

## **Employee Assistance Program Services Product Schedule**

**1. Definitions.** For purposes of this Schedule, the capitalized terms shall have the following meaning:

**Community Assistance Resource.** A third party public or private facility, service, program, business, occupation or profession that provides services for the personal, educational, emotional or financial cares and concerns of individuals, including by way of example, services relating to education, medicine, mental health, Substance Abuse, law and finance.

**DOT.** United States Department of Transportation.

**DOT Regulations.** Regulations promulgated by the DOT pursuant to the Omnibus Transportation Employee Testing Act of 1991, and as codified as C.F.R. Part 40 (1994).

**Formal Referral.** The term used in regards to a management referral whereby the manager identifies a performance problem that the Employee must address, and suggests the EAP as a resource that might be helpful in support of this goal.

**Informal Referral.** The term used in regards to a management referral whereby a manager suggests to an Employee that the EAP could be helpful to assist with a personal problem.

**Mandatory Referral.** The term used in regards to a management referral whereby a manager identifies a performance problem and requires that the Employee work with the EAP as a condition of employment retention.

**Telephonic Employee Assistance Program.** A one-on-one relationship with a Telephonic Employee Assistance Program Clinician whereby the Participant receives consultation and guidance on how to manage work and life issues through goal setting and designing a personal plan of action to meet those goals.

**Telephonic Employee Assistance Program Clinician.** A mental health professional holding at least a master's level license.

**2. Participant Effective Dates of Coverage for EAP Services.** Subject to your payment of the applicable Total Monthly Fee, as set forth in Exhibit A, coverage for EAP services under this Agreement shall become effective for each Participant on the date specified by you.

**3. Access to EAP Services.** We will implement a plan to help the Participant resolve the issue prompting the request for EAP services through a joint effort between us and the Participant, which joint effort may include supportive counseling and problem-solving or when we deem appropriate, identifying a Community Assistance Resource for the Participant.

**4. Employee Assistance Services.** Subject to the terms of this Agreement, we shall provide Employee Assistance Program ("EAP") services as described below:

(a) Unlimited twenty-four (24) hour toll-free telephone access

(b) Assessment of the Participant's needs during the Participant's initial phone call

- (c) Telephonic EAP ("TEAP") services as described in Section 6 below
- (d) Up to five (5) Sessions per Participant per problem per calendar year with a Participating Provider
- (e) Referral to community resources
- (f) Follow-up
- (g) Management consultation and support services as a result of Informal Referrals, Formal Referrals and Mandatory Referrals from an Employee's supervisor or manager

## 5. Workplace Services

- (a) **Human Resource Consultation.** We shall provide consultation and support to your human resource representatives on a variety of workplace concerns related to behavioral health twenty-four (24) hours per day.
- (b) **Benefits Orientations.** Upon request, we shall provide manager orientations to introduce our services to your managers upon thirty (30) days' prior written notice for scheduling purposes. We shall provide one (1) orientation for every five hundred (500) Employees covered under this Agreement.
- (c) **DOT Services.** If your Employees are subject to DOT regulations, we shall provide access to Participating Substance Abuse Professionals who will provide consultation, coordination of services, and assistance in instances where your employees who work in safety sensitive positions test positive for drugs or alcohol as described in the DOT Regulations.

## 6. TEAP Services

- (a) **Referral to TEAP Clinician.** Once a Participant is identified as a TEAP candidate, the Participant is transferred to a TEAP Clinician directly or a telephonic appointment is scheduled with a TEAP Clinician. As part of the initial TEAP consultation, the TEAP Clinician and the Participant shall discuss the Participant's expectations and goals for TEAP, including agreement about follow-up consultations. The TEAP Clinician will work with the Participant to measure the Participant's progress in achieving goals, to identify challenges to progress, to offer motivation, and to support the Participant by providing information pertaining to the Participant's goals.

Additionally, the Participant will be asked to evaluate the TEAP Services and may receive a voluntary satisfaction survey after the completion of the TEAP Services.

- (b) **Support Tools and Information.** During the TEAP Services, the TEAP Clinician and the Participant may utilize various tools and information, including but not limited to:
  - i) Support tools, educational articles, goal tracking, surveys and other information.

- ii) Articles, resource links and tips personally researched by the Participant's TEAP Clinician and based upon the Participant-TEAP Clinician interactions and the Participant's goals.

**(c) TEAP Exclusions.** A Participant will not be considered a TEAP candidate if the Participant is a danger to self or others (i.e. suicidal, homicidal, domestic violence, child abuse), appears to be suffering from a major psychiatric disorder (such as major depression, generalized anxiety disorder, bipolar disorder, schizophrenia, personality disorders), has an active substance abuse issue, currently is involved in psychotherapy, has chronic psychological problems, is seeking marital or family counseling with multiple participants, or is a minor.

**1. Definitions.** For purposes of this Schedule, the capitalized terms shall have the following meaning:

**Adult/Elder Care Provider:** A resource facility, service, program, business, occupation, or profession that provides resources for, or is affiliated and associated with the needs, problems, cares, and concerns of the adult or elderly and aged; including by way of example resources for programs, facilities, and services relating to psychological, social, physical, and medical needs, nursing homes, foster homes, acute, intermediate, inpatient, or outpatient care, residential resources, and resources for support services concerning transportation, homemaking, meals, government assistance, financial planning and legal services.

**Adult/Elder Care Services:** Consultation and provision of information concerning the care and nurture of adults or elderly and aged dependents, and referrals to Adult/Elder resources including Adult/Elder Care Providers.

**ChildCare Provider:** A person, business or entity maintaining, operating or controlling a child care, day care, sick child care facility, including centers, homes, before and after school care, preschool, cooperatives, camps and summer programs for day, night and/or weekend care.

**Child/Parenting Support Services:** Consultation and provision of information concerning child development, parenting, and child care needs, and referrals to ChildCare resources including ChildCare Providers.

**Chronic Condition Support Services:** Consultation and provision of information concerning living conditions and personal matters relating to a chronic medical condition (for example, cancer or depression) of a Participant, and referrals to Community Assistance Resources.

**Community Assistance Resource:** A third party public or private facility, service, program, business, occupation or profession that provides services for the personal, educational, emotional or financial cares and concerns of individuals, including by way of example, services relating to education, medicine, mental health, substance abuse, law and finance.

**Convenience Services:** Access to information concerning services and resources of various types in the United States and Canada for Participants including information relating to household services, shopping, entertainment, dining, recreation and pet services.

**Domestic Relocation Services:** Consultation, education and assistance in addressing and resolving personal and family concerns associated with a work related move from one geographic location to another, including, but not limited to, psychological, work, life, and family adjustment issues such as stress resulting from the move, selection of a school in a new location, child care, and adult/elder care assistance.

**Life Learning Education Services:** Consultation, education, and referrals to address school choices and concerns at the primary and secondary levels as well as assistance and referrals in selecting a college, community college, vocational school, or graduate school.

**2. Services.** We shall provide the following:

## **2.1 Child/Parenting Support Services**

**(a) Child/Parenting Referrals.** Child/Parenting Support Services shall provide Participants with access to referrals to ChildCare Providers, Community Assistance Resources or other Child/Parenting Care Services. Participants are responsible for payment of any services received by a ChildCare Provider.

**(b) Consultation with Participants.** Child/Parenting Support Services may include our consultation with the Participant about his/her concerns or questions regarding child development or parenting.

## **2.2 Adult/Elder Support Services**

**(a) Adult/Elder Referrals.** Adult/Elder Support Services shall provide Participants with access to referrals to Adult/Elder Care Providers, Community Assistance Resources or other Adult/Elder Support Services. Participants are responsible for payment of any services received by an Adult/Elder Care Provider.

**(b) Consultation with Participants.** Adult/Elder Support Services may include our consultation with the Participant about his/her concerns or questions regarding the care and nurture of an adult/elder dependent.

**(c) Optional Services.** If the Participant has accessed the Adult/Elder Care On-Site Assessment, Participant and selected elder dependent will be given the opportunity to purchase the following Adult/Elder Care Services on a fee-for-service basis:

- 1) Ongoing Monitoring Services - \$115 (One Hundred Fifteen Dollars and no/100) per hour:
  - i. Routine communication with client to re-assess needs
  - ii. Ongoing, proactive identification of new and future issues and revision of care plan as appropriate
  - iii. Assistance with coordination of medical issues
  - iv. Identification of additional services and products to meet needs
  - v. Regular communication with family members
- 2) On-site assessment and care conference. Call for additional family members - \$580.00 (Five Hundred Eighty Dollars and no/100) per adult/elder.

## **2.3 Chronic Condition Support Services**

(a) **Chronic Condition Support Services.** Chronic Condition Support Services shall provide Participants with access to referral resources and support services for daily living with, or support for someone with, a chronic illness.

(b) **Consultation with Participants.** Chronic Condition Support Services may include our consultation with the Participant about his/her concerns or questions with regard to support for daily living with illness, social services, support groups, housing, travel special needs, or assistive technology and advocacy.

## 2.4 Life Learning Education

(a) **Life Learning Education Services.** Life Learning Education Services shall provide Participants with access to referral resources and support services for school concerns.

(b) **Consultation with Participants.** Life Learning Education Services may include our consultation with the Participant about his/her concerns or questions with regard to educational goals and needs.

## 2.5 Domestic Relocation Services.

The Domestic Relocation program offers consultation, support and resources to help employees and family members plan for and manage a smooth transition to the new location.

A Specialist will help guide the employee through the process, offer suggestions, provide referrals, and supply educational materials such as: “Moving Checklist” and “New School Blues: Helping Children Adjust After A Family Move.”

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### Help With Relocation – Employees and Family Members

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|---------------------------------|--------------------------------------|
| • Childcare facilities/programs | • Elder care facilities and services |
| • Colleges/universities         | • Medical                            |
| • Community centers             | • PreK-12 School information         |
| • Community education           | • Preschools and Cooperatives        |
| • Community resources           | • Recreational activities            |
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## 2.6 Convenience Services

**Services.** Convenience Services shall provide Participants with access to research and options on domestic or Canadian services or products.

## Legal & Financial Services Product Schedule

1. **Definitions.** For purposes of this Schedule, the capitalized terms shall have the following meaning:

**Mediation Services:** Access to information and/or referral to a mediator to resolve a Participant dispute in lieu of pursuing litigation. Mediation services do not include any disputes related to a Participant's employment.

**Financial Counseling Referral:** Access to information and/or referral to a financial counselor about a Participant financial matter.

**Legal Counseling Referral Services:** Access to information and/or referral to a legal professional about a Participant legal matter. Legal services do not include any legal matters related to a Participant's employment.

2. **Services. We shall provide the following:**

2.1 **Mediation Services**

Mediation Services shall provide Participants with access to a mediator for one (1) initial, thirty (30)-minute office or telephone consultation per dispute at no charge, to help resolve a dispute when it is determined that mediation would be a good alternative to litigation. Topics may include, but are not limited to, child custody, child support, property disputes, and landlord tenant issues. If additional services are required after the initial consultation, the Participant will be offered ongoing services with the initial mediator at 75% of the mediator's standard charge.

2.2 **Financial Counseling Referral Services**

Financial Counseling Services shall provide Participants with access to telephonic consultations with financial counselors, at no charge, on the basis of one (1) consultation for each separate subject matter, with each consultation lasting from thirty (30) to sixty (60) minutes. Local referrals are available for more complex financial planning matters. Topics may include, but are not limited to, financial coaching, debt consolidation and credit counseling, homeowners facing foreclosure, financial planning and tax services.

2.3 **Legal Counseling Referral Services**

(a) **Services.** Legal Counseling Referral Services shall provide Participants with access to an attorney to consult about a legal matter. Each Participant shall be entitled to one (1) initial, thirty (30)-minute office or telephone consultation for each separate legal matter at no cost with a network attorney. In the event that a Participant wishes to retain a participating attorney after an initial consultation, the Participant will be provided with a preferred rate reduction of 25% from the attorney's normal hourly rate. Topics for Legal Counseling Referral Services may include, but are not limited to, civil and consumer issues, personal family business issues, real estate matters, criminal matters, IRS matters and estate planning matters.

(b) **Limitation of Legal Counseling Referral Services.** Notwithstanding anything to the contrary in this Agreement or this Product Schedule, Legal Counseling Referral Services are not available for a Participant seeking a second legal opinion, a third party consultation, medical malpractice or health insurance issue advice, legal action against

any governmental or quasi-governmental entity, or assistance with employment law related questions.

#### **2.4 Website Pages Access**

Participants shall be provided with unlimited access to legal/financial Website pages that include estate planning tools and other content. Resources and topics on the Website pages may include, but are not be limited to, a legal library, simple legal forms such as affidavits, powers of attorney, estate planning documents and trademark documents, and other content covering issues such as bankruptcy, divorce and child custody matters, elder law, immigration, motor vehicle issues and personal injury matters.

### **Liveandworkwell.com Services Product Schedule**

**1. Definitions.** For purposes of this Schedule, the capitalized terms shall have the following meaning:



**Liveandworkwell.com:** Our member portal, which provides Participants with access to benefit and resource information, an online article library, numerous interactive tools and online discussions.

## **2. Services.**

**Liveandworkwell.com** shall provide Participants with on-line access to information in the following major subject areas: family & friends, health & wellness, managing life changes, work & management and/or education & learning. Within the major subject areas, Participants may access the following:

- (a)** Benefits and Referral information specific to your benefit plan.
- (b)** Options for accessing our services
- (c)** An article library that provides informational articles on topics related to EAP and worklife issues.
- (d)** Resource information regarding mental health providers, schools (domestic and international), colleges, childcare, camps, adoption, elder care, and bureau of consular affairs.
- (e)** Interactive tools, including financial calculators, interactive self-help programs and links to external resources.
- (f)** Message boards for Participants to pose questions, get answers, and share ideas.

## **Communication Materials Product Schedule**

For the duration and subject to the terms of the Agreement, we will provide the following educational and information materials:

### **1. Educational Materials**

- (a) Written Information.** We will provide individual Employees up to four (4) pieces of written information per consultation.

### **2. Member Materials**

We will provide you with one (1) brochure or flyer (including a perforated wallet card) that describes the benefit for every eligible Employee and a mutually agreed upon number of posters. We will also provide you with a sample Managers Resource Guide.

All materials will include the toll-free telephone access number and the Account number, where appropriate.

## **Training Services Product Schedule**

**1. Definitions.** For purposes of this Schedule, the capitalized terms shall have the following meaning:

**Consultative Services.** Services that incorporate a variety of approaches to effective employee management including needs analysis, human resource policy development, group facilitation, mediation of interpersonal and interdepartmental conflicts, and employee and management training and development programs.

**Critical Incident.** An unexpected, disruptive event, including, but not limited to, occurrences such as death or serious illness of a co-worker, acts of violence, situations requiring emergency medical assistance, extremely inappropriate or disruptive workplace behavior, threatening external acts such as robberies, fires and bombings, and natural disasters.

**Critical Incident Response Services ("CIRS").** Services, which provide rapid, on-site intervention in response to any Critical Incident affecting the workplace. Specially trained debriefers conduct sessions that are educational in focus and help Participants understand how to process the normal emotional, mental, and physical reactions commonly experienced after a critical incident.

**Training.** Training includes, but is not limited to, behavioral health seminars designed to build personal awareness in Participants and encourage individual responsibility in facing one's own personal problems and management development designed to help managers build the skills to improve both interpersonal and organizational effectiveness in relating to Employees.

## **2. Services**

**2.1 Training and Consultative Services.** We shall provide Training and Consultative Services upon thirty (30) days prior notification by you for scheduling purposes. Annual Training and Consultative Service hours as set forth in Exhibit A do not carry over from term to term. Additional Training and Consultative Services are available on a fee-for-service basis at our then-current hourly rate.

**2.2 Critical Incident Response Services ("CIRS").** We shall provide Critical Incident Response Services in response to any crisis or tragedy affecting the workplace. Debriefings are conducted within twenty-four (24) to forty-eight (48) hours after an incident occurs, based on the individual circumstances surrounding the incident. Annual Training hours as set forth in Exhibit A may be used to cover the cost of this on-site service. CIRS services are available on a fee-for-service basis at our then-current hourly rate.