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Memorandum

Date : November 25, 2019

TO : Hidalgo County

From : Gary Looney REBC

RE : "... Employee Assistance Program RFP NO: 2019-225-09-04-YZV"

Employee Assistance Programs (EAP) are employer sponsored programs that provide referrals to qualified counselors to help employees deal with a variety of personal problems. EAP services are available to all employees and members of their households. Initially, EAPs were created to focus on helping employers with the requirements of complying with the Drug Free Workplace Act of 1988. They have been expanded significantly to provide additional employee counseling services to include (partial list):

- Critical mental state counseling (stress, depression, anxiety)
- Crisis intervention counseling
- Grief counseling (group/individual)
- Family counseling (divorce, marriage, new parent)
- Legal counseling
- Financial counseling
- Worksite difficulties counseling
- Daily living needs counseling (being a care giver, special needs parent, childcare issues, teenage parenting, other)

Originally, there were five submissions in response to the RFP for the EAP. Blue Cross Blue Shield of Texas (ComPsych) pulled their quote as it was integrated with their medical plan.

Four companies presented complete proposals.

- a. Blue Cross Blue Shield of Texas (Magellan)
- b. United Health Care (Optum)
- c. Deer Oaks
- d. Aetna

The EAP RFP was requested by the Court in an effort to determine if an EAP would be beneficial to County employees at reasonable rate. The insurance committee met on November 20, 2019 to interview each of the four companies offering a proposal. Attached is the agenda and the discussion items requested. After hearing the presentations from each of the EAP providers, the committee discussed the services offered. It was apparent that the committee felt the services provided by an EAP would be an important benefit for employees. I discussed the cost of the plans being offered. The cost of an EAP is very affordable and should not be a deterrent from offering a plan. Cost comparison is shown on attached spreadsheet.

An EAP is beneficial for employees and affordable by the County.

The next step is to select a provider.

There were number of issues were found to differentiate the vendor offers. Please note that price is not a primary factor. These items are scored on the attached spreadsheet.

1. What is the professional level of the vendors call center triage service?
2. If face to face counseling, what is network access?
3. Extent of services including telephonic information not charged to session
4. Training for management and employees.
5. Estimated utilization

The County received four reputable responses to the EAP RFP. Three of the proposals, are from major insurance (BC/BS, Aetna, UHC) company subsets of their organization. One offering is from an EAP that specializes in EAP services with special interest in Public Entities. One of the questions asked of each of the vendors was, "What is your expectation of the percentage utilization of the plan"? The response by the three major carriers was consistent with a 3-5% utilization. Deer Oaks, the independent EAP, actual experience indicates a 9.5% utilization. This percentage differential is an indication that the training for managers, education of employees, and the easy access to their services is very positive.

As presented in the Deer Oaks RFP response, they have a large client base of public entity business with City of Mission, Cameron County, City of Austin, Travis County, Bexar County, Brazos County, Montgomery County, Williamson County, City of Brownsville, as well as many others in the Rio Grande Valley. As a result of the volume of business in the Hidalgo County area, Deer Oaks is able to provide access to a large number on contracted counselors. There are 85 contracted in Hidalgo County.

There are three primary methods of accessing an EAP.

1. Self-Referral
2. Directed Referral
3. Mandatory Referral

Self-referral is straight forward member calling the EAP access phone number or accessing through web portal or other method.

Directed referral would occur if an employee would recommend to a fellow employee that the eligible member contact the EAP. This would be a simple suggestion to a fellow employee that they might benefit from the EAP.

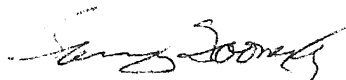
Mandatory referrals are a significant issue that must be carefully considered. Mandatory referral requires a manager to assess the need for an employee to seek help from the EAP. Each of the vendors provides access to a specific management referral intake specialist. The intake process includes counseling with the referring manager to establish the need for the employee's counseling. Once the need is established, the referring manager would seek a Release of Information (ROI) from the employee. The release would allow the referring manager to receive information about the referred employee's attendance to counseling sessions. Once the referred employee completes the counseling sessions, the referring manager will be informed of the completion of the sessions.

The County would need to co-ordinate the County's personnel policies to determine if a mandatory referral and employee compliance with the mandate would be a required "Condition of Employment". Many employers offer the EAP mandated referral to employees in an effort to help with workplace issues that jeopardize their jobs. Mandated access is established by the County and administered by the EAP. It is a totally option benefit available to the County.

Access to the management counseling services is offered for all managers as a standard benefit. Managers can call to help with managing all employee issues, including personal management stress issues.

Based on the interviews conducted with the various providers and evaluation of the services offered by each, the consensus of opinion of the insurance committee members and my recommendation is to contract with the Deer Oaks Employee Assistance Program. Deer Oaks has a substantial network of providers in Hidalgo County. Deer Oaks is exclusively an EAP provider with a very positive track record with public entities. While not the lowest priced, their offering is the best value for Hidalgo County.

Respectfully,



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Consultant

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Memorandum

Date : November 20, 2019

TO : Employee Assistance Program

From : Gary Looney REBC

RE : Interview Agenda for November 20, 2019

2 Minutes	Introduction of Presenter
18 Minutes	Vendor proposal presentation
	Please briefly describe:
	1. Who is eligible
	2. Intake/Triage process
	a. Professional level of intake counselor
	b. Access time for critical clinical care
	c. Access time for non-critical care
	3. Once evaluated
	a. How does member set appointment
	b. Professional level of counselors
	c. Does member have option of providers
	d. What sessions are telephonic
	e. What sessions are face to face
	f. Are counselors sub-contracted
	g. What if counselor is rejected by member
	4. How do you treat
	a. Critical mental state
	b. Family Counseling
	c. Legal Counseling
	d. Financial Counseling
	e. Wellness
	f. Substance abuse
	g. Grief (Individual/Group)
	h. Daily living needs (being a care giver, special needs parent, childcare issues, teenage parenting, other)
	5. Mandatory managerial referrals
	a. Intake process
	b. Example of service
	6. Employee Training/Information about services
	7. Employer Training/Information about services
	8. Case examples
	a. Substance/Alcohol Abuse
	b. Legal Issues
	c. Financial Issues
	9. Billing Process
20 Minutes	Questions and Answers

Hidalgo County Employee Assistance Program Analysis

Covered Employee Lives 3,883

	BC/BS (Magellan)	Aetna	UHC (Optum)	Deer Oaks
Premium Rate for 3 sessions Monthly	\$ 0.80	\$ 1.22	\$ 1.23	\$ 1.15
Monthly	\$ 3,106	\$ 4,737	\$ 4,776	\$ 4,465
Annually	\$ 37,277	\$ 56,847	\$ 57,313	\$ 53,585
Premium Rate for 6 sessions Monthly	\$ 1.42	\$ 1.44	\$ 1.63	\$ 1.49
Total Monthly Premium	\$ 5,514	\$ 5,592	\$ 6,329	\$ 5,786
Total Annual Premium	\$ 66,166	\$ 67,098	\$ 75,951	\$ 69,428
Premium Cost maximum Points 3090	\$ -	\$ -	\$ -	\$ -

	BC/BS (Magellan)	Aetna	UHC (Optum)	Deer Oaks
Network Providers	Limited network in RGV	Aetna behavioral network a subset of Aetna networks	Optum networks are subset of Optum network	Primary clinicians, counselors, attorneys, financial advisors, are in Deer Oaks network established for EAP.
Professional Level of Intake Counselors Network Providers maximum 100 Points	Call center Social workers to RNs Most have practices outside call center	Must have pre authorization to access network on line to set appointment	Masters level in a mental health field. 3 years experience	100% of intake have 3 yrs clinical experience with Masters and above designations
	60	85	85	100

Pharmacy maximum 980 Points	0	0	0	0
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	BC/BS (Magellan)	Aetna	UHC (Optum)	Deer Oaks
Digital Access Technology maximum points 95	Primarily Digital Access through Ascend website	Primary triage access is telephonic with extended access through website. iConnectYou App.	Primary triage access is telephonic with extended access through website. iConnectYou App.	Primary triage access is telephonic with extended access through website. iConnectYou App.
	95	95	95	95

	BC/BS (Magellan)	Aetna	UHC (Optum)	Deer Oaks
Wellness services Wellness maximum 300 Points	Through Ascend, on line digital aide for well being issues, sleep, fitness, weight loss	Triage input will direct to appropriate counselor	Triage input will direct to appropriate counselor	Triage input will direct to appropriate counselor
	300	300	300	300

	BC/BS (Magellan)	Aetna	UHC (Optum)	Deer Oaks
Additional Services Employee Eligibility Total Household	Yes	Yes	Yes	Yes
Multiple Year Rate Guarantee 3 year minimum	Yes	Yes	Yes	Yes
Critical need access Financial	Digital Virtual meeting	Call to pre-authorize face to face visit	Digital Virtual meeting	Face to Face within 6 hrs
Legal; will preparation and other legal services	Two 30 min telephonic	Telephonic access	Telephonic access	Unlimited telephonic access
Work Life Counseling	Two 30 minute telephonic (Sub contract Legal Shield)	One 30 minute, or one issue per telephonic session (Sub Contract)	Telephonic access Web based access	Deer Oaks legal network of providers 30 mins or face to face sessions
Grief Counseling	3 one hour sessions	3 one hour sessions	3 one hour sessions	3 one hour sessions
Daily living counseling	3 one hour sessions	3 one hour sessions	3 one hour sessions	3 one hour sessions
Crisis counseling	3 one hour sessions	3 one hour sessions	3 one hour sessions	3 one hour sessions
Management/Mandatory management referrals	Crisis team on call 24/7, available on request	Available 24/7	Available 24/7; 2-3 hour access: Fee \$225/hr	Crisis team available 24/7 on site within 24-72 hours. Large crisis team in RGV
Management Training	Yes	Yes	Yes	Yes
Employee Orientations	8 hours	10 hours	10 hours	12 hours web and 12 hrs on site
Estimated Utilization	One overview first year; Web based printable documents	Web based and printed materials	Web based and printed materials	Web based and printed materials local services provided
Telephonic Information and assistance	3-5%	3-5%	3-5%	9.5 -10.5%
Additional Services maximum 435 Points	Unlimited	Unlimited	Unlimited	Unlimited
	425	425	415	435

Total maximum points 5,000	5000	5,000	5,000	5,000
Points Awarded	880	905	895	930

Ranking	4	2	3	1
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