifiable Member information. Any requested payment from Company resulting from the audit must be based upon documented findings, agreed to by both parties, and must be solely due to Company's actions or inactions.
- 18. **Miscellaneous.** The Services Agreement shall be governed by and interpreted in accordance with applicable federal law, including but not limited to ERISA. To the extent such federal law does not govern, this Services Agreement shall be governed by Florida law and the courts in such state shall have sole and exclusive jurisdiction of any dispute related hereto or arising hereunder. No delay or failure of either party in exercising any right hereunder shall be deemed to constitute a waiver of that right. There are no intended third party beneficiaries of this Services Agreement. This Section and Sections 3 through 7 and 9 through 11 shall survive termination of the Services Agreement. The provisions of Section 8 shall survive

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

termination only to the extent stated therein. The headings in this Services Agreement are for reference only and shall not affect the interpretation or construction of this Services Agreement.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT**DOMESTIC DESCRIPTION OF EAP SERVICES ADDENDUM**

Subject to the terms and conditions of this Services Agreement, the EAP Services selected by Customer and provided by Company are reflected in this **Domestic Description of EAP Services Addendum** and the **Domestic EAP Service and Fee Schedule** (as modified by Company from time to time pursuant to Section 3 of the **General Conditions Addendum**). Additional EAP Services may be provided at Customer's written request under the terms of this Services Agreement. All Services described in this EAP Services Addendum are available within the 50 U.S. states only, including Puerto Rico, U.S. Virgin Islands, and District of Columbia. International EAP Services are only available if specifically described and priced in a separate International Service and Fee Schedule.

1. **UNLIMITED TELEPHONIC ACCESS:** Unlimited telephonic access to the Company EAP call center staff, available 24 hours per day, 7 days per week, 365 days per year for purposes of assessing Member need and referring to appropriate EAP Services.
2. **SESSION MODEL:** Sessions are intended to assist with emotional, family, personal, or work-related behavioral health issues. Company offers our members the choice in how they wish to use their sessions. Company has a network of professionals who can offer services face-to-face, telephonically, or via televideo (when appropriate), or online chat (when appropriate). Online chat counseling sessions are provided by one of our contracted providers. Each member is entitled, on a contract year, up to the number of sessions per problem as set forth herein in the Service and Fee Schedule (e.g., up to a set number of sessions per member per problem under the EAP Session Model), unless a State regulation requires otherwise. All sessions require prior authorization. The member must contact Company to receive referrals and authorizations for all sessions whether face-to-face, telephonic, or televideo. Marital and/or family sessions are considered one problem for the couple or family and sessions are not authorized individually for each attendee. Face-to-face, telephonic, and televideo sessions count toward the number of sessions per member per problem. One week of online chat counseling messages are equal to one EAP session.
3. **EAP PROVIDER NETWORK:** A nationwide network of licensed behavioral health professionals, who meet all Company credentialing standards, and who are contracted by Company, as independent contractors, to provide counseling to Members. EAP Network Providers include, but are not limited to: social workers, licensed professional counselors, marriage and family therapists, master's level psychiatric nurses and psychologists.
4. **TRAINING AND EDUCATION:** The term "Training and Education" refers to training, provided by Company, or a Company Contracted educator to the Customer, concerning general behavioral health and work/life issues. This includes Employee Orientation Meetings and Supervisor Orientation Trainings. This training may be provided in different ways, i.e. in-person, telephonically, or web-based. Additional fees apply to web-based training over 50 participants (Participants is defined as unique phone lines calling into the webinar). Department of Transportation (DOT) services are excluded from standard Training and Education services. For specialized DOT training, see separate definition under Drug Free Workplace Services. Mental Health First Aid trainings are excluded from standard Training and Education services. For specialized Mental Health First Aid training, see separate definition under Mental Health First Aid.
5. **MANAGEMENT SERVICES:**
 - **MANAGEMENT CONSULTATION:** A telephonic resource for managers, supervisors, and human resources professionals to assist in identifying and resolving workplace issues and promoting a productive workforce. Issues may include but are not limited to employee personal and family issues, behavioral health concerns, workplace conflict, workplace crisis and other disruptions, substance abuse, threats of violence and employee performance concerns. This includes the provisions of guidance to the Customer in making voluntary referrals for employees to the EAP. EAP will coordinate with specialty providers as needed (SAP, DOT, FFD).
 - **MANDATORY REFERRALS:** Case management to assist Customer and employees in addressing significant workplace performance issues. Mandatory referrals are used to monitor compliance with the EAP Behavioral Health Professional's recommendations, wherein the EAP, with appropriate executed release of information forms, confirms the employee's participation in and compliance with the Program.
 - **DRUG FREE WORKPLACE SERVICES:** Suite of services to assist Customer in managing workplace related employee substance misuse and/or disclosure of substance abuse in the workplace. Services for general employer

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

industries include Company EAP case management of mandatory referrals related to workplace impacted substance abuse, as well as management consultation services as described above. Services for transportation related industries, such as employers who are regulated by DOT, FMCSA, FAA, FRA, FTA, PHMSA, etc., include substance abuse case management by a Substance Abuse Professional (SAP) for Department of Transportation regulation compliance. Additional service for transportation regulated employees includes DOT training to meet Drug-Free Workplace regulations regarding drug and alcohol awareness available through American Substance Abuse Professionals (ASAP) or comparable SAP provider. A variety of training formats are available, including on-site, on-line or video.

- **FITNESS FOR DUTY (FFD) CONSULTATION AND COORDINATION:** A Fitness for Duty Evaluation is a forensic evaluation completed by a specially trained psychologist, psychiatrist, outside the EAP, for the purpose of evaluating an employee's ability to safely perform the functions of their job, assess organizational and behavioral risk, and provide a report recommending steps needed to be taken to minimize Customer risk in returning the employee to work. Fitness for Duty Evaluations are outside the scope of EAP, and as such the EAP does not conduct Fitness for Duty Evaluations. Upon specific request, the EAP may assist Customer with locating companies or providers external to the EAP who are capable of performing FFD Evaluations. At all times the Customer is responsible for working directly with the identified FFD provider as well as directly making payment arrangements with that provider for the FFD Evaluation. All decisions, regarding returning to work, retaining or dismissing employees remain with the Customer.
- **SUBSTANCE ABUSE PROFESSIONAL (SAP) CONSULTATION AND CONTACT INFORMATION:** Upon request of Customer, for drug and alcohol cases that fall under the Department of Transportation (DOT) guidelines, Company shall provide initial and ongoing management consultation on DOT issues. Company will further provide contact information of local providers in our specialized network of qualified Substance Abuse Professionals. The Customer is responsible for choosing and working directly with the SAP, as well as performing Follow-up, Compliance and Aftercare attendance monitoring. The Customer is responsible for payment of the SAP and determines whether the employee or employer pays SAP fees as well as recommended treatment costs.
- **MENTAL HEALTH FIRST AID:** An educational program offered to Customers to help managers and employees recognize and respond to mental health issues in the workplace and in the community. The curriculum includes an overview of mental health and provides education about Anxiety, Depression, Suicide, Trauma, Psychosis, and Substance Use Disorders, along with videos, interactive exercises and practice scenarios. The 4-hour and the 6-hour virtual course can be provided at the corporate level. Whether virtual or in-person both the 6-hour in-person and 6-hour virtual courses provide all participants that complete course with Mental Health First Aid Certification for three years. The 4-hour virtual and in-person general awareness courses are available. The 4-hour course does NOT provide participants with a Mental Health First Aid Certification. In-person courses are limited to 30 participants per course. The virtual 4-hour general awareness course has a participant minimum of 15 participants and a maximum of 25 participants. The virtual 6-hour courses have a 15-participant minimum/maximum per course.

Mental Health First Aid Virtual Delivery Requirements for Participants

Virtual courses will be hosted through The National Council for Behavioral Health's Zoom webinar platform, and The National Council will provide a how-to guide for participants who have never used this platform.

- Computer – Windows or Apple desktop or laptop computer OR Mobile Device/Tablet/Surface: iOS, Android, Windows
- Phone (backup audio option) – It is highly recommended that users join the course from a tablet, laptop or desktop computer for the best experience. Phones may be used for audio support.
- Microphone and speakers – Participants whose computers do not have a microphone and/or speaker can use the dial-in option from their phone for audio.
- HD Webcam – Either built into the user's device or external.
- Internet Connection – We recommend an internet speed of at least 5 mbps upload/download speed. Users can test their internet speed here: <https://www.speedtest.net/>

For the virtual 4-hour general awareness course, Customer will ensure that participants review course materials prior to attending a virtual session. Course materials will be available for download via the online learning platform.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

The virtual 6-hour certification course is a blended course that includes two hours of self-directed pre-work and four hours of instructor led training. Customer will ensure that there are 15 identified participants for registration that are committed to completing required online learning pre-work and attending the four hours of instructor led training. Course materials will be available for download via the online learning platform.

If registered participant(s) does not complete the required two hours of self-directed pre-work, the participant(s) will be denied access to the four hours of live facilitator led training. If a participant doesn't complete the pre-work or is not able to attend the instructor led portion of the course, participants will not be able to makeup the session or receive certification and no refund will be issued. Participants will only receive a certificate upon completion of post test and evaluation.

6. **CRITICAL INCIDENT SUPPORT (Crisis Support/Management Services/Critical Incident Stress De-Briefing (CISD) Services):** An array of services offered by the EAP that helps an organization to prepare for, prevent, or respond to traumatic events. Acts of war are excluded from on-site CISD Services.
 - **ON-SITE STANDARD CRITICAL INCIDENT SUPPORT:** On-site attendance response time in greater than three hours for hourly onsite crisis support and Critical Incident Stress De-Briefing (CISD) Services at Customer sites to help an organization prepare for, prevent, or respond to traumatic events.
 - **ON-SITE IMMEDIATE CRITICAL INCIDENT SUPPORT:** On-site attendance response time in less than three hours for hourly onsite crisis support and Critical Incident Stress De-Briefing (CISD) Services at Customer sites to help an organization prepare for, prevent, or respond to traumatic events.
7. **REDUCTION IN FORCE:** The process by which a work organization reduces its work force by eliminating jobs, such as closing subsidiaries or departments.
8. **COMMUNICATION AND PROMOTIONAL MATERIALS:** Information provided to Employees and management about EAP Services, including, in part, how EAP Services can be accessed for consultation and assistance. The communications and promotional resources include template e-mails, letters, flyers, brochures, and/or posters for Employees and management. Company will provide communications and promotional materials, directly to the Customer for distribution to the Employee. In support of implementation and on-going communication, Company will provide a quantity up to 120% of the number of eligible Employees for flyers or brochures with perforated wallet card; a quantity up to 5% of the number of eligible Employees for posters; and a quantity of up to 20% of anticipated attendees at health fairs for flyers. Requests exceeding these quantities may incur an additional fee. Requests for a mailing, to all Employee's place of residence, will incur additional fees. Requests for materials outside of our standard templates will incur an additional fee.
9. **MANAGEMENT REPORTS:** A specific collection of data and narrative information designed to inform the Customer about the overall utilization of the program. Customer may receive reports on a quarterly electronic basis. If for any 2 consecutive reporting periods there is less than 1% utilization, reporting frequency will default to annual reporting.
10. **INTAKE MODEL:**
 - **STANDARD MODEL:** Initial intake calls answered by a member engagement specialist.
11. **EAP EXCLUSIONS:** The following services are outside the scope of the EAP:
 - Counseling services beyond the allowed number of sessions covered by the EAP benefit.
 - Court ordered treatment or therapy, or any treatment or therapy ordered as a condition of parole, probation, custody, or visitation evaluations, or paid for by Workers' Compensation.
 - Formal psychological evaluations which normally involve psychological testing and result in a written report.
 - Diagnostic testing and/or treatment.
 - Visits with psychiatrist, including medication management.
 - Prescription medications.
 - Services for remedial education.
 - Inpatient, residential treatment, partial hospitalizations, intensive outpatient.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

- Ongoing counseling for a chronic diagnosis that requires long term care.
- Biofeedback.
- Hypnotherapy.
- Aversion therapy.
- Examination and diagnostic services required to meet employment, licensing, insurance coverage, travel needs.
- Services with a non-contracted EAP provider.
- Fitness for duty evaluations.
- Legal representation in court, preparation of legal documents, or advice in the areas of taxes, patents, or immigration, except as otherwise described in this document.
- Investment advice (nor does plan loan money or pay bills).

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT**DESCRIPTION OF WORKLIFE SERVICES ADDENDUM**

Subject to the terms and conditions of this Services Agreement, the WorkLife Services selected by Customer and provided by Company are reflected in this **Description of WorkLife Services Addendum** and the **Domestic EAP Service and Fee Schedule**, (as modified by Company from time to time pursuant to Section 3 of the **General Conditions Addendum**). Additional WorkLife Services may be provided at Customer's written request under the terms of this Services Agreement. All Services described in this Worklife Services Addendum are available within the 50 U.S. states only, including Puerto Rico, U.S. Virgin Islands, and District of Columbia. International EAP Services are only available if specifically described and priced in a separate International Service and Fee Schedule.

1. UNLIMITED TELEPHONIC ACCESS: Unlimited telephonic access to the call center staff, available 24 hours per day, 7 days per week, 365 days per year.

2. CAREGIVING SERVICES: Services that include consultation, information, education and referral services in connection with, in part, adoption, childcare, parenting, temporary back-up care, summer care, special needs, high-risk adolescents, academic services, education loans, grandparents as parent, adult care, elder care, and disaster resources. Carekits may be available upon request from individual Members within the 50 U.S. states only, other types of Carekit distribution or promotion request by Customer will incur additional fees.

3. PERSONAL SERVICES: Free educational materials, personalized referrals, and interactive web tools to assist with:

- Health & Wellness--Children's health; women's health; men's health; seniors' health; weight loss and nutrition; fitness and exercise programs; general health; safety; stress management; information on diseases and conditions; and more.
- Daily Life--Home improvement; pet care; consumer information; automotive services; relocation; travel; time management; cleaning services; and more.

4. LEGAL SERVICES: Services provided through the EAP that include:

- ½ hour Initial Consultation with selected participating attorney on an unlimited number of new Legal Topics (each plan year). Certain topic areas are excluded, including employment law. Also excluded are matters that, in the attorney's opinion, lack merit. Court costs, filing fees and fines are the responsibility of the member. If members choose to continue with the participating attorney and hire that attorney on their own, they will receive 25% off of the fees for services beyond the initial consultation (excluding flat legal fees, contingency fees, and plan mediator services).
- Mediation Services – Each member is entitled to one (1) initial thirty minute office or telephone consultation per separate legal matter at no cost with a participating mediator. In the event that the member wishes to retain a participating mediator after the initial consultation, they will be provided with a preferred rate reduction of 25% from the mediator's normal hourly rate. Typical matters may include divorce and child custody, contractual and consumer disputes, real estate and landlord tenant, car accidents and insurance disputes.
- Simple Will Preparation: Members receive resources to complete one Simple Will.
- All initial consultation (and discounted consultations) must be for legal matters related to the Employee and eligible household members.
- Member web resources

5. FINANCIAL SERVICES: Services provided through the EAP that include:

- ½ hour Initial Consultation with the selected participating financial counselor on an unlimited number of new Financial Counseling Topics each plan year.
- Financial counseling topics include Budgeting, Credit, Debt, Retirement, College Planning, Buying vs. Leasing, Mortgages/Refinancing, Financial Planning, Tax Questions, Tax Preparation, IRS Matters, Tax Levies and Garnishments, Consumer Credit Counseling, and Community Services.
- A discount of 25% off the tax preparation services.
- Individual Employees may have the option to purchase additional services for a monthly nominal fee.

6. IDENTITY THEFT SERVICES: Services provided through the EAP that include:

- 1-hour telephonic fraud resolution consultation for Identity Theft.
- Coaching and direction on prevention and restoring credit for victims of Identity Theft.
- Free Identity Theft Emergency Response Kit for victims of Identity Theft.
- Individual Employees may have the option to purchase additional services for a monthly nominal fee.

7. MEMBER WEBSITE:

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

CORE MEMBER WEBSITE: Access to customizable member website for free webinars, online worklife searches, concierge database, discount program, thousands of articles, videos, and tools on worklife and behavioral health topics.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT**DOMESTIC EAP SERVICE AND FEE SCHEDULE**

Customer hereby elects to receive Services, within the 50 U.S. states only, including Puerto Rico, U.S. Virgin Islands, and District of Columbia, as designated below. The below Service Fees shall be in effect for the first three (3) years of this Services Agreement, beginning upon the Effective Date of this Services Agreement, and, thereafter, if this Services Agreement is extended by the parties for any additional successive one year term(s), such Service Fees may be revised for each such successive term. Notwithstanding the immediately preceding sentence, the below Service Fees shall be amended by Company, from time to time during the first three (3) years of this Services Agreement and for any future period(s) thereafter, in accordance with the terms of this Domestic EAP Service and Fee Schedule.

Services	Service Fees
<p>EAP Session Model</p> <p>Unlimited Telephonic Access</p> <p>with</p> <p>Up to 5 counseling sessions with an EAP Network Provider or televideo provider, delivered via face-to-face, telephonically, televideo, or online chat* per problem per contract year</p> <p>*One week of online chat counseling messages are equal to one EAP session.</p>	<p>\$2.60 PE/PM</p>
<p>Worklife Services, including Caregiving Services, Personal Services</p> <p>Legal and Financial Services</p> <p>Identity Theft Services</p> <p>Core Member Website</p>	<p>Included in the EAP Session Model PE/PM.</p>
<p>Intake Model</p> <p>Standard Model</p>	<p>Included in the EAP Session Model PE/PM.</p>

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

Services	Service Fees
<p>Critical Incident Support/Critical Incident Stress De-Briefing (CISD) Services—Standard Services (On-site attendance response time in greater than 3 hours)</p>	<p>Unlimited Standard CISD Services: Unlimited Standard CISD sessions are included in the EAP Session Model PE/PM Rate. CISD Services are limited to 10 hours per incident. Immediate CISD's are subject to the fees described below. Issues concerning downsizing, mergers, acquisition activities (i.e. Reductions in Force or RIF's) or services beyond the 10 hour cap, are subject to the hourly rate of \$285.00 per hour plus travel and preparation expenses reimbursed at a flat rate of \$180.00 per counselor.</p> <p>CISD hours used, whether fee for service and/or within the bank of standard hours, are calculated based upon the combined total number of hours all clinicians are on-site.</p>
<p>Critical Incident Support/Critical Incident Stress De-Briefing (CISD) Services—Immediate Services (On-site attendance response time in 3 hours or less)</p>	<p>Fee for Service Immediate CISD Pricing: \$385.00 per hour plus travel and preparation expenses reimbursed at a flat rate of \$180.00 per counselor.</p> <p>CISD hours used, whether fee for service and/or within the bank of standard hours, are calculated based upon the combined total number of hours all clinicians are on-site.</p>
<p>Critical Incident Support/Critical Incident Stress De-Briefing (CISD) Cancellation Fee</p>	<p>Whenever possible, Customer agrees to provide Company with 48 hours advance notice of cancellation of any requested Workplace Crisis Response Services. Failure to provide Company with 48 hours' notice of cancellation of any services:</p> <ul style="list-style-type: none"> • Unlimited Standard CISD Services Cancellation Fee: Services which are excluded from the unlimited provision listed above, i.e. above the 10 hours per incident cap, immediate CISD services, downsizings, mergers, acquisition activities (i.e. Reductions in Force or RIF's) which are subject to the hourly rate, will result in a charge of \$440.00 per incident.
<p>Reduction in Force</p>	<p>Fee for Service Reduction in Force Pricing: \$285.00 per hour plus travel and preparation expenses reimbursed at a flat rate of \$180.00 per counselor.</p>
<p>Reduction in Force Cancellation Fee</p>	<p>Reduction in Force Cancellation Fee: \$440.00 per incident charge for failure to provide Company with 48 hour notice of cancellation of Reduction in Force service.</p>

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

Services	Service Fees
Training and Education	<p>Bank of Training Hours: 50 hours of Training and Education are included in the EAP Session Model PE/PM Rate. Training and Education services may be on-site, or for web-based seminars up to 50 participants. For webinars with more than 50 participants, an additional charge of \$25.00 applies for each additional 25 participants up to a maximum of 200 participants. Additional Training and Education sessions are \$250.00 per hour for the total amount of time that the educator is on site, plus a \$150.00 per hour charge for travel and preparation time. If training is not scheduled consecutively or multiple topics are scheduled, additional travel and preparation costs may apply or additional hours may be deducted from the bank. These capitated hours will be used for the total amount of time that the educator is on site.</p> <p>Sessions less than one (1) hour in duration will count as one (1) hour of Training and Education.</p> <p>If Customer requests a specific educator, or an educator with specific qualities, including but not limited to specialized certifications, experiences or language, Customer will be billed any additional incurred fees beyond the hourly fee above or have hours deducted from bank.</p> <p>In addition, if Customer cannot accommodate the schedule/availability of a local Company contracted educator, requiring that the services of an educator 50 miles away or greater from the Customer location is necessary, then Customer will be billed any additional incurred fees beyond the hourly fee above or have hours deducted from bank.</p>
Training and Education Cancellation Fee	<p>Failure to provide Company six (6) business days' notice of cancellation of a previously scheduled training program may result in a charge of:</p> <ul style="list-style-type: none"> • Bank of Training Hours Training Cancellation Fee: Services which are included in the bank of capitated hours described above, will result in the deduction of a number of hours from the bank, equal to the number of cancelled hours. When the bank of hours has been exhausted, fee for service training cancellation fee of \$375.00 per hour applies.
Mental Health First Aid Training	<p>Please contact your Account Executive for Mental Health First Aid pricing should you require these services.</p> <p>Corporate Level <i>6-Hour Course In-Person (30 participant maximum)</i></p> <ul style="list-style-type: none"> - This option provides six (6) hours of standard Mental Health First Aid curriculum. Fee includes all instructor fees, travel, and customization for delivery locations within continental United States. Additional travel and expenses may apply for delivery locations in Alaska and Hawaii.

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

Services	Service Fees
	<p><i>4-Hour Course In-Person (30 participant maximum)</i></p> <ul style="list-style-type: none"> - This option provides four (4) hours of standard Mental Health First Aid curriculum. Fee includes all instructor fees, travel, and customization for delivery locations within continental United States. Additional travel and expenses may apply for delivery locations in Alaska and Hawaii. <p><i>6-Hour Course – two hours self directed preparation + four hours instructor led training Virtual (15 participant minimum and maximum)</i></p> <ul style="list-style-type: none"> - This option provides six (6) hours (2 hours self-directed pre-work + 4 hours of instructor led training) of standard Mental Health First Aid curriculum. Fee includes all instructor fees and customization. <p><i>4-Hour Course Virtual (Minimum of 15 participants and Maximum of 25 participants)</i></p> <ul style="list-style-type: none"> - This option provides four (4) hours of standard Mental Health First Aid curriculum. Fee includes all instructor fees and customization. <p>Mental Health First Aid Cancellation Fee Schedule If the Customer cancels for any reason within 30 days from the training date, the Customer will be responsible for cancellation fees as follows:</p> <ul style="list-style-type: none"> • 50% of the total fee 15-30 days prior to the scheduled date of training. • 100% of the total fee 0-14 days prior to the scheduled date of training. <p>Rescheduling Fee: 25% of the total fee 0-30 days prior to the scheduled date of the training.</p>
<p>Here4U Events</p>	<p>Fee for Service Here4U Event: \$700 per event per hour. Here4U event has a maximum capitation of 25 participants (Participant is defined as one individual logging into web-based platform). Rates are viable for 1 contract year</p> <p>Failure to provide Company six (6) business days’ notice of cancellation of a previously scheduled Fee for Service Here4U event will result in a charge of:</p> <ul style="list-style-type: none"> • Fee for Service Here4U Cancellation Fee: \$550.00 per hour for services which are provided on a fee for service basis and which are subject to the hourly rate. <p>Requests made to reschedule an event will be treated the same as a cancellation if not providing the sufficient six business days’ notice. Please speak with your Account Executive if you have any questions regarding cancellation fees.</p>
<p>Drug Free Workplace Services</p>	

EMPLOYEE ASSISTANCE PROGRAM SERVICES AGREEMENT

Services	Service Fees
Substance Abuse Case Management by a Substance Abuse Professional (SAP) and/or for Department of Transportation regulation compliance and DOT training to meet Drug-Free Workplace regulations regarding drug and alcohol awareness	\$750.00 per case and DOT Alcohol and Drug-Free Workplace for Supervisors Training to meet Drug-Free Workplace regulations regarding drug and alcohol use. Additional fees may be added on to the base rate for DOT training. These fees will be assessed on a case-by-case basis and are dependent upon travel expenses and for classes that exceed 50 participants. • DOT Supervisor Training - 2 hours at \$800 DOT Alcohol and Drug-Free Workplace for Employees Awareness Training (Note: this training does not meet Drug-Free Workplace regulations regarding drug and alcohol use.) Additional fees may be added on to the base rate for DOT training. These fees will be assessed on a case-by-case basis and are dependent upon travel expenses and for classes that exceed 50 participants. • DOT Employee Training - 1 hour at \$400
Additional Services Customer may elect to add on January 1 of each year of the contract:	
Bank of Additional 50 training hours	+\$0.29 PEPM
Bank of Additional 150 training hours	+\$0.89 PEPM
Provider Placement	+\$0.20 PEPM
Live Well Tobacco Free	+\$0.50 PEPM
Home mailing	+\$0.60 PEPM

Company also may adjust Service Fees effective as of the date on which any of the following occurs.

- (1) If, for any Service, there is a 20% change in the number of Employees from the number of Employees assumed in Company's quotation as of the Effective Date of this Services Agreement.
- (2) Change in Services—A material change in Services is requested or initiated by the Customer or by legislative action.
- (3) Premium Taxes or Assessments—If legislative or regulatory action results in the assessment of premium taxes or other like charges as it concerns those Services provided under the terms of this Agreement.