General Information

In 1989, Williamson County began utilizing a self-insured fund and a third party administrator to provide health insurance benefits for its employees. These health insurance benefits were provided at no cost to the employees until November of 1993.

Medical/Vision and Dental coverage is available through the Williamson County Benefits Plan, which is funded partly by Williamson County and partly by participating eligible employees. Eligible employees are covered by group life and AD&D insurance at no cost to the employee. Additional plans for employee-paid supplemental life insurance, accidental death and dismemberment insurance, short term and long term disability (LTD) are also available.

Medical/Dental/Vision:

Employees currently have three (3) medical plan options, vision coverage and two (2) dental plan options.

Wellness Program:

The County offers (1) Wellness Program option. Participation in the program is strictly voluntary.

Group Life, AD&D and Dependent Life

Group Life, AD&D and Dependent Life is provided by Williamson County at no cost to the employee. Levels of coverage are shown below.

Employee Life	Spouse Life Only	Child Life Only	Retiree Life Only
$20,000	$5,000	$2,000	$5,000

Voluntary Life, STD/LTD & Additional Voluntary Benefits

The County offers Voluntary Life, Voluntary STD/LTD, Critical Illness, Accident, Identity Theft, Pre-Paid Legal and Pet Insurance

HIPAA "OPT-OUT" Provisions

The Williamson County Benefits Committee elected to “opt-out” of all the optional HIPAA provisions available to non-federal governmental self-insured funds for the current plan year and voluntarily complies with granting creditable coverage for pre-existing conditions.

COBRA Administration

Williamson County currently has approximately 5 COBRA participant families with varying levels of coverage in the medical plans.

Flex Plan Administration

Williamson County has approximately 507 participants in the Medical and/or Dependent Care Flexible Spending Accounts.

HSA Plan Administration

Williamson County has approximately 30 participants in the Health Savings Account.

Employee Population

Williamson County currently has approximately 1928 employees who are all eligible for the Benefits Program offered by the County.

Retiree Medical/Dental/Vision

Williamson County retirees are eligible to continue their current Medical/Vision and Dental benefits until the retiree reaches age 65. Retiree premiums are based on years of service with Williamson County.

Current Health Plan Provider Information

Plan	Administrator
Medical	United Health Care
Network Provider	United Health Care
Dental	United Health Care
Network Provider	United Health Care
Vision Network	United Health Care - Spectera
Flex Plan Administration	United Health Care
HSA Plan Administration	United Health Care - Optum Bank
COBRA Administration/HIPAA	United Health Care
Prescription Benefit Manager	United Health Care - Optum
Group Life, Voluntary Life, STD/LTD, AD&D	Symetra
Voluntary Critical Accident & Illness	Metlife
Identity Theft Protection	InfoArmor
Pre-Paid Legal	Hyatt Legal/Met Law
Aggregate Stop Loss	United Health Care
Employee Assistance Program	Deer Oaks

Project Scope of Work

Williamson County currently offers an EAP through Deer Oaks. The current Plan Design includes a 6 visit EAP per occurrence, for all family members:

Services Offered:

The selected vendor will offer regular EAP services for employees to include:

Call Center Services 24/7/365 days to provide unlimited Assessment and Referral Services to employees and dependents along with Critical Incident Debriefings, and Management Referrals.

Life Coaching Services, available to employees through-out the year to help bring balance to employees work life balance.

Life Coaching Services and/or counseling available for children adolescents and teens under the age of 18. Parental consent required.

Provide monthly and annual utilization reports to Williamson County and assist employer with increased participation in the overall services offered.

Additional Requirements

Related Experience and References:

The County requires the Successful Respondent to have prior experience in all aspects of the services described in this RFP for customers similar to or with relevance in the size, complexity and scope of this RFP. In addition, this section should discuss the staff who would be assigned to service the County's account.

a. Identify the key personnel from your firm who would be assigned to this project. Include a brief description of their qualifications, background, experience and current job functions (including other accounts to which they are committed).

David Sachs will be the Williamson County's (County) Optum client executive, adding EAP to the Optum services (for example, clinical programs) provided to the County through the UnitedHealthcare relationship. He brings with him 25 years of experience in health care administration and consultative sales. David has advised hundreds of employer groups ranging from 100 to 10,000 employees on effective care and behavioral solutions, as well as introduced wellness and incentive management products to improve productivity and mitigate health care expenditures. David will work closely with UnitedHealthcare account team members Tanya Haught and Laurie Macina to implement the County's EAP and integrate support into existing UnitedHealthcare benefits and services delivered to the County. As all account team members work within the same enterprise, the County will benefit from streamlined integration and optimized strategic partnership.

Patrick Schaefer will be the County's Optum client services manager. Patrick has more than 30 years of experience in the health care industry. Patrick supports multiple sales account executives on UnitedHealthcare key account business, focusing on the Central States region. Duties include client-specific issues related to claims, eligibility and promoting products (e.g., member materials, health fairs, reports). In addition, he works with various internal Optum departments to achieve smooth implementations and maintains ongoing account service and support.

Supporting David and Patrick will be the County's strategic account executive from UnitedHealthcare, Tanya Haught. Tanya has more than 25 years of experience in the health care industry and has been with UnitedHealthcare for over 15 years. She leads and supports the account management team to adjust and respond to the ever-changing needs of her customers. Tanya is also responsible for renewal planning and monitoring the financial performance of her customers.

The County's UnitedHealthcare senior field account manager will continue to be Laurie Macina. Laurie has worked for UnitedHealthcare for over 25 years. She is the primary liaison between the County and the many functional units within UnitedHealthcare. She proactively manages escalated service issues and is tasked with determining root-cause analysis and overseeing any system corrections or changes. Laurie also assists with wellness initiatives and supports events, such as health fairs and open enrollment meetings.

Please refer to Attachment 1 for an organizational chart.

b. Describe your firm's experience as it pertains to providing products and services similar in size, complexity and scope to those required under this RFP.
We have more than 40 years' experience providing EAP services and currently serve over 100 customers in the public administration industry. Of these, we have contracts with states, cities and counties where we provide EAPs to a wide range of law enforcement and first responder personnel (such as police, department of corrections, probation officers, parole officers, firefighters, port authorities and sheriff's departments). Optum understands the unique needs that first responders face, including the high-level of emotional impact of working in this dangerous environment and the stress faced by their family members. We know how daily life challenges can increase the burden for the employee or family members already experiencing emotional distress
c. Provide references of at least 3 current clients and 3 former clients who terminated their services with your firm in the past 3 years. For each reference include:
1. Number of employees
2. Number/type of plans serviced
3. Length of servicing relationship with your firm
4. Reason for termination (if applicable)
5. Contact name, title and phone number.

We defer providing contact information for reference accounts at this time. Upon selection as a finalist for this contract, we will provide this information. References are an important part of the evaluation process, and we will arrange reference calls at the appropriate time.

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TRUCTIONS:

nplete the Questionnaire by summarizing answers in a short format, not to exceed the allotted space within the cell(s) provided. You may add extra rows, but do no

Question
Please provide the following information about your organization: *Name of company *Headquarters address *Phone number *Website *Primary contact and title
Briefly summarize the history of your organization, and ownership structure?
Do you anticipate any changes in your organizations basic ownership structure or any other significant changes in your organization (i.e. mergers acquisitions) within the next five years?
What are your Business Hours?
Do you provide a toll-free number for customer service? Do you provide an after hours call-in system, and how does it work? (please describe)
What is the average time to return a call?

List the academic and professional experience of your staff. This would include the Account Management team, and Counselors that would be assisting our employees and Human Resources team.
Which member of your team will be assigned as the day to day account service rep? How many other accounts does this individual have responsibility for?
List areas of counseling (individual and family) your organization is prepared to offer to the County and its members?
How does your organization handle client confidentiality?
Are you equipped to stagger the scheduling of employees in order to maintain their confidentiality? (either during an in-person, or virtual counseling session).
How do you provide comprehensive follow-up care after the member's initial request for help/assistance?

Explain your referral process.
Please describe your organizations levels of liability and E&O coverages.

Please provide addresses of locations where counseling will be available.
Is your network of providers contracted through your organization, or a third party? Please describe any financial interest you may have in this network.
Do you have any experience dealing with the needs of first responders? Please describe.
Does your Employees Assistance program include artificial intelligence to route or screen members?
Will your organization provide educational materials to the County for employees? Is there an extra cost for materials provided? If so, how are these materials provided and how often are these materials provided, monthly or quarterly?

What type of educational resources do you offer to typical clients, please explain?

What type of services do you provide regarding Life Coaching which may/may not follow a non-traditional EAP Service?
What are your procedures for management and employee training? How much is this service, and how often is training provided?

Are you able, if requested, to provide seminars or assistance to management in how to confront troubled employees for possible referral to the program? Is this an extra charge?

Do you offer other services such as Safe Ride Program, Law Access for legal and financial services? How are these services provided per employee and how consultations are offered per employee by the hour or half hour?   What is the cost for these services offered?

Do you offer services such as balancing work and family life and a comprehensive wellness platform with a health risk and wellbeing assessment that can connect participants to the EAP and and/or Life Health Coaches?   If so, please describe how these services are provided to employees and dependents. Explain how these services are billed per employee, per hour?

How do you handle referrals to Long-Term Treatment Resources, as appropriate?
How do you handle Mandatory EAP Referrals?
Where is the billing dept. located? What determines whether the client is List Billed or Self-Billed?
Will a binder check be required, before implementation begins?
How will the monthly invoices be sent to the client?
What are the acceptable methods of premium payment?
Please provide samples of experience reports, and how often these reports are available? Are there separate fees for these reports, or are the costs embedded with the monthly fee PEPM?
Explain in detail your claims processing procedures if applicable. Do providers submit to your TPA a claim for reprocessing, or are they paid a capitated fee monthly? Are providers your employees, or independent?

Describe any Performance Guarantees you are willing to put in place.
Will you provide a three-year rate guarantee of employees covered on the effective date of the contract?
Can you provide the renewal information at least 120 days out from the policy year anniversary?
What is the termination provision in your contract? How much notice would you require for policyholder termination?
Please provide three references of EAP clients. These references should be similar in size and industry to Williamson County. Please provide the following information: *Company name *Number of employees *Contact name and title *Phone number *How long as a client?

Please provide two clients lost within the last 12 months that we may contact. Please provide the following information: *Company name *Number of employees *Contact name and title *Phone number [illegible]
Can you create Benefit Summaries for EAP coverage to help communicate the benefit to employees?

ministrative Questions:
Rates are guaranteed for how long?
Please provide an implementation plan, including key dates for a 1/1/2022 effective date.
Utilizing the zip codes on the census, please provide any areas that would not have access to provider within 20 miles.
Has your organization ever worked with/alongside a self-funded Medical PPO plan? Are you able to provide warm transfers to this vendor depending on the members need? Please describe.
Please outline the notification process when a provider is no longer participating in your network?

What online tools or Web access is available for the member, employer and broker?

ot add extra columns.

Response
Name of Company: Optum Headquarters Address: 11000 Optum Circle, Eden Prairie, Minnesota 55344 Phone: (888) 445-8745 Website: www.optum.com Primary Contact/Title: David Sachs, Sr. Client Executive; (770) 200-6788
Optum is a wholly owned subsidiary of UnitedHealth Group, a Delaware corporation. Our company began in 1979 as individual, specialized business units offering targeted health care services to employers, health plans, government agencies and public sector customers. In 1998, these business units joined under the Specialized Care Services division, offering health improvement programs to support employees across the health care continuum with staying healthy, getting healthy or living with illness. As a leading health services company, Optum combines technology, data and expertise to improve the delivery, quality and efficiency of health care. We collaborate with all participants in health care, with a shared focus on creating a healthier world. This includes employers, health plans, government agencies and life sciences companies, as well as providers such as hospitals, doctors and pharmacies.
We examine growth opportunities, including mergers and acquisitions, to advance our overall business goals. Current customers are rarely affected by our mergers or acquisitions. Although we continue to make changes to our internal business structures, systems and product lines, these changes are typically invisible to our customers and employees until they are experienced as fully integrated program and service enhancements.
We operate 24 hours a day, seven days a week.
Yes. Employees and their dependents can access the EAP 24 hours a day, seven days a week through a toll-free number or the website click-to-call feature. Master's-level staff answer EAP calls for safe and convenient access. After-hours and weekend support is provided from our San Antonio and Atlanta call centers as well as out of our San Francisco call center for California callers (Knox-Keene).
Master's-level employee assistance specialists answer all EAP calls 24 hours a day, seven days a week. In any instance requiring a call back, such as a late-night outreach to a management consultant, the call is returned within one hour.

Account Management Team
David Sachs will be the County’s Optum client executive, adding EAP to the Optum services (for example, clinical programs) provided to the County through the UnitedHealthcare relationship. He brings with him 25 years of experience in health care administration and consultative sales. David has advised hundreds of employer groups ranging from 100 to 10,000 employees on effective care and behavioral solutions as well as introduced wellness and incentive management products to improve productivity and mitigate health care expenditures. David will work closely with UnitedHealthcare account team members Tanya Haught and Laurie Macina to implement the County’s EAP program and integrate support into existing UnitedHealthcare benefits and services delivered to the County. As all account team members work within the same enterprise, the County will benefit from streamlined integration and optimized strategic partnership.
Patrick Schaefer will be the County’s Optum client services manager. Patrick has over 30 years of experience in the health care industry. He supports multiple sales account executives on UnitedHealthcare key account business, focusing on the Central States region. Duties include client-specific issues related to claims, eligibility and the promotion of products (e.g., member materials, health fairs, reports). In addition, he works with various internal Optum departments to achieve smooth implementations and

Patrick Schaefer will be the County’s Optum client services manager. He supports multiple sales account executives on UnitedHealthcare key account business, focusing on the Central States region. Duties include client-specific issues related to claims, eligibility and the promotion of products (e.g., member materials, health fairs, reports). Patrick manages several key accounts across 5 states.

Depending on the outcome of the initial assessment by our employee assistance specialists, members may be directed to telephonic EAP consultation; in-person or virtual visits EAP counseling; community resources; legal and mediation services; financial services; interactive services on the reimagined Live and Work Well website; organizational support services for managers, supervisors and HR personnel; and our cognitive behavioral therapy (CBT) and mindfulness offering through Sanvello Premium.
Our provider network offers a wide range of counseling options, both in-person and through virtual visits. Employee assistance specialists can help individuals identify providers who meet their preferences, or individuals can search on their own on the Live and Work Well website. They can filter for providers who specialize in individual,

Our EAP stresses confidential access and assistance for all employees. Therefore, if an employee self-refers into the benefit, we do not report back to the employer, even if the employee is in a safety-sensitive position. We, however, notify the employer if the employer’s policies and procedures contain a notification provision regarding safety-sensitive personnel (e.g., a nuclear facility) who voluntarily seek treatment. In such cases, companies should have communicated the policy to the employee population (we

Yes. While we do not have specific procedures in place to prevent two employees from arriving in a clinician’s waiting room at the same time, there are factors that minimize the likelihood of this happening. For example, the large number of clinicians in our network with private offices (as opposed to centralized clinics) significantly reduces the chances of accidental meetings between co-workers or their dependents, maximizing privacy and preserving confidentiality. Many providers in our network offer virtual visits sessions, giving individuals greater privacy in being able to choose a time and place that is most convenient and comfortable for them to engage.
Additionally, the EAP stresses confidential access and assistance for employees. Our toll-free number and click-to-call and click-to-chat features are accessible 24 hours a day

With employees’ permission, we follow up on all EAP calls. Follow-up is based on the acuity of employee presenting issues, detailed as follows:
• Emergent and urgent calls: Employee assistance specialists supporting members with emergent needs call them within six hours of their initial contact to confirm they connected with referred resources and verify safety. In urgent situations, the specialists call members within 24 hours of their initial contact to confirm that members connected with referred resources. For both emergent and urgent calls, if employee assistance specialists cannot reach members, we send follow-up letters that provide EAP contact information in case they have additional needs. Supervisors are available to consult with employee assistance specialists on emergent and urgent calls.
• Routine calls: For routine EAP calls, at the time of the initial assessment, we ask members for permission to contact them by email or phone for follow-up. Employees who call with routine issues/concerns and who have agreed to be surveyed receive email or telephonic follow-up 10 to 15 days after their initial contact (we also assess satisfaction

When employees call the EAP, master's-level employee assistance specialists perform solution-focused consultation and full benefit exploration to identify the best resource(s) to use. Master’s-level clinicians have information about employees’ eligible benefits and will help them understand and access eligible employer-sponsored benefits. When assessing the individual, they identify and refer to any internal or external resources that can help and warm transfer into programs, which can include worklife services, legal and financial support or self-help tools, behavioral health or medical plan support, disability, clinical programs and more.

For assessment or short-term counseling under the EAP benefit, we make the referral process as simple as possible and authorize all available visits during initial calls. As part

Our ultimate parent company is UnitedHealth Group. The following are highlights of the comprehensive insurance coverage we carry in support of our operations:

- General Liability: $1 million/occurrence and $3 million in aggregate
- Workers’ Compensation/Employer’s Liability: Statutory limits/$2 million each accident/disease/policy limit; workers’ compensation coverage is statutory since the coverage amounts are set by each state; our Employer’s liability coverage is $2 million for each accident/disease/policy limit
- Professional Liability (also called Errors and Omissions coverage): $10 million each claim/$10 million aggregate
- Professional Liability (medical malpractice): $5 million each claim/ no annual aggregate
- Cyber Liability: $10 million each claim/$10 million aggregate

Based on the census provided, and the access point within 20 miles of the zip code, we have more than 3,400 network providers available to employees in the County's represented area. Please see Attachment 2 – Geo Access Report.
To locate network providers, we offer a guided search tool on our website that uses a brief questionnaire to establish a closer match between the employees' needs and

We do not lease/rent any part of our network from other sources. All network clinicians (including virtual visits clinicians) and facilities are contracted directly with Optum.

Yes. Our EAP provides the following support to first responders.
Unique Provider Search
• Members and employee assistance specialists can search for network clinicians who specialize in issues, such as PTSD, grief and loss, depression, stress and other concerns commonly seen in first responders/safety personnel.
• Our national network includes clinicians and facilities who specialize in treating first responders (including police officers) throughout the country.
Protecting Confidentiality
• We authorize all EAP visits up front by phone or online.
• Our national clinician network includes sub-network of 52,300 virtual visits EAP clinicians.
• Police officers concerned about being treated alongside individuals they may have previously arrested may seek treatment outside the area. We assist these individuals by finding clinicians/facilities outside the immediate community experienced in treating law enforcement personnel.
Additional EAP Support
• Critical Incident Response Services (CIRS) program that is mindful of the unique needs of public safety and law enforcement personnel
• An EAP that is available to the household to support family members of first responders

No. Whenever members call our toll-free number, they reach a call tree that includes a few options from which members can select to help ensure they are routed to the resource that is best positioned to help meet their needs. Members are connected—within seconds—to employee assistance specialists, 24 hours a day, seven days a week.
When someone calls, they need our help now. Our master's-level clinicians use their training, expertise and compassion to provide in-the-moment support through solution-focused consultation and compassionate coaching. They spend as much time as needed (16 minutes on average) to listen to callers, de-escalate the situation (if needed), ask questions, help them share their concerns, and plan for the right next steps and connect to resources, which can include provider referral and appointment search, if relevant.
We have found that 50 percent of EAP callers want this immediate support, which is why we provide this level of clinical expertise and support.

We will deploy our digital Optum EAP orientation tool to introduce employees to our EAP/WorkLife Services. This self-serve orientation tool offers a modular approach with interactive content. The orientation lasts about 10 minutes and gives employees a complete overview of their EAP/WorkLife Services benefits. Our digital orientation can be sent to individual employees at any time to remind them of the program benefits and support. This video is included in our program pricing– without needing to use training hours.
In addition, the County will receive our printed trifold brochure containing the tear-off wallet card in their first year. This brochure is printed and bulk shipped one time for the first year.
We also provide a toolkit that includes engagement materials with links to Live and Work Well. To help with promotional planning, we provide a communications calendar outlining national and international wellness days (such as National Mental Health Month and Post-Traumatic Stress Disorder Awareness Day), which also includes lists of articles that will be highlighted each month on Live and Work Well. In addition, employees can sign up to receive emails on topics that deal with common stressors of personal and work life.
Other available materials personalized with the County's toll-free number and logo include:
• Program posters
• ENewsletters

Our Live and Work Well online health and wellness library features articles, videos, assessments and calculators from reliable resources (such as Truven Health Analytics) to support the health and well-being concerns of employees. The website includes a series of online self-management and therapy-enhancement programs (for stress, alcohol or drug use, and depression) that combine interactive exercises with vivid tools and images, peer stories and expert guidance to provide education and ongoing progress reports tailored to individual employees.

We have topic centers with content-relevant guides, articles, resources, videos, assessments, screeners, and calculators. Relevant benefits information and links are accessible through the Highlighted Benefit area.

Through the EAP benefit, employees can call and immediately speak with master's-level clinicians and receive sub-clinical support and resolution. If more consultative coaching is needed beyond that initial call, employees can schedule telephonic consultations with one of our in-house, licensed telephonic employee assistance specialists (also master's-level) to help them to continue working on their goals. The same specialist can then schedule subsequent telephonic visits with employees without using any of the network clinician face-to-face visits to which employees have access.

Also included in our EAP offering is Sanvello Premium. Sanvello is a self-help app that uses CBT concepts and mindfulness techniques to help employees improve their well-being from the convenience of their smartphones, tablets or computers. Employees can track their moods and health data and receive recommendations for activities designed to be most effective in that moment. The app helps employees address anxiety, depression and stress through the following features:

- Daily mood tracking: Employees answer simple questions each day to assess their moods; identify patterns; and track health activities, such as sleep and exercise, to see progress over time.
- Goal setting and progress assessments: Through weekly check-ins, employees can track their progress and set goals related to activities in the app and on their behavioral change commitments.

Our Web-based training order form is easily accessed through the County's Live and Work Well website page and submitted directly to our Customer Training Department. The form has drop-down and pop-up fields—leading the user to select available options for a more streamlined process.

We can tailor each seminar to fit the individual workplace and situation. When a County representative contacts us to request training, we will ask the representative to describe any workplace situation that motivated them to request a particular training topic. We also take the time to discuss relevant workplace history and characteristics of the participant population.

Before the date and time of the requested training, we will ask the County to copy the participant booklets so there are enough for one per participant and provide an LCD projector and a laptop computer. For back-to-back session scheduling, we recommend a 10- to 15-minute break between sessions so that the trainer can address any changes to the presentation.

Our nationwide network of more than 1,000 trainers conducts the trainings. We select these professionals for their solid understanding of adult learning principles and instructional techniques appropriate to diverse learning styles, their proven success as presenters and their extensive knowledge in specific subject areas. Their broad range of expertise includes organizational development, employee relations, substance use prevention, nutrition, conflict resolution, management development and many more.

Management consultants telephonically support managers, supervisors and HR staff for any workplace concern, including management referrals. Management consultants address sensitive personnel topics, understand complicated regulations—such as DOT rules regarding substance use disorder (SUD) and fitness-for-duty procedures—and provide expert guidance, even for small matters. There is no additional cost or limit on the number of telephonic Management Consultation services provided.
We also offer training programs on a variety of topics related to workplace and work/life issues.
Our Management Development programs help managers polish communication skills and understand organizational dynamics. Managers learn how to enhance employee relationships and knowledge, as well as improve morale and motivation in the workplace. Topics Include:
• Building Resiliency for Managers
• Critical Incident Stress for Managers
• How to Address Performance Concerns
• How to Build Successful Teams
• How to Improve Communication Skills
• How to Manage Change
• How to Use Conflict as Opportunity
• Mental Health Fundamentals for Managers
• Preventing Bullying and Harassment for Managers
• Preventing Sexual Harassment
• Substance Use Disorder in the Workplace: A Manager’s Responsibilities
• Performance Management
• How to Build Workplace Motivation and Morale
• How to Coach for Success
• How to Manage People Effectively
• How to Recognize Changes in Employee Behavior and Take Appropriate Action
• Corporate Consultation/Special Circumstances
• Leadership Certificate
• Corporate reorganization
• External resources
• Disaster preparedness
• Take your child to work

Financial Services
We provide employees with financial well-being support through our relationship with My Secure Advantage (MSA) and their comprehensive suite of financial resources and tools. As part of our standard EAP, employees receive two free 30- to 60-minute telephonic financial consultation sessions with money coaches per issue per year. Employees can also access online tools and resources, such as a financial stress assessment, financial calculators and modeling, self-guided learning modules and a financial library.
Legal Assistance
For legal needs, employees have access to a network of more than 22,000 attorneys who average 18 years of experience practicing law. They must meet internal credentialing requirements, including primary source verification of licensure and liability insurance, background checks and reference checks. The benefit includes a free 30-minute telephonic or in-person consultation with a state-specific attorney per separate legal issue per year. If employees choose to retain referred attorneys, they receive legal services offered at 25 percent below the firm’s current rates. Issues for which legal support is available include the following:
- Divorce
- Deeds
- Document preparation

Through our EAP and WorkLife services, employees and their family members have convenient access to a host of services and supporting functions to help them address the personal and/or professional concerns affecting their ability to engage fully in their lives or perform to their fullest potential at work. Employees benefit from having convenient, anytime access to master's-level employee assistance specialists and subject matter expert worklife advisors who conduct comprehensive assessments of their needs to identify the most appropriate resources for their presenting issues, including balancing work and family life and accessing wellness services.

The assessment includes:

- A lifestyle screening: Developing comprehensive views of members and the full scope of their presenting issues
- Solution-focused consultation: Helping individuals clarify their goals and identify their available resources
- Full benefit exploration: Connecting members with available programs and resources

This comprehensive assessment helps individuals shift from problem-centered mindsets to solution-focused orientations that use their internal and external resources. Specialists will also refer them to other resources available through the County, including wellness services through Virgin Pulse.

Interactive Web services and app

The Live and Work Well website offers improved navigation and a personalized user experience designed to drive engagement in resources that are most relevant to the person's needs. Based on responses to a brief questionnaire, the portal displays relevant tools, resources, content and programs for ease of access at the time when people are most likely to access them. Each program or resource includes a description about the resource, empowering individuals to select the type, intensity and mode of care that is right for them.

Specific to balancing work and family life, the website has a Life & Work center, with subtopics on relationships, well-being, parenting, school and education, career and workplace, caregiving, military and veterans, active lifestyle and pets. For example, there is a Balancing Life and Work section with guides on stress management, workplace health, building resilience, telecommuting and more.

Employee assistance specialists educate individuals on how they can access the searchable databases and directories on the website, so they can identify resources for a myriad of work and life needs. Live and Work Well provides a wealth of other materials, such as articles on child/parenting issues, wellness, aging, work and family balance, and adult/elder issues; a chronic condition resource center; tools, such as online will-making documents and retirement planning tools; and our smoking cessation program.

EAP Services

Depending on the outcome of the initial assessment by the employee assistance specialist and based on the needs of the individual, referrals can include the following services:

- Telephonic EAP consultation: Licensed telephonic employee assistance specialists engage employees in collaborative discussions to resolve specific life or emotional concerns. They help them develop clear and specific goals and identify steps they can take to achieve them. Telephonic employee assistance specialists also work with and support individuals while they take those first steps. These consultation sessions do not count toward the employee's allotted provider visits and can be used to discuss a variety of topics, like work/life balance, relationships, reducing stress and more.
- In-person and virtual visits EAP counseling: Individuals may be referred to network clinicians for short-term and goal-oriented in-person counseling. Our nationwide network includes 202,600 non-prescribing clinicians, all of whom are qualified to receive EAP referrals. They also participate in our larger behavioral health network of 259,300 carefully credentialed licensed clinicians—supporting continuity of care for members who may require continued counseling under our integrated EAP/Behavioral Health services. We

Your employees and their families will benefit from our integrated EAP and Behavioral Health services since you currently have UnitedHealthcare benefits today. This means that 100 percent of our EAP network clinicians also participate in our behavioral health network. As the County's provider for behavioral health benefits through UnitedHealthcare's medical plan, members who see network clinicians under the EAP benefit can continue seeing the same clinicians under the Behavioral Health benefit (if ongoing behavioral health services are necessary). When members exhaust their EAP visits and need continued treatment, the process is seamless for them. Clinicians can use the authorization request function on our clinician website, www.providerexpress.com, or they can send a benefit notification form to us, which triggers a transition into the behavioral health benefit for continued counseling.

Our integrated EAP/Behavioral Health approach helps achieve the following:

- 27 percent lower outpatient costs on average for employees using behavioral health care and EAP
- 17 percent fewer outpatient visits on average for employees using behavioral health care and EAP

If employees are referred for counseling within the EAP, network EAP clinicians conduct face-to-face assessments, providing second opportunities to determine if employees

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Mandatory referrals will be based on the County's policies and procedures that require employees to seek and comply with EAP recommendations to maintain their employment, such as last-chance agreements regarding employment or employees who test positive on drug screenings. Managers can request EAP evaluations for a particular employee or group of employees for potentially harmful situations in the workplace, such as mental health or substance use.

The process includes the following:

- Management consultants complete initial consultations with referring managers to establish expectations and projected outcomes of the management referral process.
- Management consultants coordinate obtaining Authorizations for Disclosure of Information (by fax, secure email or mail). They confirm that managers have talked with their HR or legal departments regarding conditions of employment and review employee benefit options for coverage and service.
- Management consultants recommend that managers meet with employees to explain their organization's policies and discuss expectations with employees, the significance of signing the Authorization for Disclosure of Information and the potential for job jeopardy if employees do not keep their appointments.
- Management consultants authorize assessments and coordinate EAP counseling or longer-term care services, depending on the nature and acuity of employee presenting issues. The coordination of longer-term care is provided regardless if behavioral health services are managed by Optum or another vendor.

Following discussions with managers, management consultants conduct telephonic clinical screenings with referred employees, which includes a risk assessment to gather additional information about the situation and identify appropriate clinician specialties for each case. Management consultants then arrange for evaluations by network clinicians who possess the appropriate specialties. They explain to clinicians the reason for referrals, the urgent time frame and the need for prompt appointments and

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Our billing department is in San Francisco, California.

We offer two billing options from which the County can choose. Our preferred billing method is self-billing, in which the County would not receive an invoice from Optum but would initiate a monthly payment to Optum based on the County's enrollment counts. Alternatively, we do bill for premiums or administrative fees in advance of the

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No.

Through our preferred self-billing method, customers do not receive an invoice from us. Rather, customers pay monthly based on their respective employee counts each month. Each year, the County will receive an updated self-billing template with updated rates or fees that automatically calculates how much the County owes by entering

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We can accept invoice payments through Automated Clearing House (ACH), wire transfer and check.

As part of our standard offering included in the EAP, we provide quarterly and annual reports. Our standard reports will include an executive summary, recommendations, County-specific details (such as the number of employees covered), utilization detail, case penetration, website utilization information, presenting issues, services detail (services broken out by service name), member demographics, management services detail, use of CIRS and training services, on-site events overview, how employees

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Because we strive to understand and respond to regional market dynamics, our network clinicians are reimbursed on a fee-for-service basis according to a state-specific fee schedule, with fees determined by clinical service and licensure. We also find that a fee-for-service structure is more attractive to clinicians than a capitated system that restricts their clinical freedom.

Clinicians submit claims on standard CMS-1500 forms. All paper claims received from clinicians are initially scanned and batched. (They can submit EAP claim forms through

Performance guarantees are not available at this time.
Yes.
Yes.
Our standard contract provision states that any termination for convenience be available only after the first 12 months of services, and thereafter with 90 days' prior written notice to us. The initial 12-month period is necessary to recoup our startup costs, while the 90-day termination period allows us to orderly transition services while at the
We defer providing contact information for reference accounts at this time. Upon selection as a finalist for this contract, we will provide this information. References are an important part of the evaluation process, and we will arrange reference calls at the appropriate time.

We defer providing contact information for reference accounts at this time. Upon selection as a finalist for this contract, we will provide this information. References are an important part of the evaluation process, and we will arrange reference calls at the appropriate time.
Yes. Our standard communications materials include an EAP benefit flyer.
Rates are guaranteed up to three years.
Please see Attachment 3 for a sample implementation plan including key dates.
All ZIP codes on the census will have access to one or more providers within a 20-mile radius. Please refer to Attachment 2 for the County's GeoAccess report.
Yes. The County currently receives Behavioral Health services through our sister company, UnitedHealthcare, with our integrated EAP network. Employee assistance specialists always seek to coordinate with employees' medical and behavioral health vendors when appropriate, and they have extensive experience working with all major medical carriers. If the employee assistance specialist determines that a caller would benefit from their medical plan, the specialist can warm transfer the caller. In addition, network clinicians assume primary responsibility for assisting employees with coordinating ongoing care. Because EAP claims are pre-authorized and paid at 100 percent of the contracted amount with no member liability, coordination between EAP and behavioral health claims administration or claims reprocessing is generally not required.
Optum requests 30 to 90 days' notice when a clinician voluntarily leaves the network so we can notify the patients by letter at least 30 days before the clinician's expected termination date, unless otherwise specified by state or local regulations. The letter informs employees they have options for ongoing treatment (such as continuing treatment with their current clinician, finding a new clinician) and provides the toll-free number for the member to call to discuss future treatment options. When a clinician has been terminated involuntarily, we follow this procedure unless termination needs to be effective immediately (such as if the clinician loses license or commits gross

Today, the County and County members have access to Live and Work Well for behavioral health benefits and information. By adding EAP services, the Live and Work Well website will have enhanced EAP, WorkLife and emotional well-being support resources as well as expanded network provider search. The benefit is the County will only have one website for employees to visit to access all of their EAP and behavioral health needs, making accessing resources simple and seamless. (In Q1 2022, we are launching a new app and enhancing the personalization and navigation of Live and Work Well.)

Through our Live and Work Well website, employees can access care and benefit self-management tools, prevention programs (including our Suicide Prevention training program), substance use disorder support, recovery resources, searchable databases/directories, educational materials, calculators, Psych Hub videos and more. Adding EAP services from Optum expands the resources available to County employees who are members of the UnitedHealthcare medical plan with access to Live and Work Well through their behavioral health benefits. Managers, supervisors and HR staff also have access to a password-protected Admin Toolbox section that supports them with helpful resources and tools to help manage workplace concerns.

For example, our website, which is available in both English and Spanish, includes the following:

• Trainings, Webinars, Educational Resources and Articles: The website features thousands of articles, as well as guides, trainings, links to expert resources, financial calculators and more on topics related to behavioral health, lifestyle and well-being issues. Content is from reliable resources, such as Healthwise, and is organized for ease of navigation. Users can print out articles directly from the website, and many of the articles accessible through the library are available in Spanish.

• Legal/Mediation/Financial Tools and Resources: Employees have access to legal guides and forms and an interactive will-making program that employees can use to create their own state-specific wills privately online. Employees can also complete advanced directives, powers of attorney and similar documents.

The website also contains resources on issues such as financial fitness, identity theft, budgeting, credit and debt, insurance, retirement planning, and saving and investing. In addition, employees can find financial well-being resources through our vendor partner, MSA. This includes a financial stress assessment, self-directed learning modules, financial calculators and modeling tools, and a financial library.

EAP RFP WORKBOOK

INSTRUCTIONS:

Complete the EAP grid below assuming a 1/1/2022 effective date. Please see the attached summary of benefits to be quoted. Please provide a quote for each of the following scenarios:

- **Number of Face to Face Sessions;**
- **Child and Elder Care;**
- **Financial and Legal Consultations**

VENDOR NAME

	Current/Renewal 3 Visits	Proposed	Option 2
Counseling	Unlimited telephonic, 3 in-person meetings	Unlimited telephonic services, 3 in-person meetings	Unlimited telephonic services, 6 in-person meetings
Legal	Referrals	30 minute telephonic phone or in-person consultation	30 minute telephonic phone or in-person consultation
Financial	Referrals	Unlimited telephonic services	Unlimited telephonic services
# of participants			
1,928 Rates PEPM		• 3-visit EAP: $0.93 PEPM • WorkLife Services: $0.19 PEPM • ID Theft: $0.07 PEPM	• 6-visit EAP: $1.34 PEPM • WorkLife Services: $0.19 PEPM • ID Theft: $0.07 PEPM

Est. Monthly Premium		Please refer to Attachment 4 – Fee Quotation	Please refer to Attachment 4 – Fee Quotation
Est. Annual Premium		$0.00	$0.00

Does your program include the following Core Services as part of the PEPM Fee or is there additional cost? Please comments as appropriate

Service	Response	Additional Cost
Critical Incident Services	Included in Core scope of services	
EAP orientations	Included in Core scope of services	
Supervisory trainings	Included in Core scope of services	
Health Fair attendance	Included in Core scope of services	

Adoption Services/Assistance	Included in Core scope of services	

Online Training Sessions	Included in Core scope of services	
Child Care Search Services	Included in Core scope of services	

Smoking Cessation	Included in Core scope of services	

Elder Care Services	Included in Core scope of services	
Stress Management Services	Included in Core scope of services	

Wellness Services	Included in Core scope of services	
Onsite Training Sessions	Included in Core scope of services	

Integrated ID Recovery	At an additional cost	$.0.07 PEPM
Communications Materials	Included in Core scope of services	

Child Care Consultation & Referral	Included in Core scope of services	
Elder Care Consultation & Referral	Included in Core scope of services	
Educational Assistance	Included in Core scope of services	
Behavioral Modification Classes	Included in Core scope of services	

Financial Service Resources	Included in Core scope of services	

Life Coaching	Included in Core scope of services	
Daily Living Assistance	Included in Core scope of services	

Other: *Identify any other pertinent information you feel the client should consider in reviewing your quote.*	
[Enter fee here]	
[Enter fee here]	
[Enter fee here]	
[Enter fee here]	

chose from the dropdown list or provide

Comments:
CIRS may be charged against the bank of eight on-site service hours or purchased on a fee-for-service basis. The fee-for-service rate is $250 per hour, plus travel costs at $100 per hour.
Personal introductions to the program through orientations educate attendees on how to use the EAP (and the full scope of available services) for employees and for supervisors/HR to address employee performance issues, including the management referral process.
Supervisory trainings are covered using the bank of eight hours included or on a fee for service basis.
Your UnitedHealthcare and Optum account team will partner together to make sure health fair attendance is provided.

Worklife advisors conduct assessments of employees' family building needs, provide consultation about the resources available for the adoption process and locate referrals to adoption agencies, adoption attorneys, parent and adoptee support groups and adoption placement resources that specifically meet employees' needs. They also email informative materials and educate employees about the resources available on the Live and Work Well website. Topics of particular interest to employees adopting children include the following:

- Adopted children
- Adoption home study process
- Adopting older children
- Being a foster parent
- Considering a transracial adoption
- Custodial grandparenting
- International adoption
- Questions to ask an adoption agency
- Tax benefits for adoption
- Where to start

We have on-demand webinars on our website that can be viewed at any time. Current topics include Bullying and Violence in the Workplace, Communication Skills for the Workplace, The Sandwich Generation, and Conquering Fear and Anxiety. We also introduced a website in support of COVID-19 that has on-demand resources, such as the Moving Forward Together Podcast Series, Managing Relationships webinar, Living Off Your Wages during COVID-19 webinar, and Financial Best Practices in Uncertain Times. In addition, we offer Web-based training that is charged against the bank of eight hours included in the EAP.
Through the WorkLife Services, employees receive help with finding backup or emergency childcare resources.

The Tobacco Center on Live and Work Well (available in English and Spanish) offers valuable tools to help employees permanently quit smoking. The center centralizes the best website information, videos and resources about the dangers of smoking and ways to become and stay smoke free, quizzes on smoking costs, a link to a tobacco cessation plan and resource listings for support throughout the process. Tools and resources include: • Are You Ready to Quit Smoking? This interactive tool uses the stages-of-change approach to measure the participant's readiness to quit smoking and provides next steps based on assessed stage. • Videos: Topic examples include beating triggers, nicotine replacement medications, second-hand smoke and long-term health benefits of quitting. • A link sends participants to the American Lung Association's Freedom from Smoking to develop a personalized tobacco cessation plan. • Articles discuss the dangers of smoking, how smoking affects their loved ones, and the best ways to become smokeless and stay that way from different angles and for different audiences. • Smoking Cost Estimator tests users' knowledge about the costs of smoking—from their health to their wallet. • Resources facilitate connection with support groups in the member's area, national smoke-out events and other community-based support services to help

We help employees access various services associated with caregiving; aging; sudden, chronic illnesses; or disabilities. Referral topics include nursing homes, respite care, home care services, case management services and others.
Our EAP Life Change Support program helps employees cope with life changes and the increased stress and anxiety that can accompany, such events as marriage/committed relationships, death/bereavement, job loss, promotion, relocation, retirement, birth, adoption or divorce. Employees submit an online intake form through the Live and Work Well website and receive outreach from an employee assistance specialist.

Worklife advisors educate employees about referral options, for health and wellness options. Common requests include the following: • Acupuncture • Alternative therapies • Children’s health issues • Fitness centers • Health care planning • Meditation techniques • Nutrition • Prenatal classes • Relaxation techniques • Sleep • Stress • Weight loss • Yoga classes Worklife advisors use full benefit exploration to provide information to employees about other applicable benefits—such as nurse lines and healthy pregnancy programs—offered by their employers (or plan sponsors) that can help them take control of their own or a family member’s health issues. We store this benefit information in our system so worklife advisors can easily access it. In addition, our Live and Work Well online health and wellness library features articles, videos, assessments and calculators from reliable resources (such as Truven Health Analytics) to support the health and well-being concerns of our employees. The website includes a series of online self-management and therapy-enhancement programs (for stress, alcohol or drug use, and depression) that combine interactive
On-site training sessions may be charged against the bank of eight hours included in the EAP.

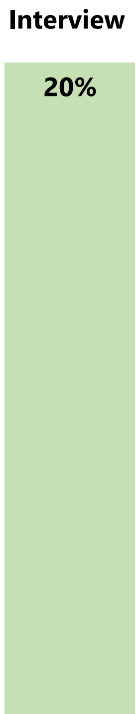
For an additional fee, our ID Protect offering provides employees with the security of knowing that we are monitoring for suspicious activity 24 hours a day, seven days a week. As part of ID Protect, employees have access to our ID Theft and Fraud Resolution program, which includes consultation with a highly trained fraud resolution specialist who conducts a seven-step process to help employees address theft and fraud. ID Protect provides fraud alerts and monthly risk scores to help keep employees' identities and finances safe.
We provide orientation materials at no additional cost. Full-color brochures with wallet cards describing the EAP/WorkLife benefit are printed and bulk shipped one time (included in our pricing). Additional program promotional material types as well as any ongoing requests are eDelivered. These materials, along with the brochures and wallet cards, can be personalized and are available in English and Spanish. Program materials include: •Worksite posters •Benefit flyers for health fairs •Flyers on specific support available from EAP and WorkLife Services •Wallet cards •Digital promotional assets designed for employer to push to employees - emails, banner ads and videos

Worklife advisors provide information and referrals for parents with children and childcare needs.
Worklife advisors provide information and referrals to address the needs of older adults and the family members who help care for them.
Our Life Learning Educational program helps employees find the best educational resources for their needs—from kindergarten, to college, through adult education. The program also has a career component and provides access to resources for researching college options.
Our CBT is a self-help app that uses concepts and mindfulness techniques to help employees improve their well-being from their smartphones, tablets or computers. Employees can track their moods and health data and receive recommendations for activities designed to be most effective in that moment. The app helps employees address anxiety, depression and stress through daily mood tracking, goal setting and progress assessments, interactive psychoeducation, relaxation techniques and coping tools.

Our financial benefit offers financial tools and calculators and two free calls with a money coach. In addition, our WorkLife Services can help find other programs and resources that relate to financial and housing problems, such as rental assistance or utility assistance programs. •Financial Library: Participants have access to financial calculators, forms and resources. •Pre- and Post-financial Assessment and Action Plan: Based on the results of the Financial Stress Assessment, we determine the source of any financial stress and develop financial action plans for any short- and long-term goals. •Financial Management Software: MSA Wallet is a financial aggregator and budgeting tool that provides a clear picture of the status of all linked accounts. •Self-directed Learning Modules and Worksheets: Participants have access to information on credit, debt, budgeting, retirement, student loans, home buying, investing, savings, taxes and more. •Live Financial Education Events: Participants can access real-time webinars on a variety of financial topics. •Money Coach Access: Employees can participate in two free 30- to 60-minute sessions of one-on-one telephonic financial coaching with credentialed money coaches per year. Money coaches can help with planning for the future (wealth management, joint incomes, tax planning); everyday needs (student loans, debt management, saving, and insurance coverage); major life events

Employees can use the toll-free EAP number to access licensed telephonic employee assistance specialists for unlimited telephonic consultations with issues that can be resolved through brief, solution-focused sessions (e.g., stress, adolescent concerns, coping with grief and loss and workplace concerns). Telephonic employee assistance specialists engage employees in collaborative discussions. They help resolve specific life or emotional concerns by helping employees develop clear and specific goals and identify steps they can take to achieve them. They then work with and support employees while they take those first steps. Use of this service does not count against the number of face-to-face sessions allotted to employees. Employees who use telephonic sessions still have access to the full complement of face-to-face/virtual visits counseling sessions or message-based therapy with a participating network provider available to them under the EAP.
Our WorkLife Chronic Conditions service addresses the needs of individuals, as well as their caregivers, who are living and working with chronic medical conditions, such as diabetes, cancer and heart disease. Referral topics include affordable housing, travel/special needs, remodeling, assistive technology and others.

Vendor Evaluation	%
RFP EAP - Pre-Solicitation Conference	**40%**
Call Center Services 24/7/365 days to provide unlimited Assessment and Referral Services to employees and dependents along with Critical Incident Debriefings, and Management Referrals.	
Life Coaching Services, available to employees through-out the year to help bring balance to employees work life balance.	
Life Coaching Services and/or counseling available for children adolescents and teens under the age of 18. Parental consent required.	
Technology Capabalities to support Overall EAP Program, Member App Services, Website, Virtual Coaching, Enhanced engagement Tools	
Provide monthly and annual utilization reports to Williamson County and assist employer with increased participation in the overall services offered.	
Proposed approach and plan to support Williamson County and comprehensiveness of services	**20%**
References	**10%**
Price (Lowest Bid/Vendor Bid) x (#of Available Price Points)	**30%**


Interview
20%

Account Management and Operational Support Team

Areas of Responsibility

- **Optum Account Management**
- **UnitedHealthcare Account Management**
- **EAP Operations**

David Sachs
Optum Senior Client Executive

Tanya Haught
UnitedHealthcare Senior Strategic Account Executive

Patrick Schaefer
Client Service Manager

Laurie Macina
Account Manager

Reporting Analysts

Employee Assistance Specialists

Critical Incident Response Services Support

Management Consultants

WorkLife Advisors

Employee Assistance Program Accessibility Analysis

OptumHealth Behavioral Solutions Network

Williamson County

September 1, 2021

Access Overview

September 1, 2021

Access Analysis
EAP Access Standards

Employee / Provider Groups
All Williamson County Employees
PHD_MSW

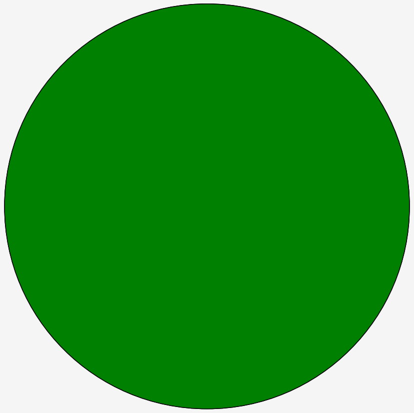
Comparison Graph
Percent of employees with access to a choice of providers over miles
- 1st closest
- 2nd closest
- 3rd closest
- 4th closest
- 5th closest

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

Overall Access[1]

1,774 Employees
184,808 providers at 82,878 locations (PHD_MSW)

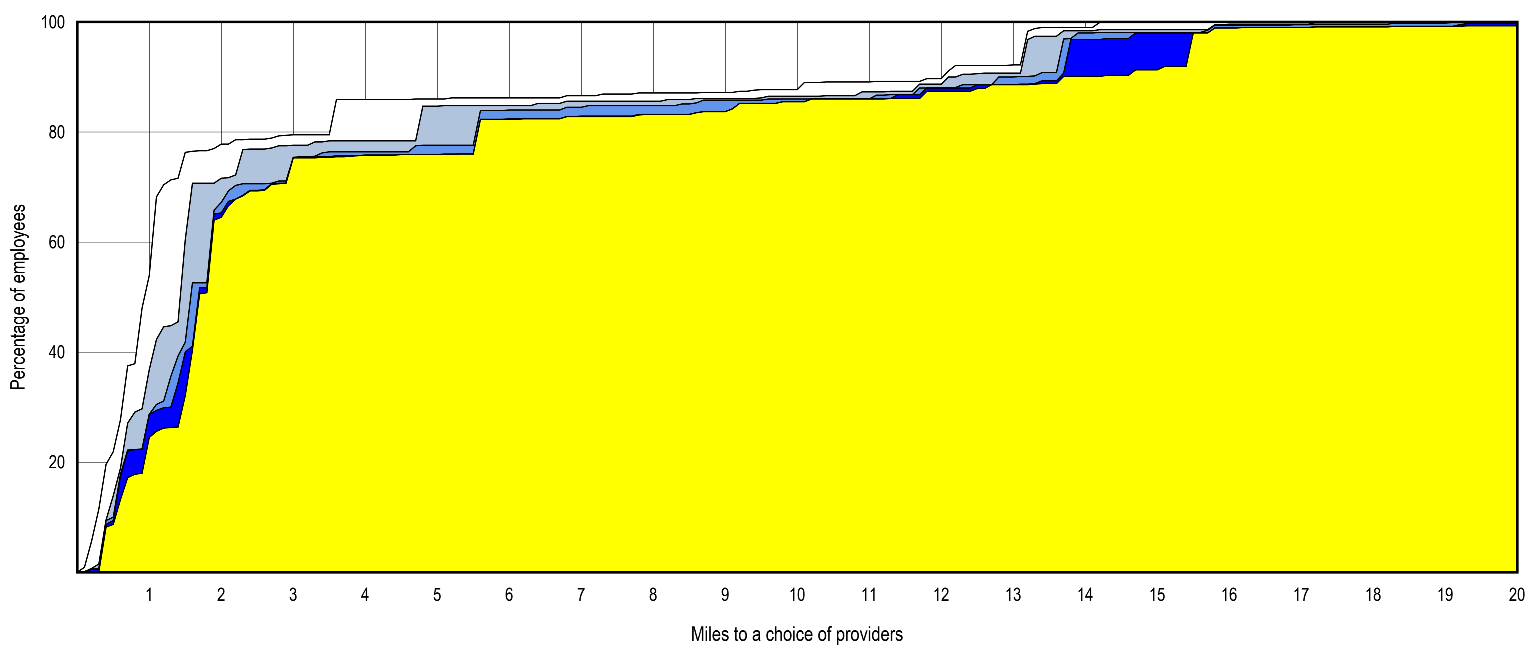
- 1,774 (100.0%) Employees with access
- 0 (0.0%) Employees without access
- 0 (0.0%) Employees excluded



Distances

	Average
Distance to 1st closest provider	2.6 miles
Distance to 2nd closest provider	3.1 miles
Distance to 3rd closest provider	3.5 miles
Distance to 4th closest provider	3.7 miles
Distance to 5th closest provider	3.9 miles

Access Standard Comparison



With Access Summary By City

September 1, 2021

Access Analysis
EAP Access Standards

Employee Group
All Williamson County Employees

Provider Group
PHD_MSW

Areas With Access
Top 36 Cities in the market, sorted by the number of employees with access

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

[2] Provider counts represent:
#: Provider access points

Employees With Access			
Employee Group	1,774 employees 1,774 (100.0%) employees with access	Provider Group	184,808 unique providers at 82,878 unique locations (389,356 total access points)

Key Geographic Areas

	City	Employee #	With Access[1] #	With Access[1] %	Counts[2] #	Average Distance 1
With Access	Georgetown, TX	490	490	100.0	99	1.1
	Round Rock, TX	235	235	100.0	246	0.7
	Austin, TX	137	137	100.0	3,761	0.8
	Leander, TX	119	119	100.0	18	3.4
	Jarrell, TX	108	108	100.0	0	13.2
	Cedar Park, TX	76	76	100.0	164	0.4
	Hutto, TX	69	69	100.0	23	0.4
	Killeen, TX	67	67	100.0	103	1.1
	Taylor, TX	65	65	100.0	5	0.7
	Liberty Hill, TX	60	60	100.0	7	0.6
	Pflugerville, TX	59	59	100.0	53	0.2
	Florence, TX	24	24	100.0	0	12.1
	Granger, TX	22	22	100.0	0	10.1
	Salado, TX	19	19	100.0	3	0.6
	Temple, TX	19	19	100.0	123	0.3
	Thorndale, TX	18	18	100.0	0	12.2
	Bartlett, TX	16	16	100.0	0	14.2
	Belton, TX	16	16	100.0	23	1.3
	Elgin, TX	14	14	100.0	6	0.3
	Bertram, TX	12	12	100.0	1	0.6
	Burnet, TX	10	10	100.0	3	2.2
	Thrall, TX	10	10	100.0	0	13.3
	Holland, TX	9	9	100.0	0	11.8
	Copperas Cove, TX	8	8	100.0	10	1.5
	Manor, TX	8	8	100.0	2	1.9
	Harker Heights, TX	7	7	100.0	63	0.6
	Weir, TX	7	7	100.0	0	6.8
	Rockdale, TX	6	6	100.0	2	0.3
	Kempner, TX	5	5	100.0	0	7.3
	Lexington, TX	4	4	100.0	1	5.2
	Troy, TX	4	4	100.0	0	9.4
	Coupland, TX	3	3	100.0	0	7.8
	Nolanville, TX	3	3	100.0	0	2.0
	Smithville, TX	3	3	100.0	0	13.4
	Waco, TX	3	3	100.0	377	2.1
	Briggs, TX	2	2	100.0	0	9.5

Without Access Summary By City

September 1, 2021

Access Analysis
EAP Access Standards

Employee Group
All Williamson County Employees

Provider Group
PHD_MSW

Areas Without Access
Bottom 36 Cities in the market, sorted by the number of employees without access

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

[2] Provider counts represent:
#: Provider access points

Employees Without Access			
Employee Group	1,774 employees 0 (0.0%) employees without access	**Provider Group**	184,808 unique providers at 82,878 unique locations (389,356 total access points)

Key Geographic Areas

	City	Employee	Without Access[1]		Counts[2]	Average Distance
		#	#	%	#	1
Without Access	No data that meets the criteria					

With Access Detail By Zip Code

September 1, 2021

Access Analysis
EAP Access Standards

Employee / Provider Groups
All Williamson County Employees
PHD_MSW

EAP Access Standards

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

Zip Code	Employee #	Counts #	With Access[1] #	With Access[1] %	Average Distance 1
75751	1	26	1	100.0	2.4
75840	1	31	1	100.0	1.4
75964	1	6	1	100.0	1.5
76501	2	21	2	100.0	1.4
76502	13	40	13	100.0	0.1
76504	4	37	4	100.0	0.5
76511	16	0	16	100.0	14.2
76513	16	23	16	100.0	1.3
76518	1	0	1	100.0	11.7
76522	8	10	8	100.0	1.5
76527	24	0	24	100.0	12.1
76528	1	9	1	100.0	0.6
76530	22	0	22	100.0	10.1
76531	1	6	1	100.0	0.3
76534	9	0	9	100.0	11.8
76537	108	0	108	100.0	13.2
76539	5	0	5	100.0	7.3
76541	1	31	1	100.0	0.1
76542	37	37	37	100.0	1.2
76543	8	17	8	100.0	2.8
76544	1	1	1	100.0	2.7
76547	1	0	1	100.0	0.0
76548	7	63	7	100.0	0.6
76549	20	18	20	100.0	0.5
76550	1	7	1	100.0	0.2
76554	2	0	2	100.0	2.0
76556	2	0	2	100.0	11.1
76559	3	0	3	100.0	2.0
76567	6	2	6	100.0	0.3
76569	1	0	1	100.0	9.2
76571	19	3	19	100.0	0.6
76573	2	0	2	100.0	10.4
76574	65	5	65	100.0	0.7
76577	18	0	18	100.0	12.2
76578	10	0	10	100.0	13.3
76579	4	0	4	100.0	9.4
76643	1	1	1	100.0	0.6
76655	1	0	1	100.0	4.2
76706	2	35	2	100.0	1.6
76708	1	46	1	100.0	3.0

Continued on next page...

With Access Detail By Zip Code

September 1, 2021

Access Analysis
EAP Access Standards

Employee / Provider Groups
All Williamson County Employees
PHD_MSW

EAP Access Standards

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

Employees With Access					
Zip Code	Employee	Counts	With Access[1]		Average Distance
	#	#	#	%	1
77044	1	6	1	100.0	3.0
77630	1	5	1	100.0	3.5
77857	1	0	1	100.0	13.0
78015	1	1	1	100.0	2.7
78504	1	45	1	100.0	0.4
78602	1	76	1	100.0	0.7
78605	12	1	12	100.0	0.6
78606	1	0	1	100.0	13.8
78608	2	0	2	100.0	9.5
78611	10	3	10	100.0	2.2
78612	1	1	1	100.0	7.2
78613	73	164	73	100.0	0.4
78615	3	0	3	100.0	7.8
78617	1	1	1	100.0	2.9
78621	14	6	14	100.0	0.3
78626	234	20	234	100.0	1.1
78627	10	0	10	100.0	1.1
78628	172	71	172	100.0	0.9
78630	3	0	3	100.0	0.3
78633	74	8	74	100.0	1.5
78634	69	23	69	100.0	0.4
78640	1	17	1	100.0	1.1
78641	113	17	113	100.0	3.6
78642	60	7	60	100.0	0.6
78643	1	1	1	100.0	4.7
78644	1	48	1	100.0	0.7
78645	6	1	6	100.0	1.0
78650	1	0	1	100.0	8.3
78653	8	2	8	100.0	1.9
78654	1	49	1	100.0	1.2
78659	1	1	1	100.0	8.7
78660	59	53	59	100.0	0.2
78664	70	121	70	100.0	0.7
78665	98	61	98	100.0	1.0
78666	1	56	1	100.0	0.2
78672	1	0	1	100.0	15.0
78673	2	0	2	100.0	9.2
78674	7	0	7	100.0	6.8
78681	67	64	67	100.0	0.3
78702	2	303	2	100.0	0.3

Continued on next page...

With Access Detail By Zip Code

September 1, 2021

Access Analysis
EAP Access Standards

Employee / Provider Groups
All Williamson County Employees
PHD_MSW

EAP Access Standards

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

Employees With Access					
Zip Code	Employee	Counts	With Access[1]		Average Distance
	#	#	#	%	1
78704	1	405	1	100.0	0.3
78717	15	7	15	100.0	0.7
78723	4	63	4	100.0	0.3
78724	5	5	5	100.0	1.1
78726	2	1	2	100.0	1.2
78727	10	6	10	100.0	0.2
78728	12	3	12	100.0	2.0
78729	14	13	14	100.0	0.7
78730	1	4	1	100.0	1.5
78731	4	67	4	100.0	0.5
78732	3	2	3	100.0	0.3
78734	3	5	3	100.0	1.3
78737	1	12	1	100.0	2.4
78739	1	3	1	100.0	0.6
78741	3	181	3	100.0	0.8
78744	2	92	2	100.0	2.2
78745	5	62	5	100.0	0.5
78746	2	129	2	100.0	0.9
78747	1	31	1	100.0	2.2
78748	1	49	1	100.0	0.2
78749	1	10	1	100.0	1.1
78750	4	42	4	100.0	0.8
78751	1	156	1	100.0	0.6
78752	2	21	2	100.0	0.3
78753	7	82	7	100.0	0.2
78754	5	14	5	100.0	0.9
78756	1	14	1	100.0	0.5
78757	7	22	7	100.0	0.2
78758	8	41	8	100.0	0.7
78759	8	192	8	100.0	0.5
78765	1	0	1	100.0	0.0
78947	4	1	4	100.0	5.2
78957	3	0	3	100.0	13.4
79915	1	1	1	100.0	1.6
Grand Totals	1,774	3,443	1,774	100.0	2.6

Without Access Detail By Zip Code

September 1, 2021

Access Analysis
EAP Access Standards

Employee / Provider Groups
All Williamson County Employees
PHD_MSW

EAP Access Standards

[1] The Access Standard is defined as (All Williamson County Employees) employees accessing:
1 (PHD_MSW) provider in 20 miles

Employees Without Access					
Zip Code	Employee	Counts	Without Access[1]		Average Distance
	#	#	#	%	1
No data that meets the criteria					

OPTUM®

Client Name Williamson County

Launch Date 1/1/2022

Task	Accountable	Due Date	Actual Date	Status	Implementation Comments	Milestone
Strategy planning, program review and Williamson County kick-off						
Notify all implementation stakeholders of the award of business	Optum	11/1/2021				
Schedule weekly implementation team meetings	Optum	11/5/2021				
Identify and schedule client specific meetings	Optum, Williamson County	11/5/2021				
Provide implementation project plan to Williamson County	Optum	11/9/2021				
Initial kickoff meeting with Williamson County to confirm product deliverables	Optum, Williamson County	11/9/2021				x
Confirm what programs require a program/company logo, if applicable	Optum, Williamson County	11/9/2021				
Obtain the logo from Williamson County	Optum, Williamson County	11/23/2021				
Ensure that legal contracts are in place; HIPAA and regulatory requirements are fulfilled						
Determine level of integration with external vendors	Optum, Williamson County	11/5/2021				
Identify all vendors referral processes that will require a legal agreement to protect Personal Health Information	Optum, Williamson County	11/5/2021				
Obtain legal contacts for Williamson County	Optum, Williamson County	11/9/2021				
Identify all confidentiality document needs and establish tracking timeline for Non-Disclosure Agreement(s)	Optum SAE	11/9/2021				
Ensure that all confidentiality agreements are finalized	Optum SAE	11/10/2021				
Ensure that all contracts are finalized	Optum, Williamson County	12/17/2021				x
Establish operational site infrastructure						
Site Infrastructure and Human Resource Planning						
Confirm site location	Optum Operations	11/12/2021				x
Develop staffing models for anticipated membership	Optum Operations	11/17/2021				
Design and test telecommunication strategy and phone scripting						
Confirm telecom requirements	Optum Telecom	11/17/2021				x
Determine if custom scripting is required	Optum, Williamson County	11/23/2021				
Sign-off on call flow	Optum, Williamson County	11/23/2021				x
Integrated Program Solutions and External Vendor Interfaces						

Identify external vendors and level of integration requested	Optum, Williamson County	11/9/2021				x
Determine integration points between Optum programs	Optum	11/9/2021				
Determine how data will be shared with external vendor (warm transfer, fax, email	Optum, Williamson County	11/17/2021				
Identify the client's vendors, programs, conditions, populations and determine how to communicate the new Optum services to the clients vendors	Optum, Williamson County	11/17/2021				
Schedule meeting with Williamson County to review information from vendors and determine business rules	Optum, Williamson County	11/23/2021				
Communicate the expectation of exchanging Personal Health Information (PHI) via the secure electronic means with Optum.	Optum, External Vendors	11/23/2021				
Review all processes with Williamson County to demonstrate member experience	Optum, Williamson County	11/29/2021				
Review interface process for all appropriate services	Optum, Williamson County	11/29/2021				
Review processes and determine if modification is needed for Williamson County specific requirements	Optum	11/29/2021				
Identify development needs for interfaces and processes	Optum	12/2/2021				
Develop corresponding job aids for new processes	Optum Operations	12/2/2021				
Test the vendor phone numbers provided by Williamson County	Optum	12/22/2021				
EAP/Work Life Services						
Overview meeting of the Employee Assistance Program	Optum, Williamson County	11/24/2021				
Overview meeting of Critical Incident Response (CIR) Services	Optum, Williamson County	12/8/2021				
Overview meeting of Management Consultant Services	Optum, Williamson County	12/8/2021				
LWW Demo and review site options	Optum, Williamson County	12/8/2021				
Determine current process with terminating vendor and see if any special notes	Optum	12/8/2021				
Overview of EAP and Self-Bill	Optum, Williamson County	12/14/2021				
LWW Member Portal Live	Optum	12/31/2021				x
Establish a Member Engagement Plan						
Confirm member engagement requirements	Optum	11/12/2021				
Determine Williamson County specific branding for communication materials; identify all materials requiring branding and develop production timeline	Optum, Williamson County	11/12/2021				
Determine the text, layout and draft the materials	Optum	11/17/2021				
Review and receive sign off on member communications and letters	Optum	11/17/2021				x
Complete customized materials for programs (if applicable)	Optum	12/17/2021				
Training						
Confirm training needs and start date	Optum	11/17/2021				
Deliver the final signed-off job aids to training, if applicable	Optum	11/23/2021				x
Conduct training	Optum Trainers	12/7/2021				

Deliver existing staff training as required	Optum Trainers	12/17/2021				
Deliver/collaborate on trainings with external vendor/carriers as required	Optum Trainers	12/17/2021				
Provide training on all programs to client's benefit team (client specific training)	Optum	12/17/2021				
Confirm completion of all training	Optum	12/28/2021				x
Establish reporting requirements						
Confirm reporting requirements and review with client	Optum, Williamson County	11/9/2021				x
Review standard process measures and metrics (i.e., activity, call stats) with Williamson County	Optum, Williamson County	11/12/2021				
Review outcome and metrics (i.e. clinical outcomes, financial outcomes) with Williamson County	Optum, Williamson County	11/12/2021				
Determine the method of transmission (FTP, secure e-mail or other for all program reporting	Optum	11/12/2021				
Document reporting requirements and send to Williamson County	Optum SAE	11/17/2021				
Ensure operational readiness						
Confirm site readiness (hardware, equipment & infrastructure in place)	Optum	12/14/2021				
Test phone lines	Optum	12/28/2021				x
Confirm training (internal and external) has been completed	Optum	12/28/2021				x
Pre-launch audit completed	Optum	12/31/2021				x
Schedule post-implementation assessment with Williamson County and consultant	Optum, Williamson County	12/31/2021				
Mitigate and review all known open issues	Optum	12/31/2021				
Post-Implementation						
Conduct post-implementation status meetings	Optum, Williamson County	2/2/2022				x
Review open items list and action plans	Optum	2/2/2022				
Implement audit/monitoring process	Optum	2/2/2022				

Williamson County Fee Quotation

For 1928 employees, on a 3-year rate guarantee, net of commission, we can provide the following rates:

- 3 visit EAP: $0.93 PEPM
- 6 visit EAP: $1.34 PEPM
- Worklife added to one of the rates above $0.19 PEPM
- ID Theft added to one of the rates above $0.07 PEPM

This includes an 8-hour bank for CIRS/Training. Additional hours can be purchased fee for service after the bank is exhausted at the following rates:

Specialized On-Site Support Service	Fee for Service
Management Development Programs	$200/on-site hour plus travel
Employee Development Programs	$200/on-site hour plus travel
Wellness Seminars	$200/on-site hour plus travel
Information Resource Events	$200/on-site hour plus travel
Critical Incident Response Services	$250/on-site hour plus travel
Travel Time & Trainer Downtime	$100/hour

Proposal Affidavit

Certification

The undersigned certifies that the RFP and the Respondent's Proposal have been carefully reviewed and are submitted as correct and final. Respondent further certifies and agrees to furnish any and/or all goods and/or services upon which prices are extended at the price Proposal, and upon the conditions contained in the RFP.

Non-Collusion

I hereby certify that the foregoing Proposal has not been prepared in collusion with any other Respondent or other person or persons engaged in the same line of business prior to the official opening of this Proposal. Further, I certify that the Respondent is not now, nor has been for the past six (6) months, directly or indirectly concerned in any pool or agreement or combination, to control the price of services/commodities Proposal on, or to influence any person or persons to submit a Proposal or not to submit a Proposal thereon.

Artemus Anderkay
Artemus Anderkay (Sep 1, 2021 15:14 CDT)

Artemus Anderkay
Director Finance

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This document is not applicable to Optum, which is not a government entity.

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. *See* Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 **Name of vendor who has a business relationship with local governmental entity.**

Optum

2 ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 **Name of local government officer about whom the information is being disclosed.**

____

Name of Officer

4 **Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

5 **Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

This document is not applicable to Optum, which is not a government entity.

Signature of vendor doing business with the governmental entity | Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

(A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;

(B) a transaction conducted at a price and subject to terms available to the public; or

(C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds $2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than $100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.