

Utilization Report Glossary

Utilization Rate Summary Page

The Utilization Rate Summary Page is designed to give you a comparison of the different services offered through the Employee Assistance Program. Each service is broken down into categories that define the total number and the percentage for that quarter based off the category definition.

Category	Definition of Category
Weighted Population	Employee count for that quarter.
Count	Total number of cases opened for the specific service type. <i>See Type of Services for definitions.</i>
Serviced	Total number of individuals who have accessed the service (ie: Two people are present during counseling, there are two service users).
Hours	Total number of hours for the specific service type. This number is rounded on the summary page.
Total Current Quarter Rate	The quarter utilization is the total number of new cases divided by the employee population for that quarter.
Total New Cases	Total cases opened during the quarter. <i>Broken down further in the Case Status category.</i>
Total Cases Closed	Total cases closed during the quarter.

Types of Services

Category	Definition of Category
Account Management	The daily administrative time to maintain the contract. Includes such activities as telephone calls, e-mails, follow-up calls and meetings, generally with the main point of contact within your organization.
EAP Cases	Call taken and a file opened <i>Broken down further in the Case Status category.</i>
Organization Consultation	Consultation with a HR Personnel/supervisor or manager.
Organizational Service	A service provided to the organizational as a whole. (eg: Health Fairs, Trainings, Organizational Development Project, etc). <i>Broken down further in the Organizational Services Summary.</i>
Supervisor Referral	A referral made by management for an employee that is case managed by a Sand Creek clinician.

Case Status

Category	Definition of Category
Informational Call	General intake performed, but no referral was made at time of call.
New User	Has never utilized services before.
Re-User New Problem	Re-opened case with new presenting problem.
Re-User Same Problem	Re-opened case with same presenting problem.

Activity Hours Summary

Category	Definition of Category
Administration	Summarizes time related to activities performed to your company.
Case Consultation	Time devoted to consulting about a given case between a Sand Creek staff member and a provider.
Case Management	Time related to non-clinical, non-intake functions. Such time can be providing client with information on community resources, etc.
Clinical Assessment	Time spent assessing the client's situation and offering resources.
Follow-Up Call	Follow-up call to client to ensure they are connected with the resource that was offered to them and answer any questions they may have.
In Person Session	Face to face counseling session.
Intake/Telephone	This time includes the initial intake with the client, any further consultations with the client and the time to authorize the sessions with the chosen provider.
Provider Consultation	Time spent in vetting a provider, explaining expectations, and answering any questions.
Telehealth Session	Counseling sessions performed over the phone or through a HIPAA compliant video counseling platform.

Gender

Definition of Category

The gender that the client identified during the initial intake. Options include male, female, and declined/unknown.

Client Type

Definition of Category

The client types that are eligible to receive services based on the contract (eg: Employee, Spouse/Partner, Dependent).

Referred By

Definition of Category

Method by which the client was referred by.

Heard of Service

Definition of Category

How client heard of service.

Years with Employer

Definition of Category

How many years the employee has been employed by your company.

Primary Presenting Problem

Definition of Category

The identified reason the client is calling to access services.

Secondary Presenting Problem

Definition of Category

The secondary identified reason the client is calling to access services.

*****Demographic Questions are contract/organization specific. Your contract may include different questions that are asked during the initial intake process.***

Account Management Summary

Definition of Category

Captures all account management activities performed to your company.

Organizational Service

Definition of Category

Organizational Services that were performed to your company during the quarter. Additional details in this report capture the Organizational Service type offered, the duration of activities involved in the service and any other pertinent information.