



THE CITADEL

Solicitation Number	RFP 24005-JM
Addendum #	1
Date Issued	11/28/2023
Procurement Officer	Jeff Molloy
Phone	843-953-6873
E-Mail Address	procurement@citadel.edu

SOLICITATION TITLE: Employee Assistance Plan

TYPE OF ADDENDUM:

- X Change or clarification to the Solicitation's specifications, requirements, or scope of work.
- X Questions posed regarding the Solicitation and their respective answers by The Citadel.

Questions and Answers

The Citadel Responses are in Blue.

1. How long has the current vendor provided EAP services to The Citadel?

Since 02/01/2019

Are there specific areas of enhancement you are seeking currently? **We would like to increase employee engagement, client/provider relations (more input and interaction from the provider on promoting EAP and its resources based on data trends, and supporting our leadership, supervisors and managers to improve overall wellbeing and employee relations on our campus.**

What is The Citadel currently paying for their EAP services? **Under \$10,000 annually**

- Based on how many employees? **1000**
- Based on what session model? **3-session model**

2. What was the total dollar spent for the EAP in the most recent contract year? **\$9,998.00**

3. We recognize The Citadel provided some utilization information in Appendix A, but there is no information regarding what is included within the reported cases. Based on The Citadel's earlier shared utilization % of approximately 2%, we would like to gain more insight/clarity, as the numbers in Appendix A would seem to indicate a rate higher than 2%. Can you provide recent utilization reports or provide the following specific utilization statistics? **Utilization Reports are attached below.**

- Specifically, can you provide total number of initial inquiry/assessment calls to the EAP in the most recent contract year? **Refer to most recent utilization reports**
- Can you provide the total number of EAP counseling cases in the most recent contract year?
Refer to most recent utilization reports
- Can you provide the total number of EAP counseling sessions provided in the most recent contract year? **Refer to most recent utilization reports**
- Can you provide the total number of EAP counseling sessions provided in the prior contract year?
Refer to most recent utilization reports
- Can you provide the average number of EAP counseling sessions provided per counseling case in the most recent contract year? **Refer to most recent utilization reports**
- If unable to provide response to above points, could more detail be shared regarding Appendix A? **Refer to most recent utilization reports** Example what is all being counted in the 35 cases from 2022, please provide a breakdown.

4. Can you provide the number of orientation, training, benefit fair hours provided in the most recent contract year? **4 hours** How many of those hours were provided in-person? **4 hours**

- How many hours are included annually in the current contract? **4 contract hours**
- Are include hours part of a bundle or per type of event? Please share details. **Up to 4 hours of onsite training per year which includes EAP employee orientation, EAP supervisor orientation/training, EAP core training and compliance training. Unused hours do not carryover.**

5. How many Critical Incident events were responded to in the most recent contract year? **0**

6. How many Critical Incident events were responded to in the prior contract year? **0**
7. How many hours of Critical Incident support were provided in the most recent contract year? **0**
8. How many hours of Critical Incident support were provided in the prior contract year? **0**
9. How many hours of on-site Critical Incident support are currently provided in the contracted rate? **Up to 3 consecutive hours of onsite critical incident response is included per calendar year**
10. In an effort to be a “green” company, we generally provide promotional materials electronically. If printed materials are desired, how many printed brochures and how many printed posters are requested annually? Our request for printed materials are minimal annually since we, too, prefer electronic promotional materials. **We normally receive approximately 500 printed brochures and wallet cards, but very few posters (less than 20) annually.**
11. What hours is the Citadel open for receipt of the proposal from FedEx?
The Procurement office is open at 8:00 a.m. and deliveries are not accepted after 2 p.m. The physical address, date and time requirements are listed in the RFP.
12. Regarding the requirement of hardcopies:
 - With our ongoing green efforts, we try to reduce our footprint as much as possible, and therefore would like to ask if this requirement could be reduced or moved to entirely being electronic?
No, please submit as required in the RFP
 - Do you have specific requirements regarding binding if hard copies remain required? Example would a three-ring binder be acceptable?
Three ring binder is acceptable.
13. Can more information be shared regarding the 300 temporary employees, such as:
 - When do the majority of them work (during the year)? **Schedules do vary; some work 9 months (adjuncts) and others work year-round. Our business hours are Monday-Friday 8:30a-5:00p except summer months, we are on a 4-day work schedule (Monday-Thursday 7:30a-5:30p)**
 - How many hours do they average when working per week? **25 – 30 hours**
 - What is the turnover rate throughout the year? **Currently our turnover rate is under 20%**
 - What type of roles do they fulfill? **Adjuncts, and various staff roles as admin support or program coordinators**
14. From Background – Program Requirements – “The Citadel has roughly 600 full-time, benefits eligible employees and approximately 300 temporary employees. We would like to receive a quote that would differentiate number of visits for a population of around 900 employees.” - Can more specifics be provided here, such as:
 - Are you looking for different session models? **The Citadel is open to for multiple number of sessions per incident, some vendors may offer three sessions and some may offer a different number of sessions per incident. The incident price will be divided by the number of sessions to determine the evaluated session cost which will aid in determining the awarded vendor. Please refer to the bid schedule and do not provide a different bid schedule in your response.**
 - Are you seeking different session models for full-time vs. temporary? **No**
 - Something else? **No**
15. Regarding “1.6. Counseling must also be provided on campus in the event of an emergency as determined by The Citadel.” – Please confirm that this would be in connection with an approved critical incident response/critical incident stress debriefing. **Yes**
16. Regarding “1.11 When maximum # of visits has exhausted, program should include telephonic consultations on an unlimited basis for eligible employees.”
 - We provide unlimited access to the EAP benefit via the toll-free number; however this does not imply unlimited counseling, please confirm that telephonic counseling in this requirement refers to in-the-moment type support and general inquiry. **Yes**
17. Regarding “1.13 Provide a cab reimbursement for employees at least once a year”

- Is this currently in place? **No, this is preferred not mandatory.**
 - Can annual utilization detail be shared? **N/A**
18. Regarding 2.1 – “DOT drug and alcohol training” how many trainings are provided annually, and is it in-person or virtual? **0- it is included as part of our current EAP contract as compliance training** Also, how long is this training typically? **Based on need and content- no more than 4 hours for onsite training**
19. Regarding 2.5 – “and/or drug and/or alcohol screenings and testing.”
- Drug and/or alcohol screenings and testing are not typically conducted by an EAP, but rather by a medical lab. Are these being conducted today by the EAP? **No**
 - If yes, is this actually the new-hire/reasonable suspicion screening/testing or some other type of screening/testing? **N/A**
20. Regarding “3.4 Must provide a Quality Assurance Plan that ensures quality of services provided.”
- Can the Citadel provide details on the current Plan, or share more insight into expectations? **Quality assurance is monitored on an on-going basis and is evaluated through employee feedback and review of utilization reports. Vendor shall have a quality assurance plan in place to ensure EAP effectiveness.**
21. Regarding “3.5 If and where applicable, provide collaborative efforts on health and wellness incentives for overall stress and conflict management.”
- Are these in place today through the EAP vendor? **No, but this is a task The Citadel would prefer to explore**
 - Are they included in the EAP rate, and if not, how are these being charged? **N/A**
Can examples of those in place or desired be shared? **N/A**
 - How is tracking being done, or expected to be done? **N/A**
 - Regarding Technical Proposal section – “The resolution rate for the proposed number of sessions” – this could mean different things; can The Citadel provide more insight into what it wants to learn in regard to this item? **The Citadel would like to review and follow resolution rates in order to evaluate the EAP effectiveness. The Citadel wants to confirm the EAP is addressing staffing needs and requirements that allow improvements in the employee’s overall health and well-being.**
22. Regarding Technical Proposal section – “The number and name of providers per county in South Carolina and the maximum driving distance”
- Could details be limited to Charleston County? **We prefer all counties in South Carolina**
 - Regarding driving distance, from where to where (what is the constant that should be used for starting point, the campus address)? **Campus address to providers’ office location, Citadel staff and their family members live in multiple parts of the state and may live out of state.**
23. Regarding Technical Proposal section – “The resource capability to provide services, face-to-face consultations in South Carolina, but nationwide as well through telephonic consultations on secure web communications based on historical data, Appendix A - Face-to-Face Visits for Employees and Eligible Dependents.
- Not understanding what is meant by/asked for in regard to “based on historical data”, can more information be shared? **Based on historical data and utilization reports The Citadel wants to confirm the proponent has the resources required to meet Citadel staff needs.**
24. Regarding Cost Proposal – “2. Includes on-line wellness coaching program and related wellness services and minimum Program Requirements listed on page 14.” – We are not finding a listing of wellness services, unless this refers to the listing related to short term counseling on page 14. Can more detail/clarity be provided? **The Citadel needs to ensure that the proponents overall wellness services will meet staffing and family requirements. Page 14 provides an outline of mandatory requirements; however, The Citadel does not want to limit the proponent's wellness service offering. Vendors are free to offer all the services they provide above and beyond this list.**

25. Due to the length of audited financials, can these be limited to being included in one copy only, or simply be provided in the electronic USB file?
No, all copies must include the required documents.
26. Please verify if you want Work-Life Resources and Legal and Financial Services included in the pricing.
Yes – we currently have WLR and LFS with our current EAP provider.
27. Page 15 1.11 – Please elaborate on what you mean by “consultations.” **Same as evaluation – falls under assessment, counseling and treatment.**
28. Please clarify the number of training hours you would like included in the program. Please describe type of training desired as well. **4 hours of onsite training per year (EAP core training, supervisor training, and compliance training)**
29. Pg 15 2.4 – Please elaborate on what your expectation is around “Train the Trainer” as well as the types of training (customized training, manager orientations, etc.). **Training support, supervisor training**
30. Pg 16 – “Optional Programming” – it’s a little confusing re: wellness coaching. Please verify how you want us to address this additional benefit. **Wellness Coaching is a desired additional service to employees, as it relates to financial wellness, for example.** There is no mention of where to include Wellness Coaching in the technical proposal. Are we to recreate the cost proposal and add Wellness Coaching? **No, do not recreate the cost proposal. Respondents should include wellness coaching in their offering, if provided.**
31. Where did the 2% utilization number originate from? **From our most current UR report- current EAP Provider shows 2.40% UR for count and 2.80% for serviced** As the incumbent, we thought it relevant for us to correct the utilization number listed in the RFP so that pricing is accurate. The average EAP utilization for the past five years is 3.4%, with current utilization trending at 3.7%. This also does not consider Work-Life utilization which is currently trending at 24.5%. **Correct, the utilization was in excess of 2% to be exact.**
32. Who is the current EAP provider and how long have they been providing services to the organization?
MyGroup- 4 years (since February 1, 2019)
33. Please provide the current rate and a rate history throughout the contract term for the EAP. **The current annual rate is \$9,998.00 annually.**
34. How many hours of the following services are included within the current EAP contract per year? **4 hours for training (combined hours for all services below)** •Onsite training/orientation/educational seminars •Onsite health fair/event participation •Onsite critical incident support events (# events/# hours) •Webinar training
35. How many total hours of the following services were utilized in each of the last two (2) years? **4 hours for onsite and virtual training and event participation over the last two years** •Onsite training/orientation/educational seminars •Onsite health fair/event participation •Onsite critical incident support events (# events/# hours) •Webinar training
36. Please provide copies of 2021 and 2022 EAP utilization reports. **Utilization Reports are attached below.**
37. If reports are not available, please provide the following for each of the last 2 years and YTD: **refer to utilization reports** •Number of employees on which the report is based •Total number of clinical cases •Total number of work-life cases •Total number of clinical sessions
38. On a scale of 1-5 with 5 being the highest, how would you rate your current vendor? **3**
39. What are the three components that are most important to you in an EAP? **Employee education and engagement, an organizational resource and support for our supervisors, managers, etc., and providing short term counseling and assessment to our workforce**
40. Is your workforce currently in-office, remote, or hybrid? **In office**
41. How many employees covered under the EAP fall under Department of Transportation (DOT) regulations?
No employees currently fall under DOT regulation.

42. Are DOT Substance Abuse Professional (SAP) evaluations included within the EAP contract? **We currently have it in our current contract.** If yes, is there a cap on the number of evaluations included each year within the EAP rate or are evaluations provided on a fee-for-service basis? **We have not used this service**
43. How many Department of Transportation (DOT) Substance Abuse Professional (SAP) evaluations have been requested in each of the last three years? **None**
44. Please provide insight into the condition of the workforce. Are your employees facing:
•Stress?•Morale?•Inflation?•Financial challenges?•Burnout? **Our workforce is currently facing all of these conditions sporadically dependent on life events.**
45. How do you utilize EAP in managing employee health and well-being? **We offer onsite trainings, access to resources, such as webinars, legal and financial forms, attorney consultations, just to name a few.**
46. How do you currently track the effectiveness of the EAP program? **We create trainings, newsletters and programs based on utilization reports from our current EAP provider.**
47. How do you currently track and manage contract compliance? **We use utilization reports and continuous communication with our current EAP provider to determine compliance.**
48. Have there been any major events in the last year (i.e. reductions in force, critical incidents, etc.)? **None**
49. Is your EAP Helpline currently answered by customer service representatives or by clinical personnel? **Clinical personnel**
50. Are legal, financial and daily living work/life services currently a part of your EAP program? **Yes**
51. What will be required of the clients we list as references? Will you conduct a telephone interview, require a written reference response, etc.? A written reference response- **References will be contacted to obtain feedback of the vendors service quality.**
52. Who is your health plan provider and is the plan self-funded? Blue Cross and Blue Shield of South Carolina- **Yes, we have a self-funded plan.**
53. "It is expected that Covered Individuals (including dependents and household members) in need of simultaneous psychiatric care be assisted with acquiring those services during the time frame in which the counseling is provided." Is this to be interpreted as the EAP is responsible for providing psychiatric care through the EAP, or is this referencing a referral to psychiatric care outside of the EAP, through insurance, if available? **No, A referral to psychiatric care outside of EAP through private insurance plans is expected.**
54. "Counseling must be offered via a variety of methods including: 24-hour toll-free telephone access (24/7), in-person within 24-72 hours after request, virtually, and referrals as needed, follow-up within 72 hours." Are these timelines an absolute requirement? **This is a Mandatory requirement** Ours differ slightly and we would like to know if that would be an automatic disqualifier from further consideration if we do not meet these exactly.
55. "When necessary, psychiatric care should be assisted with the EAP provider for adequate care and treatment of the eligible employee, dependent or household member." Is the psychiatric care expected to be provided through the EAP as part of the counseling sessions, or is this referring to referrals for psychiatric care outside of the EAP? **No, A referral to psychiatric care outside of EAP through private insurance plans is expected.**
56. Drug and/or alcohol screenings and testing: Are these included in the current rate or provided on a fee for service basis? **No, alcohol and drug screening are not presently part of the EAP**
57. "If and where applicable, provide collaborative efforts on health and wellness incentives for overall stress and conflict management." What incentives are expected to be provided? Does the current EAP provider provide incentives? If so, what are they? **Current provider is not currently providing any additional incentives. However, The Citadel would like a provider that offers them. The Citadel does not anticipate a vendor providing any financial incentives for health and wellness but does prefer a vendor to provide initiatives to incentivize staff toward better health and well-being.**
58. Is the wellness coaching program included in the current rate or is this a separate charge? **No, not currently covered in the current agreement however, it is a desired service to be included if offered.**

59. Is there a Minority Business subcontracting goal? If so, what is it? Is it a requirement to meet that goal or is a good faith effort sufficient? **Yes, the State mandates that all state agencies meet a 10% goal of its discretionary spend annually with State Certified MBE contractors or subcontractors. This is not a mandatory requirement and an award will be made according to the RFP guidelines.**
60. Is a Psychiatrist (MD) required to be on staff or in network? **No, refer to questions 54 and 56 responses.**

QUESTIONS FROM OFFERORS - AMENDMENT (JUN 2017)

THE SOLICITATION IS AMENDED AS PROVIDED HEREIN. INFORMATION OR CHANGES RESULTING FROM QUESTIONS WILL BE SHOWN IN A QUESTION-AND-ANSWER FORMAT. ALL QUESTIONS RECEIVED HAVE BEEN REPRINTED BELOW. THE "STATE'S RESPONSE" SHOULD BE READ WITHOUT REFERENCE TO THE QUESTIONS. THE QUESTIONS ARE INCLUDED SOLELY TO PROVIDE A CROSS-REFERENCE TO THE POTENTIAL OFFEROR THAT SUBMITTED THE QUESTION. QUESTIONS DO NOT FORM A PART OF THE CONTRACT; THE "STATE'S RESPONSE" DOES. ANY RESTATEMENT OF PART OR ALL OF AN EXISTING PROVISION OF THE SOLICITATION IN AN ANSWER DOES NOT MODIFY THE ORIGINAL PROVISION EXCEPT AS FOLLOWS: UNDERLINED TEXT IS ADDED TO THE ORIGINAL PROVISION. STRICKEN TEXT IS DELETED. 02-2A097-1]

☒ Other Change: Describe

DESCRIPTION OF CHANGES:

Award Date has been changed to Tuesday, December 19, 2023.

IMPORTANT NOTICE:

☒ Contractor is required to acknowledge receipt of this Addendum by signing below and returning a copy with its Offer.

Except as provided herein, all terms and conditions of the Solicitation referenced above remain unchanged and in full force and effect.

SIGNATURE OF PERSON AUTHORIZED TO EXECUTE ON BEHALF OF OFFEROR

Signature: _____

Printed Name & Title: _____

Company Name: _____

Date: _____



UTILIZATION REPORT

The Citadel

01/01/2021 - 12/31/2021



UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021 on New and Open Files

UTILIZATION BY THE NUMBERS

Utilization Summary	Count	%	Serviced	%	Activities	%	Hours
Cases	31	70.5%	35	89.7%	73	64.6%	40.18
Information Calls	0	00.0%	0	00.0%	0	00.0%	0
Organizational Services/Critical Incident	9	20.5%	0	00.0%	8	07.1%	5.5
SAP/Student Assistance Cases	0	00.0%	0	00.0%	0	00.0%	0
Formal Management Referrals	3	06.8%	3	07.7%	31	27.4%	8.17
Management Consultation	1	02.3%	1	02.6%	1	00.9%	0.33
Total	44	100%	39	100%	113	100%	54.18

Count	Serviced	Activities	Hours
The total number of Cases, Information Calls, Organizational Services, etc. that have an open/service date that falls between (and includes) the reporting period date range.	The total number of service users (attendees) within Cases or Organizational Services that have an open/service date that falls between (and includes) the reporting period date range.	The total activities (contacts) from Cases, Information Calls, Organizational Services, etc. that have an activity date that falls between (and includes) the reporting period date range.	The total duration from all activities that have an activity date that falls between (and includes) the reporting period date range.

Utilization Rates Based on a weighted population of: 1000

Period Rate (Utilization Rate)

The total number of Cases, Information Calls, Critical Incidents, Formal Management Referrals, and Management Consultations, divided by the weighted employee population for the reporting period. Period Rate does not include Organizational Services Count or Serviced.

Period Rate (Count):	3.50%
Projected Annual Rate (Count):	3.50%
Period Rate (Serviced):	3.90%
Projected Annual Rate (Serviced):	3.90%

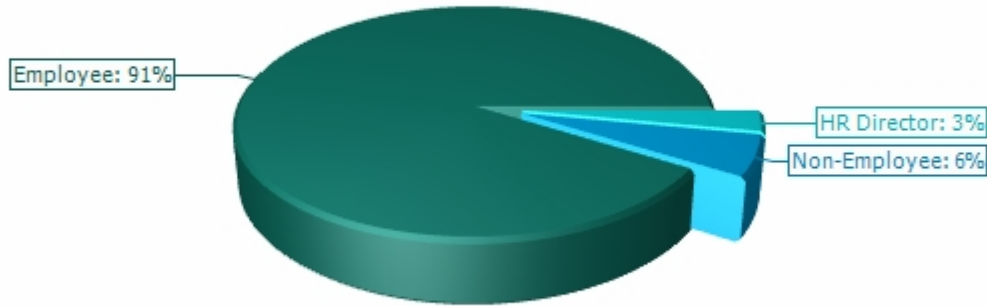
New/Ongoing Case Summary		Closed Case Count	
Total New Files	33	Total Files Closed	27
Total Open Files At 1/1/2021	2		
Total Open Files At 12/31/2021	8		
Total Files To 12/31/2021	101		

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Client Type



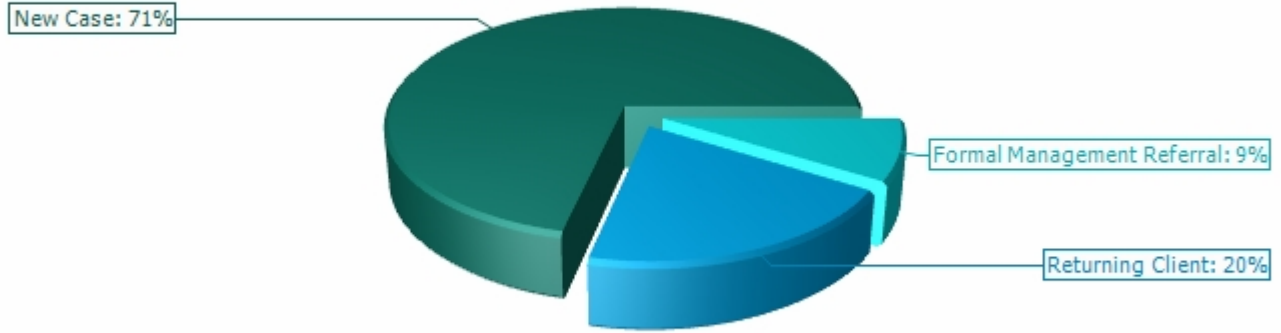
Client Type	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
Employee	9	90.00%	11	91.67%	12	92.31%	15	93.75%	32	91.43%	22	95.65%
HR Director	0	0.00%	0	0.00%	1	7.69%	0	0.00%	1	2.86%	0	0.00%
Non-Employee	1	10.00%	1	8.33%	0	0.00%	1	6.25%	2	5.71%	1	4.35%
Total	10	100%	12	100%	13	100%	16	100%	35	100%	23	100%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Case Status



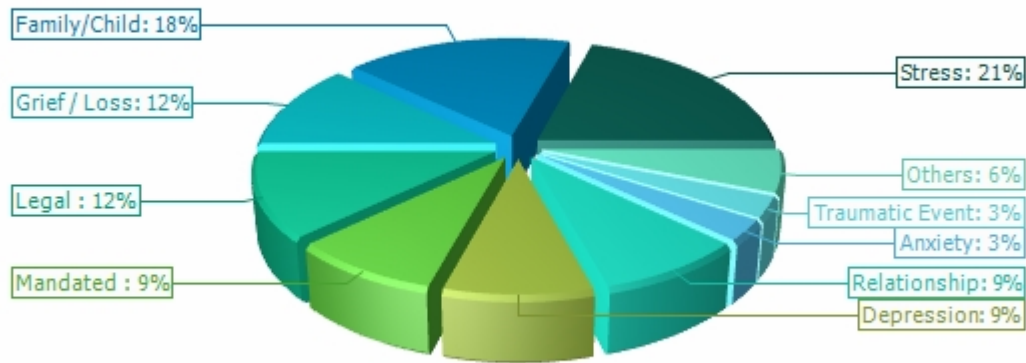
Case Status	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
Formal Management Referral	0	0.00%	1	8.33%	1	7.69%	1	6.25%	3	8.57%	0	0.00%
New Case	9	90.00%	9	75.00%	9	69.23%	11	68.75%	25	71.43%	17	73.91%
Returning Client	1	10.00%	2	16.67%	3	23.08%	4	25.00%	7	20.00%	6	26.09%
Total	10	100%	12	100%	13	100%	16	100%	35	100%	23	100%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Primary Presenting Problem



Primary Presenting Problem	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
Anxiety	0	0.00%	0	0.00%	0	0.00%	1	6.25%	1	2.94%	1	4.35%
Couples	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	4.35%
Depression	0	0.00%	1	8.33%	2	16.67%	1	6.25%	3	8.82%	3	13.04%
Family/Child	4	40.00%	1	8.33%	2	16.67%	2	12.50%	6	17.65%	4	17.39%
Grief / Loss	1	10.00%	1	8.33%	1	8.33%	2	12.50%	4	11.76%	0	0.00%
IP Violence	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	4.35%
Legal	1	10.00%	2	16.67%	2	16.67%	1	6.25%	4	11.76%	7	30.43%
Mandated	0	0.00%	1	8.33%	1	8.33%	2	12.50%	3	8.82%	0	0.00%
Marital	0	0.00%	0	0.00%	0	0.00%	1	6.25%	1	2.94%	3	13.04%
Relationship	0	0.00%	1	8.33%	2	16.67%	2	12.50%	3	8.82%	2	8.70%
Stress	3	30.00%	3	25.00%	1	8.33%	4	25.00%	7	20.59%	0	0.00%
Traumatic Event	0	0.00%	1	8.33%	1	8.33%	0	0.00%	1	2.94%	0	0.00%
Workplace Stress	1	10.00%	1	8.33%	0	0.00%	0	0.00%	1	2.94%	1	4.35%
Total	10	100%	12	100%	12	100%	16	100%	34	100%	23	100%

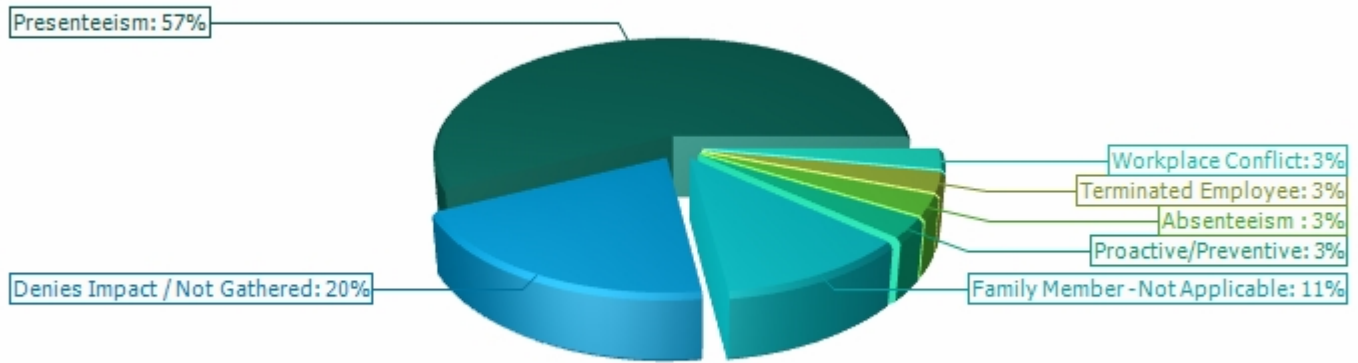
The presenting problem is self-reported by the employee upon intake. However, the clinician may change the presenting problem based on the information collected during the assessment period.

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Impact of Problem



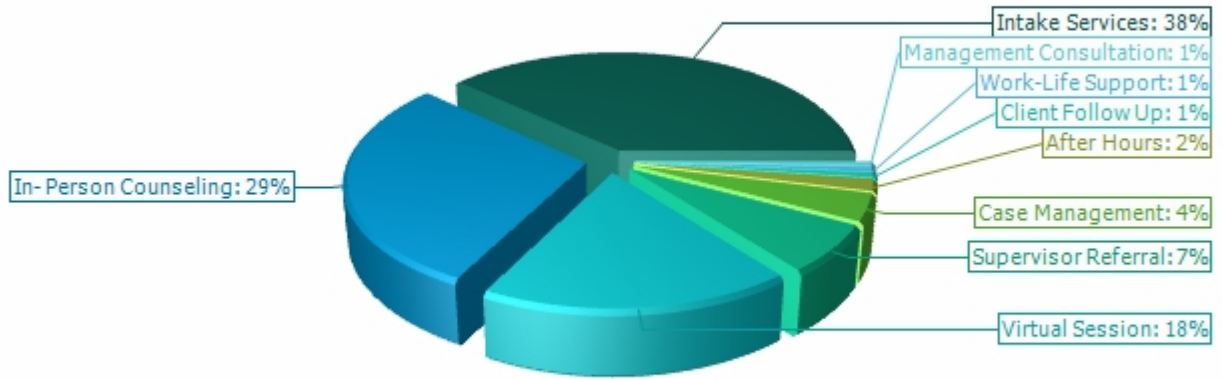
Impact of Problem	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
Absenteeism	0	0.00%	0	0.00%	0	0.00%	1	6.25%	1	2.86%	1	4.35%
Denies Impact / Not Gathered	2	20.00%	1	8.33%	3	23.08%	4	25.00%	7	20.00%	12	52.17%
Family Member - Not Applicable	1	10.00%	2	16.67%	1	7.69%	2	12.50%	4	11.43%	2	8.70%
Presenteeism	6	60.00%	8	66.67%	8	61.54%	8	50.00%	20	57.14%	7	30.43%
Proactive/Preventive	0	0.00%	0	0.00%	1	7.69%	0	0.00%	1	2.86%	1	4.35%
Terminated Employee	1	10.00%	1	8.33%	0	0.00%	0	0.00%	1	2.86%	0	0.00%
Workplace Conflict	0	0.00%	0	0.00%	0	0.00%	1	6.25%	1	2.86%	0	0.00%
Total	10	100%	12	100%	13	100%	16	100%	35	100%	23	100%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Activity Hours Summary



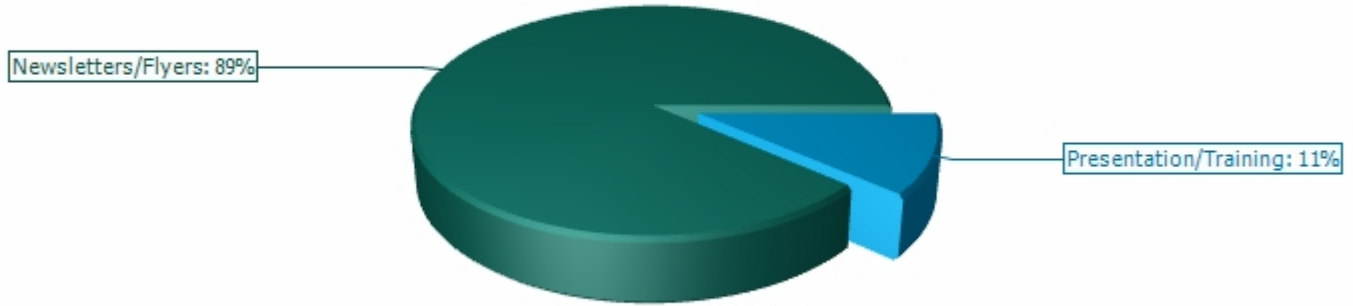
Activity Hours Summary	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
After Hours	0.00	0.00%	0.20	3.67%	0.45	2.78%	0.18	0.98%	0.83	1.71%	0.82	2.19%
Case Management	0.25	3.03%	0.17	3.06%	0.50	3.09%	0.93	4.97%	1.85	3.80%	5.00	13.43%
Client Advocacy	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	2.42	6.49%
Client Follow Up	0.00	0.00%	0.33	6.12%	0.00	0.00%	0.00	0.00%	0.33	0.68%	0.00	0.00%
In- Person Counseling	3.00	36.36%	0.00	0.00%	7.00	43.21%	4.08	21.74%	14.08	28.93%	16.00	42.97%
Intake Services	4.67	56.57%	4.08	74.92%	4.08	25.21%	5.83	31.06%	18.67	38.34%	12.42	33.35%
Management Consultation	0.00	0.00%	0.00	0.00%	0.33	2.06%	0.00	0.00%	0.33	0.68%	0.00	0.00%
Supervisor Referral	0.00	0.00%	0.67	12.23%	1.83	11.32%	0.75	3.99%	3.25	6.68%	0.00	0.00%
Virtual Session	0.00	0.00%	0.00	0.00%	2.00	12.35%	7.00	37.27%	9.00	18.49%	0.00	0.00%
Work-Life Support	0.33	4.04%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.33	0.68%	0.58	1.57%
Total	8.25	100%	5.45	100%	16.20	100%	18.78	100%	48.68	100%	37.23	100%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Organizational Service Type



Organizational Service Type	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
Account Support Services	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	5.00%
Newsletters/Flyers	2	100.00%	3	100.00%	2	100.00%	1	50.00%	8	88.89%	11	55.00%
Orientation	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	5.00%
Presentation/Training	0	0.00%	0	0.00%	0	0.00%	1	50.00%	1	11.11%	1	5.00%
Promotional Material Distribution	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	6	30.00%
Total	2	100%	3	100%	2	100%	2	100%	9	100%	20	100%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

Trauma Summary

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Trauma Summary	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2021 - 12/2021		1/2020 - 12/2020	
	#	%	#	%	#	%	#	%	#	%	#	%
No Data To Report	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%

UTILIZATION REPORT

The Citadel

January 01, 2021 - December 31, 2021

GLOSSARY

Cases: Total number of clinical cases for employees and eligible family members. This number does not reflect sessions per case. Count number and Serviced number may be different due to the number of individuals in each case. For example, couples counseling and family counseling may include more than one individual.

Information Calls: Inbound calls in which the caller is educated about services; however, a clinical case is not opened at the time.

Critical Incident: Traumatic event affecting the workplace for which the EAP/SAP/MAP has been contacted. This may include co-worker suicide, death of employee/family member, downsizing, robbery, etc.

Formal Management Referral: Mandatory referrals for counseling which include notification of compliance with appointments, treatment status, and recommendations to management. Sometimes referred to as Management Directed Referrals.

Management Consultation: Assistance for managers and supervisors on managing problematic employees, constructively advising employees, referring troubled employees, and developing action plans and coaching for successful interventions.

Presenteeism: Attending work but being more distracted than usual and/or demonstrating a lack of engagement. Some examples may include, but not limited to, missing deadlines and/or low productivity.



UTILIZATION REPORT

The Citadel

01/01/2022 - 12/31/2022



UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022 on New Files

UTILIZATION BY THE NUMBERS

Utilization Summary	Count	%	Serviced	%	Activities	%	Hours
Cases	22	57.9%	24	96.0%	71	71.7%	40.55
Information Calls	0	00.0%	0	00.0%	0	00.0%	0
Organizational Services/Critical Incident	15	39.5%	0	00.0%	15	15.2%	17.5
SAP/Student Assistance Cases	0	00.0%	0	00.0%	0	00.0%	0
Formal Management Referrals	1	02.6%	1	04.0%	13	13.1%	4.57
Management Consultation	0	00.0%	0	00.0%	0	00.0%	0
Total	38	100%	25	100%	99	100%	62.62

Count	Serviced	Activities	Hours
The total number of Cases, Information Calls, Organizational Services, etc. that have an open/service date that falls between (and includes) the reporting period date range.	The total number of service users (attendees) within Cases or Organizational Services that have an open/service date that falls between (and includes) the reporting period date range.	The total activities (contacts) from Cases, Information Calls, Organizational Services, etc. that have an activity date that falls between (and includes) the reporting period date range.	The total duration from all activities that have an activity date that falls between (and includes) the reporting period date range.

Utilization Rates Based on a weighted population of: 1000

Period Rate (Utilization Rate)

The total number of Cases, Information Calls, Critical Incidents, Formal Management Referrals, and Management Consultations, divided by the weighted employee population for the reporting period. Period Rate does not include Organizational Services Count or Serviced.

Period Rate (Count):	2.30%
Projected Annual Rate (Count):	2.30%
Period Rate (Serviced):	2.50%
Projected Annual Rate (Serviced):	2.50%

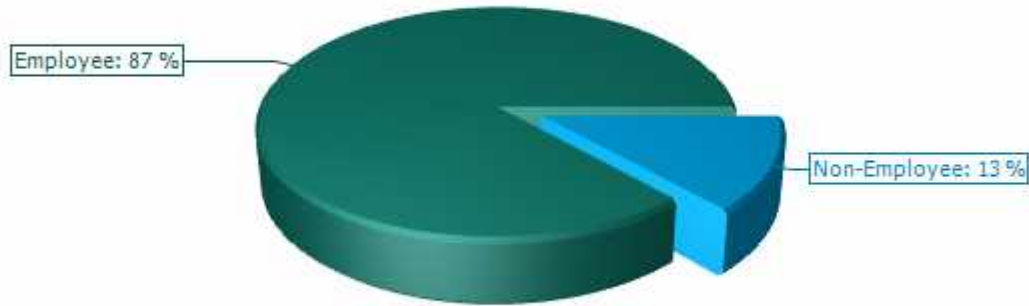
New/Ongoing Case Summary		Closed Case Count	
Total New Files	23	Total Files Closed	25
Total Open Files At 1/1/2022	9		
Total Open Files At 12/31/2022	7		
Total Files To 12/31/2022	124		

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Client Type



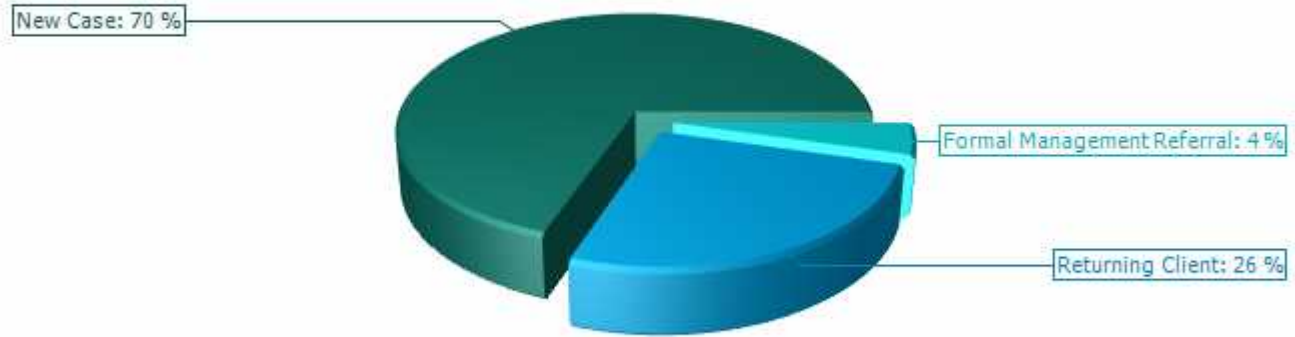
Client Type	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
Employee	7	100.00%	4	80.00%	7	100.00%	2	50.00%	20	86.96%	30	90.91%
HR Director	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.03%
Non-Employee	0	0.00%	1	20.00%	0	0.00%	2	50.00%	3	13.04%	2	6.06%
Total	7	100 %	5	100 %	7	100 %	4	100 %	23	100 %	33	100 %

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Case Status



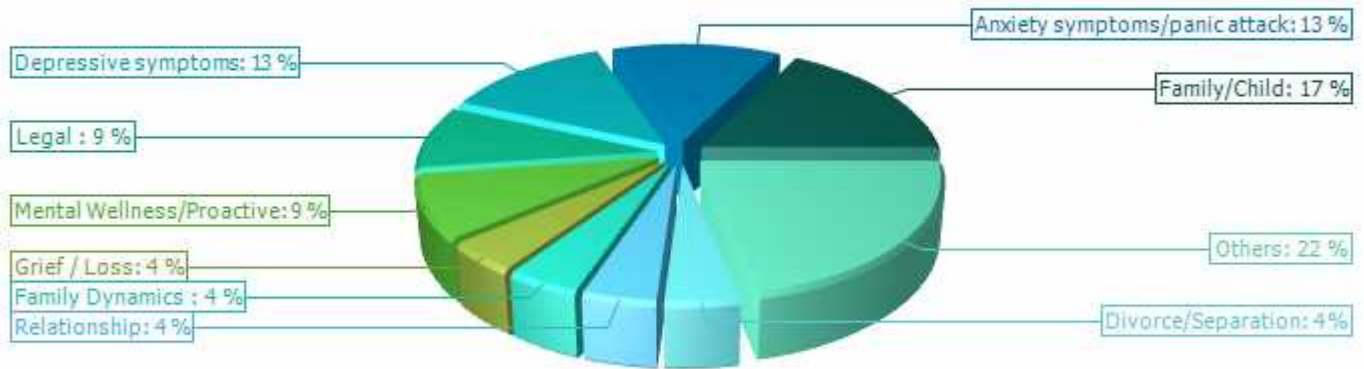
Case Status	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
Formal Management Referral	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	3	9.09%
New Case	4	57.14%	4	80.00%	5	71.43%	3	75.00%	16	69.57%	23	69.70%
Returning Client	2	28.57%	1	20.00%	2	28.57%	1	25.00%	6	26.09%	7	21.21%
Total	7	100 %	5	100 %	7	100 %	4	100 %	23	100 %	33	100 %

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Primary Presenting Problem



Primary Presenting Problem	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
Anxiety symptoms/panic attack	1	14.29%	0	0.00%	2	28.57%	0	0.00%	3	13.04%	1	3.13%
Depressive symptoms	2	28.57%	0	0.00%	0	0.00%	1	25.00%	3	13.04%	3	9.38%
Divorce/Separation	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	0	0.00%
Family Dynamics	0	0.00%	1	20.00%	0	0.00%	0	0.00%	1	4.35%	0	0.00%
Family/Child	0	0.00%	1	20.00%	2	28.57%	1	25.00%	4	17.39%	4	12.50%
Financial	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	0	0.00%
Formal Supervisor Referral	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	3	9.38%
Grief / Loss	0	0.00%	1	20.00%	0	0.00%	0	0.00%	1	4.35%	4	12.50%
Legal	0	0.00%	1	20.00%	1	14.29%	0	0.00%	2	8.70%	4	12.50%
Marital	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.13%
Mental health concerns	0	0.00%	1	20.00%	0	0.00%	0	0.00%	1	4.35%	0	0.00%
Mental Wellness/Proactive	0	0.00%	0	0.00%	0	0.00%	2	50.00%	2	8.70%	0	0.00%
Personal Stress	0	0.00%	0	0.00%	1	14.29%	0	0.00%	1	4.35%	7	21.88%
Relationship	0	0.00%	0	0.00%	1	14.29%	0	0.00%	1	4.35%	3	9.38%
Traumatic Event	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.13%
Workplace Stress	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	1	3.13%
Total	7	100 %	5	100 %	7	100 %	4	100 %	23	100 %	32	100 %

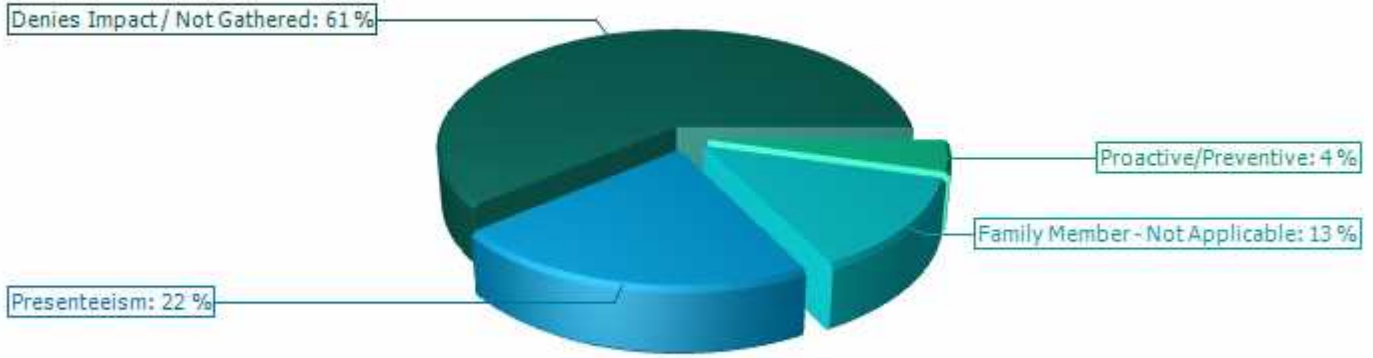
The presenting problem is self-reported by the employee upon intake. However, the clinician may change the presenting problem based on the information collected during the assessment period.

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Impact of Problem



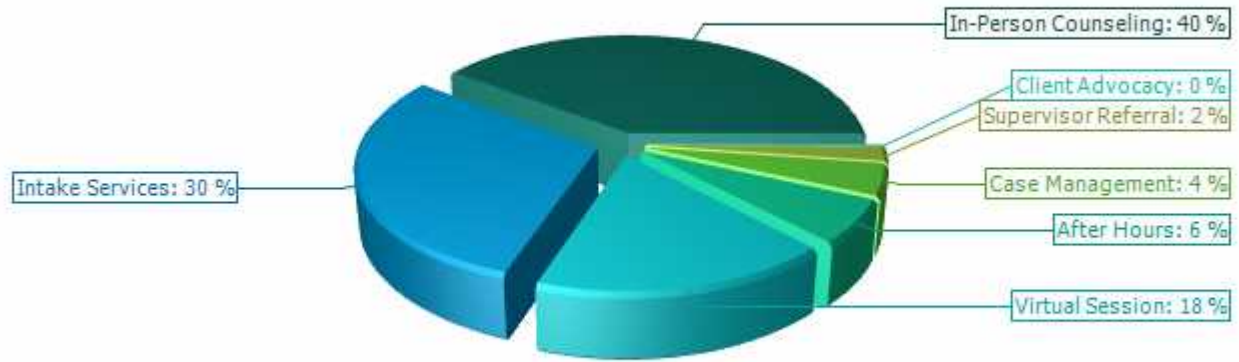
Impact of Problem	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
Absenteeism	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.03%
Denies Impact / Not Gathered	2	28.57%	3	60.00%	7	100.00%	2	50.00%	14	60.87%	6	18.18%
Family Member - Not Applicable	0	0.00%	2	40.00%	0	0.00%	1	25.00%	3	13.04%	4	12.12%
Presenteeism	4	57.14%	0	0.00%	0	0.00%	1	25.00%	5	21.74%	19	57.58%
Proactive/Preventive	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.35%	1	3.03%
Terminated Employee	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.03%
Workplace Conflict	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	3.03%
Total	7	100 %	5	100 %	7	100 %	4	100 %	23	100 %	33	100 %

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Activity Hours Summary



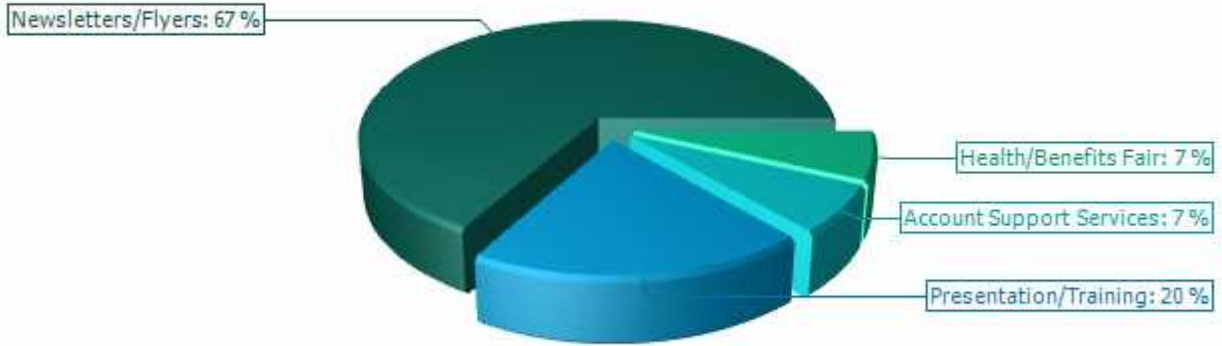
Activity Hours Summary	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
After Hours	1.58	7.72%	0.50	6.25%	0.00	0.00%	0.67	7.07%	2.75	6.10%	0.83	1.61%
Case Management	1.10	5.36%	0.33	4.17%	0.08	1.16%	0.43	4.59%	1.95	4.32%	1.85	3.58%
Client Advocacy	0.00	0.00%	0.08	1.04%	0.00	0.00%	0.00	0.00%	0.08	0.18%	0.00	0.00%
Client Follow Up	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.33	0.64%
In-Person Counseling	8.02	39.07%	1.00	12.50%	3.00	41.86%	6.00	63.60%	18.02	39.93%	14.08	27.25%
Intake Services	4.08	19.90%	2.92	36.46%	4.08	56.98%	2.33	24.73%	13.42	29.74%	18.67	36.12%
Management Consultation	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.33	0.64%
Supervisor Referral	0.73	3.57%	0.17	2.08%	0.00	0.00%	0.00	0.00%	0.90	1.99%	3.25	6.29%
Virtual Session	5.00	24.37%	3.00	37.50%	0.00	0.00%	0.00	0.00%	8.00	17.73%	12.00	23.22%
Work-Life Support	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.00	0.00%	0.33	0.64%
Total	20.52	100 %	8.00	100 %	7.17	100 %	9.43	100 %	45.12	100 %	51.68	100 %

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

Organizational Service Type



Organizational Service Type	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
Account Support Services	0	0.00%	0	0.00%	1	14.29%	0	0.00%	1	6.67%	0	0.00%
Health/Benefits Fair	0	0.00%	0	0.00%	1	14.29%	0	0.00%	1	6.67%	0	0.00%
Newsletters/Flyers	3	100.00%	2	66.67%	4	57.14%	1	50.00%	10	66.67%	9	90.00%
Presentation/Training	0	0.00%	1	33.33%	1	14.29%	1	50.00%	3	20.00%	1	10.00%
Total	3	100 %	3	100 %	7	100 %	2	100 %	15	100 %	10	100 %

January 01, 2022 - December 31, 2022

Trauma Summary	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2022 - 12/2022		1/2021 - 12/2021	
	#	%	#	%	#	%	#	%	#	%	#	%
No Data To Report	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%

UTILIZATION REPORT

The Citadel

January 01, 2022 - December 31, 2022

GLOSSARY

Cases: Total number of clinical cases for employees and eligible family members. This number does not reflect sessions per case. Count number and Serviced number may be different due to the number of individuals in each case. For example, couples counseling and family counseling may include more than one individual.

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