



OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

**Knox County Procurement Division
Addendum I to Request for Proposal #3548
Employee Assistance Services**

Addendum Date: April 11, 2024

Buyer: Christina Beeler

Opening Date: April 29, 2024 at 2:00 pm

Total Page(s): Thirty-seven (37) pages

The following is to be added:

Addition: Attachment A- Employee Zip Codes
Attachment B- Utilization Report 2022
Attachment C- Utilization Report 2023

The following is to be amended:

Delete: **TAB IX**

COST OF SERVICES

The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty six (36) months from the first day of the Contract period.

1. Administrative Fee: Please provide both a PEPM and a PEPM + per visit fee schedule. A visit will be defined as a face-to-face counseling session (excluding work-life services). If your organization has a preference, please indicate which payment model is preferred or write "Yes" for both models if neither is preferred. Knox County will be the sole party determining which payment model to execute in the final contract.
 - a. Preferred (Y/N): _____ PEPM Rate: _____
 - b. Preferred (Y/N): _____ PEPM Rate: _____ AND Per Visit Fee: _____
2. List all additional costs to the employer associated with initial and long-term program promotion to participants, including an itemization of any promotional materials not included in the administrative fee. Indicate whether costs are optional or required.
3. List all additional costs to the employer for services not already specified. Indicate whether costs are optional or required.
4. Additional Services: Knox County intends to allow the opportunity for eligible departments to purchase additional services through the contract resulting from this RFP, though nothing shall be construed as to prohibit Knox County or eligible departments from seeking these services elsewhere. Please provide pricing for the following buy-up options:
 - a. 1 hour of one-on-one annual employment counseling (initial employment, yearly mandatory, etc.)
 - b. 1 hour of on-site group counseling (for work-related, non-critical incident counseling)
 - c. 1 hour of on-site education or training
 - d. 1 hour of other on-site engagement/promotion of EAP services, mental health and work-life balance



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Add: **TAB IX**

COST OF SERVICES

The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty six (36) months from the first day of the Contract period.

5. Administrative Fee: Please provide both a PEPM and a PEPM + per visit fee schedule. A visit will be defined as a face-to-face counseling session (excluding work-life services). If your organization has a preference, please indicate which payment model is preferred or write "Yes" for both models if neither is preferred. Knox County will be the sole party determining which payment model to execute in the final contract.
 - a. Preferred (Y/N): _____ PEPM Rate: _____
 - b. Preferred (Y/N): _____ PEPM Rate: _____ AND Per Visit Fee: _____
6. List all additional costs to the employer associated with initial and long-term program promotion to participants, including an itemization of any promotional materials not included in the administrative fee. Indicate whether costs are optional or required.
7. List all additional costs to the employer for services not already specified. Indicate whether costs are optional or required.
8. Additional Services: Knox County intends to allow the opportunity for eligible departments to purchase additional services through the contract resulting from this RFP, though nothing shall be construed as to prohibit Knox County or eligible departments from seeking these services elsewhere. Please provide pricing for the following buy-up options:
 - a. One (1) hour of one-on-one annual employment counseling (initial employment, yearly mandatory, etc.)
 - b. One (1) hour of on-site group counseling (for work-related, non-critical incident counseling)
 - c. One (1) hour of on-site education or training
 - d. One (1) hour of other on-site engagement/promotion of EAP services, mental health and work-life balance
 - e. DOT Substance Abuse Professional (SAP) Evaluation. Provide the per evaluation rate.

The following is for Clarification:

Question 1: Are you able to share your current pricing?

Answer 1: \$1.79 PEPM

Question 2: Based on how many employees?

Answer 2: ≈3,000

Question 3: Based on what session model?

Answer 3: PEPM

Question 4: Are you able to share who your current vendor is?

Answer 4: ComPysch



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- Question 5:** Will you provide Zip Codes for Knox County to provide accurate provider counts in Tab VII #1.
Answer 5: Attachment A-Knox County Employee Zip Codes
- Question 6:** Will you provide Utilization.
Answer 6: (% Annualized) 2021- 6.81%, 2022- 4.77%, 2023- 4.77%
- Question 7:** Will you provide Census Data
Answer 7: Attachment A-Knox County Employee Zip Codes
- Question 8:** Please provide utilization reports for 2022 and 2023.
Answer 8: Please see Attachment B and C.
- Question 9:** How many onsite training hours are included currently? How many onsite hours were used each year?
Answer 9: Our current contract includes 20 training hours per contract year. We used 6 hours in 2022. Our goal is to have 1 training session per month, 12 per year.
- Question 10:** How many onsite critical incident response hours are included currently? How many onsite hours were used each year?
Answer 10: Unlimited number of critical incident responses with no maximum number of hours per response. To my knowledge, we have not used any hours during this current contract.
- Question 11:** How long has the current vendor provided EAP services to Knox?
Answer 11: Since 2019
- Question 12:** Are there specific areas of enhancement you are seeking at this time?
Answer 12: Faster turnaround time on counseling sessions.
- Question 13:** Why are you requesting this RFP at this time?
Answer 13: Contract expiration.
- Question 14:** What was the total dollar spent for the EAP in the most recent contract year?
Answer 14: \$62,308.11
- Question 15:** What was the total dollar spent for the EAP in the prior contract year?
Answer 15: \$63,280.08
- Question 16:** Could you provide recent utilization reports or provide utilization statistics?
Answer 16: Please see Attachment B and C.
- Question 17:** Could you provide the number of orientation, training, and benefit fair hours provided in the most recent contract year? How many of those hours were provided in person?
Answer 17: 16 hours/4 sessions in-person for benefits fairs
- Question 18:** How many hours are included annually in the current contract?
Answer 18: Our current contract includes 20 training hours per contract year. We used 6 training hours in 2022. Our goal is to have 1 training session per month, 12 per year.



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Question 19: In an effort to be a “green” company, we provide promotional materials electronically. If printed materials are desired, how many printed brochures and how many printed posters are requested annually?

Answer 19: 500

Question 20: What hours is Knox Procurement Office open for receipt of the proposal from FedEx?

Answer 20: Monday – Friday 8am to 4:30pm EST.

Question 21: Page 16 of RFP: COST OF SERVICES:

Administrative Fee: Please provide both a PEPM and a PEPM + per visit fee schedule. A visit will be defined as a face-to-face counseling session (excluding work-life services). If your organization has a preference, please indicate which payment model is preferred or write “Yes” for both models if neither is preferred. Knox County will be the sole party determining which payment model to execute in the final contract.

- a. Preferred (Y/N): _____ PEPM Rate: _____
b. Preferred (Y/N): _____ PEPM Rate: _____ AND Per Visit Fee: _____

Which model does Knox currently utilize?

Answer 21: PEPM

Question 22: Attachment B – some of the insurance requirements are not common within an EAP agreement. Would Knox consider removing 5, 6, and 7?

Answer 22: No

Question 23: Exhibit A – Termination - County may terminate this Contract with or without cause, upon written notice of not less than thirty (30) calendar days. Would Knox be agreeable to increasing this to 90 days?

Answer 23: No

End of Addendum #1.

Addendum must be acknowledged in Section V, Tab II of your submittal.

Christina Beeler
Senior Procurement Analyst, Knox County Procurement

City	State	Zip Code	Employee Count
PARK RIDGE	NJ	07656	1
NAPLES	FL	34112	1
FRANKLIN	TN	37064	1
NASHVILLE	TN	37218	1
DECATUR	TN	37322	1
MADISONVILLE	TN	37354	1
BLUFF CITY	TN	37618	1
PINEY FLATS	TN	37686	1
ALCOA	TN	37701	12
BLAINE	TN	37704	1
ANDERSONVILLE	TN	37705	8
BEAN STATION	TN	37708	3
BLAINE	TN	37709	18
BRICEVILLE	TN	37710	1
CLINTON	TN	37716	38
CORRYTON	TN	37721	178
COSBY	TN	37722	1
DANDRIDGE	TN	37725	21
FRIENDSVILLE	TN	37734	1
FRIENDSVILLE	TN	37737	8
GREENBACK	TN	37742	6
HARRIMAN	TN	37748	1
HEISKELL	TN	37754	18
HUNTSVILLE	TN	37756	1
JACKSBORO	TN	37757	3
JEFFERSON CITY	TN	37760	15
KINGSTON	TN	37763	6
KODAK	TN	37764	11
LAFOLLETTE	TN	37766	4
ROCKY TOP	TN	37769	4
LENOIR CITY	TN	37771	12
LENOIR CITY	TN	37772	13
LOUDON	TN	37774	6
LOUISVILLE	TN	37777	19
LUTTRELL	TN	37779	22
MARYVILLE	TN	37801	29
MARYVILLE	TN	37803	33
MARYVILLE	TN	37804	30
MASCOT	TN	37806	26
MAYNARDVILLE	TN	37807	49
MORRISTOWN	TN	37813	2
MORRISTOWN	TN	37814	10
NEW MARKET	TN	37820	16
NEWPORT	TN	37821	5
NEW TAZEWELL	TN	37825	4
NIOTA	TN	37826	1

NORRIS	TN	37828	6
OAK RIDGE	TN	37830	32
OLIVER SPRINGS	TN	37840	3
ONEIDA	TN	37841	2
PHILADELPHIA	TN	37846	2
POWDER SPRINGS	TN	37848	4
POWELL	TN	37849	143
ROCKFORD	TN	37853	6
ROCKWOOD	TN	37854	1
ROGERSVILLE	TN	37857	1
RUSSELLVILLE	TN	37860	2
RUTLEDGE	TN	37861	18
SEVIERVILLE	TN	37862	3
SEVIERVILLE	TN	37864	1
SEYMOUR	TN	37865	59
SHARPS CHAPEL	TN	37866	1
STRAWBERRY PLAINS	TN	37871	63
SUNBRIGHT	TN	37872	1
SWEETWATER	TN	37874	9
SEVIERVILLE	TN	37876	24
TALBOTT	TN	37877	7
TEN MILE	TN	37880	1
THORN HILL	TN	37881	1
TOWNSEND	TN	37882	3
VONORE	TN	37885	1
WALLAND	TN	37886	5
WASHBURN	TN	37888	6
WHITE PINE	TN	37890	4
KNOXVILLE	TN	37902	6
KNOXVILLE	TN	37909	61
KNOXVILLE	TN	37912	120
KNOXVILLE	TN	37914	128
KNOXVILLE	TN	37915	26
KNOXVILLE	TN	37916	5
KNOXVILLE	TN	37917	137
KNOXVILLE	TN	37918	324
KNOXVILLE	TN	37919	100
KNOXVILLE	TN	37920	216
KNOXVILLE	TN	37921	128
KNOXVILLE	TN	37922	91
KNOXVILLE	TN	37923	108
KNOXVILLE	TN	37924	121
KNOXVILLE	TN	37927	1
KNOXVILLE	TN	37928	2
KNOXVILLE	TN	37931	120
KNOXVILLE	TN	37932	64
KNOXVILLE	TN	37934	61

KNOXVILLE	TN	37938	135
KNOXVILLE	TN	37939	2
KNOXVILLE	TN	37940	2
KNOXVILLE	TN	37950	1
COVINGTON	TN	38019	1
COOKEVILLE	TN	38501	1
CROSSVILLE	TN	38555	1
HURST	TX	76054	1
		Grand Total	3016

STAY AHEAD of Productivity, Performance and Health Issues

Knox County

Quarterly Utilization Report
Reporting Period Q4 (10/1/2022 - 12/31/2022)

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Access To Services												
Telephone/Email Access												
EAP	23	100%	28	78%	18	86%	26	84%	95	86%	128	92%
FamilySource	0	0%	0	0%	1	5%	2	6%	3	3%	0	0%
FinancialConnect	0	0%	2	6%	1	5%	0	0%	3	3%	0	0%
LegalConnect	0	0%	6	17%	1	5%	3	10%	10	9%	11	8%
Sub Total	23		36		21		31		111		139	
Online Access												
EAP	16	34%	6	9%	17	40%	15	27%	54	26%	83	28%
FamilySource	9	19%	11	17%	8	19%	15	27%	43	20%	87	30%
FinancialConnect	5	11%	1	2%	2	5%	0	0%	8	4%	33	11%
GlobalConnect	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Health & Wellness	4	9%	2	3%	0	0%	9	16%	15	7%	38	13%
Health Care Navigation	0	0%	0	0%	0	0%	0	0%	0	0%	4	1%
LegalConnect	13	28%	45	69%	16	37%	16	29%	90	43%	46	16%
Sub Total	47		65		43		55		210		293	
Combined Access												
EAP	39	56%	34	34%	35	55%	41	48%	149	46%	211	49%
FamilySource	9	13%	11	11%	9	14%	17	20%	46	14%	87	20%
FinancialConnect	5	7%	3	3%	3	5%	0	0%	11	3%	33	8%
GlobalConnect	0	0%	0	0%	0	0%	0	0%	0	0%	2	0%
Health & Wellness	4	6%	2	2%	0	0%	9	10%	15	5%	38	9%
Health Care Navigation	0	0%	0	0%	0	0%	0	0%	0	0%	4	1%
LegalConnect	13	19%	51	50%	17	27%	19	22%	100	31%	57	13%
Total	70		101		64		86		321		432	
Additional EAP Services												
Critical Incident Debriefing Sessions (number is excluded from overall utilization counts)	0		0		0		0		0		0	
Critical Incident Debriefing Event Participants	0		0		0		0		0		0	
Training Sessions (number is excluded from overall utilization counts)	0		0		0		0		0		6	
Training Session Participants	0		0		0		0		0		62	
Total Utilization	70		101		64		86		321		494	

	Q1	Q2	Q3	Q4	Year To Date	Last Year
Utilization Results						
Total Utilization Rate (% - Annualized)	9.03%	13.03%	8.26%	11.10%	10.35%	15.94%
Live Utilization Rate (% - Annualized)	2.97%	4.65%	2.71%	4.00%	3.58%	4.48%
GRO Utilization Rate (% - Annualized)	6.06%	8.39%	5.55%	7.10%	6.77%	9.45%
Other Utilization Rate (% - Annualized)	0.00%	0.00%	0.00%	0.00%	0.00%	2.00%
<i>Based on Quarterly Average Employee Counts</i>	3,100	3,100	3,100	3,100	3,100	3,100
Case Closure (only EAP cases)						
Resolved within EAP	19 95%	13 100%	0 0%	2 100%	34 97%	123 98%
Referred to benefits resource Outpatient	1 5%	0 0%	0 0%	0 0%	1 3%	3 2%
Total	20	13	0	2	35	126

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Referral Source												
Brochure	0	0%	3	8%	0	0%	4	13%	7	6%	10	7%
Decline	1	4%	3	8%	1	5%	3	10%	8	7%	10	7%
EAP Connect	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Email	1	4%	0	0%	0	0%	0	0%	1	1%	5	4%
Employee Health & Safety	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Family	4	17%	2	6%	0	0%	3	10%	9	8%	11	8%
Flyer	0	0%	0	0%	0	0%	0	0%	0	0%	6	4%
Formal Referral	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
GuidanceResources Online	1	4%	1	3%	1	5%	0	0%	3	3%	2	1%
HR	0	0%	1	3%	0	0%	1	3%	2	2%	23	17%
Internal	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Internet / Intranet	0	0%	0	0%	0	0%	0	0%	0	0%	3	2%
Online - Ask the Expert	0	0%	3	8%	0	0%	1	3%	4	4%	1	1%
Other	2	9%	0	0%	2	10%	1	3%	5	5%	4	3%
Peer	0	0%	1	3%	2	10%	0	0%	3	3%	3	2%
Previous GR User	3	13%	3	8%	2	10%	0	0%	8	7%	15	11%
Supervisor/Manager	5	22%	2	6%	1	5%	3	10%	11	10%	1	1%
Training	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Unknown	6	26%	17	47%	12	57%	15	48%	50	45%	39	28%
Sub Total	23		36		21		31		111		139	
Client Status												
Employee	14	61%	26	72%	16	76%	23	74%	79	71%	105	76%
Claimant	1	4%	0	0%	0	0%	0	0%	1	1%	0	0%
Dependent	5	22%	5	14%	5	24%	6	19%	21	19%	27	19%
Member	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Other	0	0%	1	3%	0	0%	0	0%	1	1%	0	0%
Spouse	3	13%	4	11%	0	0%	2	6%	9	8%	5	4%
Unknown	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Sub Total	23		36		21		31		111		139	
Client Gender												
Decline	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Female	11	48%	17	47%	8	38%	16	52%	52	47%	80	58%
Male	11	48%	14	39%	10	48%	15	48%	50	45%	57	41%
Not Specified	0	0%	3	8%	3	14%	0	0%	6	5%	0	0%
Other	1	4%	2	6%	0	0%	0	0%	3	3%	1	1%
Sub Total	23		36		21		31		111		139	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Client Age Group												
0-12	1	4%	2	6%	0	0%	2	6%	5	5%	12	9%
13-19	3	13%	1	3%	3	14%	2	6%	9	8%	10	7%
20-29	0	0%	4	11%	1	5%	6	19%	11	10%	24	17%
30-39	10	43%	5	14%	4	19%	7	23%	26	23%	19	14%
40-49	4	17%	4	11%	5	24%	3	10%	16	14%	28	20%
50-59	2	9%	6	17%	3	14%	2	6%	13	12%	23	17%
60 +	2	9%	5	14%	2	10%	7	23%	16	14%	9	6%
Unknown	1	4%	8	22%	2	10%	2	6%	13	12%	9	6%
Decline	0	0%	1	3%	1	5%	0	0%	2	2%	5	4%
Sub Total	23		36		21		31		111		139	

Employee Job Category (employee data only)												
Administration	1	7%	1	4%	0	0%	0	0%	2	3%	7	7%
Branch Office Assistant	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Correction Officer	1	7%	0	0%	0	0%	1	4%	2	3%	1	1%
Declined	4	29%	18	69%	9	56%	14	61%	45	57%	36	34%
Dispatch	0	0%	0	0%	1	6%	0	0%	1	1%	3	3%
Laborer	1	7%	0	0%	0	0%	0	0%	1	1%	0	0%
Management	0	0%	1	4%	1	6%	1	4%	3	4%	4	4%
Office / Clerical	0	0%	0	0%	0	0%	1	4%	1	1%	0	0%
Physician	0	0%	0	0%	0	0%	1	4%	1	1%	0	0%
Police Officer	2	14%	1	4%	0	0%	1	4%	4	5%	6	6%
Professional	5	36%	3	12%	1	6%	3	13%	12	15%	36	34%
Public Safety	0	0%	0	0%	1	6%	0	0%	1	1%	2	2%
Sales	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Service	0	0%	1	4%	3	19%	1	4%	5	6%	4	4%
Technical	0	0%	1	4%	0	0%	0	0%	1	1%	4	4%
Sub Total	14		26		16		23		79		105	

Employee Job Tenure (employee data only)												
Less than 1 year	0	0%	0	0%	0	0%	0	0%	0	0%	10	10%
1 - 4 years	8	57%	4	15%	1	6%	4	17%	17	22%	24	23%
5 - 9 years	0	0%	1	4%	1	6%	2	9%	4	5%	9	9%
10 - 14 years	1	7%	1	4%	3	19%	0	0%	5	6%	6	6%
15 - 19 years	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
20+ years	1	7%	1	4%	1	6%	2	9%	5	6%	12	11%
Unknown	2	14%	18	69%	10	63%	11	48%	41	52%	28	27%
Decline	2	14%	1	4%	0	0%	4	17%	7	9%	15	14%
Sub Total	14		26		16		23		79		105	

	Q1	Q2	Q3	Q4	Year To Date	Last Year
GRA User Count						
GRA Unique Users	21	29	20	27	92	111

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Employee Assistance Program[®]												
U.S. Services												
Primary Issue Presented												
Alcohol/Related	0	0%	0	0%	0	0%	1	4%	1	1%	0	0%
Anger Issues	0	0%	4	14%	0	0%	1	4%	5	5%	5	4%
Anxiety Related	4	17%	3	11%	0	0%	8	31%	15	16%	16	13%
Bereavement/Grief	1	4%	2	7%	0	0%	3	12%	6	6%	6	5%
Dating Violence	0	0%	1	4%	0	0%	0	0%	1	1%	0	0%
Depression Related	6	26%	5	18%	2	11%	0	0%	13	14%	15	12%
Domestic Violence	0	0%	0	0%	0	0%	0	0%	0	0%	2	2%
Family Violence	0	0%	0	0%	1	6%	0	0%	1	1%	0	0%
Family/Child	0	0%	3	11%	2	11%	2	8%	7	7%	4	3%
Family/Child - Behavioral Issues	0	0%	0	0%	0	0%	1	4%	1	1%	3	2%
Family/Child - Family Issues	2	9%	2	7%	0	0%	0	0%	4	4%	10	8%
Health Crisis	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Interpersonal Issues	0	0%	0	0%	2	11%	0	0%	2	2%	5	4%
Occupational - Interpersonal	0	0%	0	0%	1	6%	0	0%	1	1%	0	0%
Occupational - Performance	0	0%	0	0%	0	0%	0	0%	0	0%	4	3%
Partner/Relationship	1	4%	2	7%	5	28%	4	15%	12	13%	22	17%
Psychological	4	17%	2	7%	2	11%	3	12%	11	12%	16	13%
Sexual Assault	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Stress	3	13%	4	14%	3	17%	2	8%	12	13%	15	12%
Substance Use Related	1	4%	0	0%	0	0%	1	4%	2	2%	0	0%
Trauma	1	4%	0	0%	0	0%	0	0%	1	1%	2	2%
Sub-Total Issues	23		28		18		26		95		127	

Consultation Type												
Face to Face	17	74%	13	46%	8	44%	15	58%	53	56%	105	83%
Telephone	1	4%	9	32%	8	44%	8	31%	26	27%	7	6%
Video	4	17%	3	11%	2	11%	1	4%	10	11%	10	8%
BehavioralExpert	1	4%	3	11%	0	0%	2	8%	6	6%	4	3%
Supervisor / Management Consult	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Sub-Total - Consultations	23		28		18		26		95		127	

Local National

	Q1	Q2	Q3	Q4	Year To Date	Last Year
Primary Issue Presented						
Bereavement/Grief	0 0%	0 0%	0 0%	0 0%	0 0%	1 100%
Sub-Total Issues	0	0	0	0	0	1
Consultation Type						
Face to Face	0 0%	0 0%	0 0%	0 0%	0 0%	1 100%
Sub-Total - Consultations	0	0	0	0	0	1
Total Number of Issues	23	28	18	26	95	128
Online Services						
Total Online Services	16	6	17	15	54	83
Total Product Utilization	39	34	35	41	149	211
Employee Count						
Total Utilization Rate (% - Annualized)	5.03%	4.39%	4.52%	5.29%	4.81%	6.81%
<i>Based on Quarterly Average employees</i>	3,100	3,100	3,100	3,100	3,100	3,100

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
FamilySource[®]												
U.S. Services												
Primary Issue Presented												
Elder Care-Consultation	0	0%	0	0%	0	0%	2	100%	2	67%	0	0%
Home Improvement-Carpenter	0	0%	0	0%	1	100%	0	0%	1	33%	0	0%
Sub-Total Issues	0		0		1		2		3		0	
Total Number of Issues	0		0		1		2		3		0	
Online Services												
Total Online Services	9	100%	11	100%	8	100%	15	100%	43	100%	87	100%
Total Online Services	9		11		8		15		43		87	
Total Product Utilization	9		11		9		17		46		87	
Employee Count												
Total Utilization Rate (% - Annualized)	1.16%		1.42%		1.16%		2.19%		1.48%		2.81%	
<i>Based on Quarterly Average employees</i>	3,100		3,100		3,100		3,100		3,100		3,100	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
LegalConnect[®]												
U.S. Services												
Primary Issue Presented												
Consumer	0	0%	1	17%	0	0%	0	0%	1	10%	0	0%
Divorce / Separation	0	0%	0	0%	0	0%	0	0%	0	0%	3	27%
Education	0	0%	0	0%	0	0%	0	0%	0	0%	1	9%
Family Law	0	0%	1	17%	1	100%	1	33%	3	30%	1	9%
Personal Injury	0	0%	1	17%	0	0%	0	0%	1	10%	2	18%
Probate	0	0%	1	17%	0	0%	0	0%	1	10%	1	9%
Real Estate	0	0%	1	17%	0	0%	1	33%	2	20%	1	9%
Visitation	0	0%	0	0%	0	0%	1	33%	1	10%	0	0%
Wills	0	0%	1	17%	0	0%	0	0%	1	10%	2	18%
Sub-Total Issues	0		6		1		3		10		11	
Consultation Type												
Ask the Expert	0	0%	0	0%	0	0%	1	33%	1	10%	0	0%
Consultation and referral (main source)	0	0%	3	50%	1	100%	2	67%	6	60%	6	55%
Consultation only	0	0%	2	33%	0	0%	0	0%	2	20%	2	18%
Other	0	0%	1	17%	0	0%	0	0%	1	10%	3	27%
Sub-Total - Consultations	0		6		1		3		10		11	
Total Number of Issues	0		6		1		3		10		11	
Online Services												
Total Online Services	13	100%	45	100%	16	100%	16	100%	90	100%	46	100%
Total Online Services	13		45		16		16		90		46	
Total Product Utilization	13		51		17		19		100		57	

	Q1	Q2	Q3	Q4	Year To Date	Last Year
Employee Count						
Total Utilization Rate (% - Annualized)	1.68%	6.58%	2.19%	2.45%	3.23%	1.84%
<i>Based on Quarterly Average employees</i>	3,100	3,100	3,100	3,100	3,100	3,100

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
FinancialConnectSM												
U.S. Services												
Primary Issue Presented												
General Financial	0	0%	1	50%	0	0%	0	0%	1	33%	0	0%
Mortgages, credit card & other debt	0	0%	0	0%	1	100%	0	0%	1	33%	0	0%
Student Loan Debt	0	0%	1	50%	0	0%	0	0%	1	33%	0	0%
Sub-Total Issues	0		2		1		0		3		0	
Consultation Type												
Consultation and referral (other source)	0	0%	1	50%	0	0%	0	0%	1	33%	0	0%
Consultation only	0	0%	1	50%	1	100%	0	0%	2	67%	0	0%
Sub-Total - Consultations	0		2		1		0		3		0	
Total Number of Issues	0		2		1		0		3		0	
Online Services												
Total Online Services	5	100%	1	100%	2	100%	0	0%	8	100%	33	100%
Total Online Services	5		1		2		0		8		33	
Total Product Utilization	5		3		3		0		11		33	
Employee Count												
Total Utilization Rate (% - Annualized)	0.65%		0.39%		0.39%		0.00%		0.35%		1.06%	
<i>Based on Quarterly Average employees</i>	3,100		3,100		3,100		3,100		3,100		3,100	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
GuidanceResources Online [®]												
GRO User Counts												
Registered Users	19		17		8		10		54		73	
Repeat Users	12		13		12		13		40		49	
Unique Users	26		24		19		18		73		91	
Device Usage Counts (Logins and Registrations)												
APP	10	11%	2	4%	4	13%	1	3%	17	9%	31	11%
Desktop Browser	68	75%	31	65%	19	61%	16	55%	134	67%	196	72%
Mobile Browser	13	14%	15	31%	8	26%	12	41%	48	24%	47	17%
Total logins and Registrations	91		48		31		29		199		274	
English USA Usage												
Online Topics												
Financial												
Consumer Issues	2	5%	3	8%	0	0%	2	5%	7	4%	4	2%
Debt & Bankruptcy	2	5%	0	0%	0	0%	0	0%	2	1%	9	4%
Insurance	2	5%	0	0%	0	0%	0	0%	2	1%	4	2%
Personal Finance	0	0%	1	3%	2	5%	0	0%	3	2%	4	2%
Tax	0	0%	0	0%	0	0%	0	0%	0	0%	5	2%
Home & Auto												
Driver Safety & Education	0	0%	4	11%	0	0%	0	0%	4	2%	0	0%
Home Improvement & Maintenance	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Legal												
Criminal Law	0	0%	2	6%	0	0%	0	0%	2	1%	0	0%
Debt & Bankruptcy	0	0%	0	0%	2	5%	0	0%	2	1%	3	1%
Estate Planning & Elder Law	8	19%	2	6%	0	0%	7	16%	17	10%	4	2%
Family Law	0	0%	0	0%	10	24%	2	5%	12	7%	18	8%
Lawyers & Court	0	0%	2	6%	2	5%	0	0%	4	2%	1	0%
Personal Injury & Health Law	0	0%	4	11%	0	0%	0	0%	4	2%	1	0%
Real Estate	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Lifestyle												
Pets	0	0%	0	0%	0	0%	0	0%	0	0%	7	3%
Shopping & Consumer Rights	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Relationships												
Child Care	0	0%	2	6%	0	0%	0	0%	2	1%	1	0%
Divorce & Domestic Issues	0	0%	0	0%	1	2%	0	0%	1	1%	17	7%
Elder Care	0	0%	0	0%	0	0%	0	0%	0	0%	4	2%

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Marriage & Relationships	8	19%	1	3%	8	20%	7	16%	24	15%	14	6%
Parenting	2	5%	2	6%	0	0%	0	0%	4	2%	3	1%
Special Needs & Gifted Children	0	0%	2	6%	0	0%	0	0%	2	1%	0	0%
Wellness												
Addiction	0	0%	0	0%	4	10%	12	28%	16	10%	13	6%
Emotional Well-being	9	21%	2	6%	4	10%	7	16%	22	13%	57	25%
Fitness & Nutrition	0	0%	0	0%	0	0%	0	0%	0	0%	7	3%
Grief & Loss	0	0%	2	6%	0	0%	4	9%	6	4%	13	6%
Personal Growth	1	2%	1	3%	2	5%	0	0%	4	2%	8	3%
Personal Safety	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Physical Health	0	0%	0	0%	0	0%	0	0%	0	0%	10	4%
Pregnancy	0	0%	2	6%	0	0%	0	0%	2	1%	0	0%
Stress & Anger Management	3	7%	1	3%	6	15%	1	2%	11	7%	9	4%
Work & Education												
Career Development	2	5%	2	6%	0	0%	0	0%	4	2%	1	0%
College & Graduate School	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
In the Workplace	2	5%	0	0%	0	0%	0	0%	2	1%	4	2%
K-12 School	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Manager Guidance	2	5%	0	0%	0	0%	0	0%	2	1%	0	0%
Personal Development	0	0%	1	3%	0	0%	1	2%	2	1%	1	0%
Working Abroad												
Living & Working Abroad	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Relocation	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
	43		36		41		43		163		232	

On-Demand Trainings

Are You Financially on Track for Retirement?	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%
Balancing Work And Life	0	0%	0	0%	0	0%	6	100%	6	100%	1	11%
Coping With a Crisis or Traumatic Event	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%
Exercise At Your Desk	0	0%	0	0%	0	0%	0	0%	0	0%	3	33%
Living with Change	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%
Managing Emotions in the Workplace	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%
Stress - A Way of Life or Fact of Life?	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%
	0		0		0		6		6		9	

Online Centers

Grief and Bereavement	0	0%	0	0%	0	0%	1	100%	1	100%	0	0%
Tips for Saving Money	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%
	0		0		0		1		1		1	

Online Searches Topics

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Certified Financial Planner	1	25%	0	0%	0	0%	0	0%	1	3%	4	8%
Child Care Provider	0	0%	0	0%	0	0%	0	0%	0	0%	26	51%
College and University	0	0%	0	0%	0	0%	0	0%	0	0%	1	2%
Elder Care Provider	0	0%	0	0%	0	0%	0	0%	0	0%	3	6%
Lawyer	3	75%	29	100%	2	100%	5	100%	39	98%	17	33%
	4		29		2		5		40		51	
Online Asset Type												
Article	26	55%	27	42%	33	77%	20	36%	106	50%	162	55%
Assessment	4	9%	1	2%	1	2%	5	9%	11	5%	27	9%
Merchandise	2	4%	3	5%	0	0%	2	4%	7	3%	9	3%
Multimedia	3	6%	3	5%	1	2%	7	13%	14	7%	19	6%
On-Demand Trainings	0	0%	0	0%	0	0%	6	11%	6	3%	9	3%
Online Centers	0	0%	0	0%	0	0%	1	2%	1	0%	1	0%
Resource	7	15%	2	3%	6	14%	9	16%	24	11%	15	5%
Search Database	4	9%	29	45%	2	5%	5	9%	40	19%	51	17%
Survey	1	2%	0	0%	0	0%	0	0%	1	0%	0	0%
Total Activity Types	47		65		43		55		210		293	
Total Product Utilization	47		65		43		55		210		293	

STAY AHEAD of Productivity, Performance and Health Issues

Knox County

Quarterly Utilization Report
Reporting Period Q4 (10/1/2023 - 12/31/2023)

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Access To Services												
Telephone/Email Access												
EAP	35	81%	22	85%	13	93%	19	90%	89	86%	94	85%
FamilySource	3	7%	0	0%	0	0%	0	0%	3	3%	3	3%
FinancialConnect	0	0%	0	0%	0	0%	0	0%	0	0%	3	3%
LegalConnect	5	12%	4	15%	1	7%	2	10%	12	12%	10	9%
Sub Total	43		26		14		21		104		110	
Online Access												
EAP	14	24%	16	36%	17	25%	12	24%	59	27%	54	26%
FamilySource	24	41%	14	31%	26	39%	13	27%	77	35%	43	20%
FinancialConnect	4	7%	3	7%	9	13%	7	14%	23	10%	8	4%
Health and Well-Being	0	0%	6	13%	1	1%	1	2%	8	4%	15	7%
Health Care Navigation	0	0%	0	0%	2	3%	0	0%	2	1%	0	0%
LegalConnect	17	29%	6	13%	12	18%	16	33%	51	23%	90	43%
Sub Total	59		45		67		49		220		210	
Combined Access												
EAP	49	48%	38	54%	30	37%	31	44%	148	46%	148	46%
FamilySource	27	26%	14	20%	26	32%	13	19%	80	25%	46	14%
FinancialConnect	4	4%	3	4%	9	11%	7	10%	23	7%	11	3%
Health and Well-Being	0	0%	6	8%	1	1%	1	1%	8	2%	15	5%
Health Care Navigation	0	0%	0	0%	2	2%	0	0%	2	1%	0	0%
LegalConnect	22	22%	10	14%	13	16%	18	26%	63	19%	100	31%
Total	102		71		81		70		324		320	
Additional EAP Services												
Critical Incident Debriefing Sessions (number is excluded from overall utilization counts)	0		0		0		0		0		0	
Critical Incident Debriefing Event Participants	0		0		0		0		0		0	
Health Fairs Events (number is excluded from overall utilization counts)	0		0		0		4		4		0	
Total Utilization	102		71		81		70		324		320	

	Q1	Q2	Q3	Q4	Year To Date	Last Year
Utilization Results						
Total Utilization Rate (% - Annualized)	13.16%	9.16%	10.45%	9.03%	10.45%	10.32%
Live Utilization Rate (% - Annualized)	5.55%	3.35%	1.81%	2.71%	3.35%	3.55%
GRO Utilization Rate (% - Annualized)	7.61%	5.81%	8.65%	6.32%	7.10%	6.77%
Other Utilization Rate (% - Annualized)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<i>Based on Quarterly Average Employee Counts</i>	3,100	3,100	3,100	3,100	3,100	3,100
Case Closure (only EAP cases)						
Resolved within EAP	25 100%	13 100%	6 100%	4 100%	48 100%	68 99%
Referred to benefits resource Outpatient	0 0%	0 0%	0 0%	0 0%	0 0%	1 1%
Total	25	13	6	4	48	69

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Referral Source												
Brochure	2	5%	0	0%	0	0%	0	0%	2	2%	7	6%
Cross Referral	1	2%	0	0%	0	0%	0	0%	1	1%	0	0%
Decline	2	5%	1	4%	0	0%	0	0%	3	3%	8	7%
EAP Connect	0	0%	0	0%	0	0%	1	5%	1	1%	0	0%
Email	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Family	0	0%	0	0%	0	0%	0	0%	0	0%	9	8%
Flyer	1	2%	0	0%	0	0%	1	5%	2	2%	0	0%
GuidanceResources Online	2	5%	1	4%	0	0%	0	0%	3	3%	3	3%
HR	3	7%	2	8%	2	14%	0	0%	7	7%	2	2%
Internet / Intranet	1	2%	0	0%	0	0%	0	0%	1	1%	0	0%
Online - Ask the Expert	3	7%	2	8%	2	14%	1	5%	8	8%	4	4%
Other	1	2%	0	0%	1	7%	1	5%	3	3%	5	5%
Peer	0	0%	0	0%	0	0%	0	0%	0	0%	3	3%
Previous GR User	2	5%	4	15%	3	21%	1	5%	10	10%	7	6%
Supervisor/Manager	0	0%	1	4%	1	7%	3	14%	5	5%	11	10%
Unknown	25	58%	15	58%	5	36%	13	62%	58	56%	50	45%
Sub Total	43		26		14		21		104		110	
Client Status												
Employee	29	67%	18	69%	9	64%	11	52%	67	64%	78	71%
Claimant	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Dependent	11	26%	7	27%	3	21%	7	33%	28	27%	21	19%
Other	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Spouse	2	5%	1	4%	1	7%	2	10%	6	6%	9	8%
Unknown	1	2%	0	0%	1	7%	1	5%	3	3%	0	0%
Sub Total	43		26		14		21		104		110	
Client Gender												
Decline	1	2%	0	0%	0	0%	1	5%	2	2%	0	0%
Female	23	53%	20	77%	3	21%	8	38%	54	52%	52	47%
Male	17	40%	6	23%	10	71%	11	52%	44	42%	49	45%
Not Specified	2	5%	0	0%	1	7%	1	5%	4	4%	6	5%
Other	0	0%	0	0%	0	0%	0	0%	0	0%	3	3%
Sub Total	43		26		14		21		104		110	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Client Age Group												
0-12	2	5%	2	8%	1	7%	2	10%	7	7%	5	5%
13-19	4	9%	5	19%	2	14%	5	24%	16	15%	9	8%
20-29	4	9%	4	15%	1	7%	5	24%	14	13%	11	10%
30-39	12	28%	2	8%	4	29%	2	10%	20	19%	25	23%
40-49	10	23%	3	12%	1	7%	1	5%	15	14%	16	15%
50-59	4	9%	5	19%	0	0%	0	0%	9	9%	13	12%
60 +	2	5%	3	12%	3	21%	4	19%	12	12%	16	15%
Unknown	3	7%	1	4%	2	14%	2	10%	8	8%	13	12%
Decline	2	5%	1	4%	0	0%	0	0%	3	3%	2	2%
Sub Total	43		26		14		21		104		110	
Employee Job Category (employee data only)												
Administration	0	0%	0	0%	0	0%	0	0%	0	0%	2	3%
Correction Officer	0	0%	0	0%	0	0%	0	0%	0	0%	2	3%
Crime Scene Specialist	0	0%	1	6%	0	0%	0	0%	1	1%	0	0%
Declined	17	59%	11	61%	3	33%	7	64%	38	57%	45	58%
Dispatch	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Home Office	1	3%	0	0%	0	0%	0	0%	1	1%	0	0%
Laborer	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Management	2	7%	0	0%	0	0%	0	0%	2	3%	3	4%
Nurse	0	0%	1	6%	0	0%	0	0%	1	1%	0	0%
Office / Clerical	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Physician	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Police Officer	3	10%	0	0%	2	22%	1	9%	6	9%	3	4%
Professional	4	14%	4	22%	4	44%	3	27%	15	22%	12	15%
Public Safety	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Service	2	7%	1	6%	0	0%	0	0%	3	4%	5	6%
Technical	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Sub Total	29		18		9		11		67		78	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Employee Job Tenure (employee data only)												
Less than 1 year	2	7%	1	6%	1	11%	0	0%	4	6%	0	0%
1 - 4 years	2	7%	2	11%	0	0%	1	9%	5	7%	16	21%
5 - 9 years	4	14%	1	6%	1	11%	1	9%	7	10%	4	5%
10 - 14 years	0	0%	0	0%	2	22%	0	0%	2	3%	5	6%
15 - 19 years	0	0%	0	0%	1	11%	0	0%	1	1%	0	0%
20+ years	1	3%	1	6%	2	22%	3	27%	7	10%	5	6%
Unknown	20	69%	10	56%	2	22%	5	45%	37	55%	41	53%
Decline	0	0%	3	17%	0	0%	1	9%	4	6%	7	9%
Sub Total	29		18		9		11		67		78	
GRA User Count - Unique User by Product												
GRA Unique Users	35		20		12		18		79		92	
EAP	30		17		11		16		69		81	
FamilySource	1		0		0		0		1		2	
FinancialConnect	0		0		0		0		0		3	
LegalConnect	5		4		1		2		12		10	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Employee Assistance Program[®]												
U.S. Services												
Primary Issue Presented												
Alcohol/Related	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Anger Issues	0	0%	0	0%	0	0%	0	0%	0	0%	5	5%
Anxiety Related	6	17%	10	45%	1	8%	2	11%	19	21%	15	16%
Attention Issues	0	0%	0	0%	0	0%	1	5%	1	1%	0	0%
Bereavement/Grief	1	3%	0	0%	2	15%	4	21%	7	8%	6	6%
Dating Violence	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Depression Related	1	3%	2	9%	0	0%	0	0%	3	3%	12	13%
Family Violence	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Family/Child	0	0%	0	0%	0	0%	0	0%	0	0%	7	7%
Family/Child - Behavioral Issues	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Family/Child - Family Issues	1	3%	0	0%	0	0%	0	0%	1	1%	4	4%
Interpersonal Issues	1	3%	0	0%	2	15%	0	0%	3	3%	2	2%
Occupational - Interpersonal	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Partner/Relationship	8	23%	2	9%	2	15%	3	16%	15	17%	12	13%
Psychological	6	17%	2	9%	2	15%	2	11%	12	13%	11	12%
Stress	7	20%	6	27%	3	23%	6	32%	22	25%	12	13%
Substance Use Related	0	0%	0	0%	0	0%	0	0%	0	0%	2	2%
Trauma	3	9%	0	0%	1	8%	1	5%	5	6%	1	1%
Workplace Trauma	1	3%	0	0%	0	0%	0	0%	1	1%	0	0%
Sub Total	35		22		13		19		89		94	
Consultation Type												
Face to Face	15	43%	12	55%	9	69%	10	53%	46	52%	52	55%
Telephone	15	43%	8	36%	2	15%	6	32%	31	35%	26	28%
Video	3	9%	2	9%	1	8%	2	11%	8	9%	10	11%
BehavioralExpert	1	3%	0	0%	1	8%	1	5%	3	3%	6	6%
Community Resources	1	3%	0	0%	0	0%	0	0%	1	1%	0	0%
Sub Total	35		22		13		19		89		94	
Total Number of Issues	35		22		13		19		89		94	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Online Services												
Sub Total	14		16		17		12		59		54	
Client Status												
Employee	21	60%	14	64%	8	62%	10	53%	53	60%	65	69%
Claimant	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Dependent	11	31%	7	32%	3	23%	7	37%	28	31%	18	19%
Other	0	0%	0	0%	0	0%	0	0%	0	0%	1	1%
Spouse	2	6%	1	5%	1	8%	1	5%	5	6%	9	10%
Unknown	1	3%	0	0%	1	8%	1	5%	3	3%	0	0%
Sub Total	35		22		13		19		89		94	
Total Product Utilization	49		38		30		31		148		148	

Employee Count												
Total Utilization Rate (% - Annualized)	6.32%		4.90%		3.87%		4.00%		4.77%		4.77%	
<i>Based on Quarterly Average employees</i>	3,100		3,100		3,100		3,100		3,100		3,100	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
FamilySource[®]												
U.S. Services												
Primary Issue Presented												
Child Care-Consultation	1	33%	0	0%	0	0%	0	0%	1	33%	0	0%
Child Care-Infant/Toddler (Centers)	1	33%	0	0%	0	0%	0	0%	1	33%	0	0%
Child Care-Nanny	1	33%	0	0%	0	0%	0	0%	1	33%	0	0%
Elder Care-Consultation	0	0%	0	0%	0	0%	0	0%	0	0%	2	67%
Home Improvement-Carpenter	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Sub Total	3		0		0		0		3		3	
Total Number of Issues												
	3		0		0		0		3		3	
Online Services												
Total Online Services	24	100%	14	100%	26	100%	13	100%	77	100%	43	100%
Sub Total	24		14		26		13		77		43	
Client Status												
Dependent	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Employee	3	100%	0	0%	0	0%	0	0%	3	100%	2	67%
Sub Total	3		0		0		0		3		3	
Total Product Utilization												
	27		14		26		13		80		46	
Employee Count												
Total Utilization Rate (% - Annualized)	3.48%		1.81%		3.35%		1.68%		2.58%		1.48%	
<i>Based on Quarterly Average employees</i>	3,100		3,100		3,100		3,100		3,100		3,100	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
LegalConnect[®]												

U.S. Services

Primary Issue Presented

Child Custody	0	0%	0	0%	0	0%	1	50%	1	8%	0	0%
Civil	0	0%	2	50%	0	0%	0	0%	2	17%	0	0%
Consumer	0	0%	0	0%	0	0%	0	0%	0	0%	1	10%
Credit	1	20%	0	0%	0	0%	0	0%	1	8%	0	0%
Divorce / Separation	1	20%	1	25%	0	0%	0	0%	2	17%	0	0%
Elder Law	1	20%	0	0%	0	0%	0	0%	1	8%	0	0%
Family Law	0	0%	1	25%	1	100%	0	0%	2	17%	3	30%
Landlord/Tenant	1	20%	0	0%	0	0%	0	0%	1	8%	0	0%
Personal Injury	0	0%	0	0%	0	0%	0	0%	0	0%	1	10%
Probate	1	20%	0	0%	0	0%	1	50%	2	17%	1	10%
Real Estate	0	0%	0	0%	0	0%	0	0%	0	0%	2	20%
Visitation	0	0%	0	0%	0	0%	0	0%	0	0%	1	10%
Wills	0	0%	0	0%	0	0%	0	0%	0	0%	1	10%
Sub Total	5		4		1		2		12		10	

Consultation Type

Ask the Expert	0	0%	2	50%	1	100%	0	0%	3	25%	1	10%
Consultation and referral (main source)	2	40%	1	25%	0	0%	1	50%	4	33%	6	60%
Consultation only	3	60%	1	25%	0	0%	1	50%	5	42%	3	30%
Sub Total	5		4		1		2		12		10	

Total Number of Issues	5	4	1	2	12	10
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Online Services

Total Online Services	17	100%	6	100%	12	100%	16	100%	51	100%	90	100%
Sub Total	17		6		12		16		51		90	

Client Status

Dependent	0	0%	0	0%	0	0%	0	0%	0	0%	2	20%
Employee	5	100%	4	100%	1	100%	1	50%	11	92%	8	80%

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Spouse	0	0%	0	0%	0	0%	1	50%	1	8%	0	0%
Sub Total	5		4		1		2		12		10	

Total Product Utilization	22	10	13	18	63	100
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Employee Count

Total Utilization Rate (% - Annualized)	2.84%	1.29%	1.68%	2.32%	2.03%	3.23%
<i>Based on Quarterly Average employees</i>	3,100	3,100	3,100	3,100	3,100	3,100

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
FinancialConnectSM												
U.S. Services												
Primary Issue Presented												
General Financial	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Mortgages, credit card & other debt	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Student Loan Debt	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Sub Total	0		0		0		0		0		3	
Consultation Type												
Consultation and referral (other source)	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%
Consultation only	0	0%	0	0%	0	0%	0	0%	0	0%	2	67%
Sub Total	0		0		0		0		0		3	
Total Number of Issues	0		0		0		0		0		3	
Online Services												
Total Online Services	4	100%	3	100%	9	100%	7	100%	23	100%	8	100%
Sub Total	4		3		9		7		23		8	
Client Status												
Employee	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%
Sub Total	0		0		0		0		0		3	
Total Product Utilization	4		3		9		7		23		11	
Employee Count												
Total Utilization Rate (% - Annualized)	0.52%		0.39%		1.16%		0.90%		0.74%		0.35%	
<i>Based on Quarterly Average employees</i>	3,100		3,100		3,100		3,100		3,100		3,100	

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
GuidanceResources Online [®]												
GRO User Counts												
Registered Users	12		8		10		13		43		54	
Repeat Users	14		12		16		16		50		40	
Unique Users	21		19		20		21		69		73	
Device Usage Counts (Logins & Registrations)												
APP	2	5%	3	10%	9	24%	20	42%	34	22%	17	9%
Desktop Browser	21	49%	18	60%	21	57%	11	23%	71	45%	134	67%
Mobile Browser	20	47%	9	30%	7	19%	17	35%	53	34%	48	24%
Total logins and Registrations	43		30		37		48		158		199	
English USA Usage												
Online Topics												
Financial												
Consumer Issues	2	4%	2	6%	0	0%	0	0%	4	2%	7	4%
Debt & Bankruptcy	2	4%	0	0%	4	7%	2	6%	8	5%	2	1%
Insurance	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Personal Finance	1	2%	0	0%	1	2%	3	9%	5	3%	3	2%
Tax	1	2%	3	10%	0	0%	0	0%	4	2%	0	0%
Home & Auto												
Driver Safety & Education	1	2%	0	0%	0	0%	0	0%	1	1%	4	2%
Legal												
Criminal Law	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Debt & Bankruptcy	0	0%	0	0%	2	4%	0	0%	2	1%	2	1%
Estate Planning & Elder Law	8	17%	1	3%	2	4%	0	0%	11	7%	17	10%
Family Law	0	0%	0	0%	8	14%	0	0%	8	5%	12	7%
Lawyers & Court	0	0%	2	6%	0	0%	0	0%	2	1%	4	2%
Personal Injury & Health Law	2	4%	0	0%	0	0%	0	0%	2	1%	4	2%
Real Estate	0	0%	0	0%	0	0%	3	9%	3	2%	0	0%
Lifestyle												
Planning an Event	0	0%	0	0%	0	0%	2	6%	2	1%	0	0%
Relationships												
Child Care	0	0%	0	0%	6	11%	0	0%	6	4%	2	1%
Divorce & Domestic Issues	0	0%	3	10%	4	7%	4	12%	11	7%	1	1%
Marriage & Relationships	12	26%	1	3%	9	16%	9	26%	31	18%	24	15%
Parenting	1	2%	0	0%	4	7%	0	0%	5	3%	4	2%
Special Needs & Gifted Children	0	0%	0	0%	2	4%	0	0%	2	1%	2	1%

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Wellness												
Addiction	2	4%	0	0%	0	0%	0	0%	2	1%	16	10%
Emotional Well-being	0	0%	7	23%	6	11%	5	15%	18	11%	22	13%
Fitness & Nutrition	0	0%	4	13%	1	2%	0	0%	5	3%	0	0%
Grief & Loss	2	4%	0	0%	0	0%	2	6%	4	2%	6	4%
Personal Growth	4	9%	4	13%	1	2%	2	6%	11	7%	4	2%
Personal Safety	0	0%	1	3%	0	0%	0	0%	1	1%	0	0%
Pregnancy	0	0%	0	0%	0	0%	0	0%	0	0%	2	1%
Stress & Anger Management	0	0%	2	6%	5	9%	2	6%	9	5%	11	7%
Work & Education												
Career Development	0	0%	0	0%	0	0%	0	0%	0	0%	4	2%
In the Workplace	3	6%	0	0%	0	0%	0	0%	3	2%	2	1%
K-12 School	0	0%	0	0%	1	2%	0	0%	1	1%	0	0%
Manager Guidance	0	0%	1	3%	0	0%	0	0%	1	1%	2	1%
Personal Development	6	13%	0	0%	0	0%	0	0%	6	4%	2	1%
	47		31		56		34		168		163	
On-Demand Trainings												
Balancing Work And Life	0	0%	0	0%	0	0%	0	0%	0	0%	6	100%
Coping With a Crisis or Traumatic Event	0	0%	1	100%	0	0%	0	0%	1	20%	0	0%
Difficult Conversations During Times Of Unrest	1	100%	0	0%	0	0%	0	0%	1	20%	0	0%
Natural Consequences, Discipline That Works	0	0%	0	0%	3	100%	0	0%	3	60%	0	0%
	1		1		3		0		5		6	
Online Centers												
Grief and Bereavement	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%
	0		0		0		0		0		1	
Online Searches Topics												
Certified Financial Planner	0	0%	0	0%	2	25%	2	13%	4	9%	1	3%
Child Care Provider	5	45%	11	85%	4	50%	0	0%	20	43%	0	0%
Lawyer	6	55%	2	15%	2	25%	13	87%	23	49%	39	98%
	11		13		8		15		47		40	
Online Asset Type												
Article	35	59%	23	51%	46	69%	21	43%	125	57%	106	50%
Assessment	2	3%	0	0%	1	1%	5	10%	8	4%	11	5%
Merchandise	3	5%	2	4%	0	0%	0	0%	5	2%	7	3%
Multimedia	5	8%	4	9%	5	7%	4	8%	18	8%	14	7%
On-Demand Trainings	1	2%	1	2%	3	4%	0	0%	5	2%	6	3%
Online Centers	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%

	Q1		Q2		Q3		Q4		Year To Date		Last Year	
Resource	2	3%	2	4%	4	6%	4	8%	12	5%	24	11%
Search Database	11	19%	13	29%	8	12%	15	31%	47	21%	40	19%
Survey	0	0%	0	0%	0	0%	0	0%	0	0%	1	0%
Total Activity Types	59		45		67		49		220		210	
Total Product Utilization	59		45		67		49		220		210	