

Starting and Running an EAP 2.0

Presenters

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EAPA 2019 Conference and EXPO





Introductions



Introductions...

- Where are you in the EAP planning process?
- What do you hope to get out of this pre-con?
- Any specific questions you want us to address?



Questions to Consider

- What services are you offering?
- What are your outcomes, measures and tracking systems?
- What are barriers you need to address to grow your program?
- How comfortable are you with tech?



Pre-contemplation

- If you are a licensed clinician – watch the Introduction to Employee Assistance
- Get the CEAP
- Attend EAPA’s annual EAP Conference and EXPO
- Become an EAPA member so you can access: <http://www.eapassn.org>
- JEA Archive – goes back to 2007 – searchable
- Annotated Bibliography of EAP Statistics and Research Articles 2000 – present
- EAP Newsbrief archived issues – back to 2012
- Conference Recordings
- EAP Buyer’s Guide



Define the Scope of Services

Do it right from the start – offer a digital EAP

<https://www.wayforward.io/eaps/>

Document: EAP Contract Scope of services (1)



Staffing - Hiring

If you are hiring: masters level clinicians - psychologists, social workers, RNs.

Have watched the Introduction to Employee Assistance or require it

With CEAP or require it

Search

Member Directory:

<https://www.eapassn.org/Directories/Member-Directory>

CEAP directory: <http://www.eapassn.org/Directories/CEAP-Directory>



Staffing

Building your affiliate provider network:

EAPA member directory

<https://www.eapassn.org/Directories/Member-Directory>

Get copy of license, degrees, liability insurance

Online providers <https://inpathy.com/how-it-works/meet-our-providers/>

Trust Risk Management Services (TRMS)

<https://eapa.trustrms.com/>



Staffing

Account manager

Director of Clinical Services

Sales

EAP consultants both office based and online





Ancillary Services

EAP specific software

Daybreak

<http://www.daybreakeapsoftware.com/eap-software.html>

EAPExpert <http://www.eapexpert.com>

After hours coverage

Protocall <http://protocallservices.com/what-we-do/>

BHR <https://www.bhrworldwide.com/>



Ancillary Services (part 2)

- Childcare/Eldercare
- <http://www.workplaceoptions.com/product-category/dependent-care/>
- Legal
- <http://www.clcincorporated.com/>
- Budget and Credit Counseling
<http://www.consolidatedcredit.org>
- Fitness for Duty
- <http://www.psybar.com/>



Ancillary Services (part 3)

CIR

<https://r3continuum.com/workplace-resilience/>

Workplace Violence Prevention <http://www.taginc.com/>

Sexual Harassment Prevention

Diversity Training

<http://www.operationsinc.com/training-development-services/harassment-diversity-sensitivity-training/>

Change Management



Ancillary Services (part 4)

Wellness

Nutritional counseling

Smoking Cessation

Mindfulness Meditation





EAP Fees and the Budget Worksheet

Fees: PEPM

When to charge a flat fee

When to charge by the case

K-Mart versus Nieman Marcus pricing

EAP Account Budget worksheet (2)



Rolling out the Program Homework

Sample EAP implementation letter (3)

Client Company Profile template (4)

Client Company Health Insurance Profile (5)

Client company implementation checklist (6)

Sample EAP Announcement Memo (7)

Sample personnel handbook policy (8)



Rollout EAP employee orientations - video

Explaining EAP

traditional

https://youtu.be/xgV_MRI8nuQ

newer

<https://youtu.be/bUgBJU1pgpY>



Rolling out the program

Management consultation

<https://www.theeap.com/video-library/esi-employer-video>

CIR

<https://youtu.be/OHyVobUR890>

Aspirational

<https://www.ispot.tv/ad/A4zL/talkspace-talkspace-review-lindsay>

Video – best practices <http://sandwichvideo.com/>



Running the Program

Employee orientation PowerPoint (9)

EAP Manager Training PowerPoint (10)





Running the Program - Clinical

- EAP Statement of Understanding (11)– never see a client until this has been signed
- EAP Consent to release information (12)
- EAP Consent to release information to a supervisor (13)





Running the Program (part 2)

Evidence based assessment tools all public domain validated assessments attached for your use.

- The AUDIT & DUDIT – EAPA endorsed
- [AUDIT Manual](#) (Links in blue)
- [AUDIT Form](#)
- [DUDIT Manual](#)
- [DUDIT FORM](#)
- Brief PHQ - Instruction Manual
- [Brief PHQ \(Links WHO Endorsed for all\)](#)
 - PHQ-9-Depression
 - PHQ-9 Health Questionnaire
 - GAD-7-Anxiety
- Workplace Outcomes Suite
- [WOS CGS Website](#) (Link)
 - Suite-WOS 25 Item
 - WOS Cluster 2
 - WOS 5 item
 - WOS Health Coaching
 - WOS-Satisfaction Survey
- CAGE Questionnaire
- DAST Questionnaire
- EAP Satisfaction Questionnaire
- ORS-Outcomes Rating Scale
- [Outcomes Rating Scale \(ORS\)](#)





Running the EAP (part 3)

- EAP Case Opening template (14)
- EAPA Management Consultation form (15)
- EAP Progress Notes (16)
- EAP Satisfaction Survey (17)
- EAP Staff Manual (18)

<http://eapinabox.com/boxes/9>





Running the EAP – Acct. Mgmt.

- Utilization

<http://www.eapassn.org/Portals/11/Docs/HOME/Utilization.pdf>

- Newsletters/EAP blogs/communications geared towards employees and managers

<http://eapinbox.com/boxes/5>

- Wellness programs

- Quarterly/annual account management report contents



Marketing Packet Components – The Client List

You may want to include a complete or “representative” list of your current client companies as part of your marketing effort. It can be powerful to group your existing clientele by category.

- BANKS AND FINANCIAL INSTITUTIONS
- COLLEGES AND EDUCATIONAL INSTITUTIONS
- CORPORATIONS
- HOSPITALS AND HEALTH CARE ORGANIZATIONS
- SCHOOL DISTRICTS



Marketing Packet Components

EAP Marketing PowerPoint Template (19)

EAP marketing document (20)

EAP ROI “Value of EAP” (21)

Sample EAP brochure (22)

Use of technology



Your EAP Website

- Study the good, the bad, and the ugly
- <http://www.theeap.com>
- <http://www.ccainc.com/home>
- <http://www.e4healthinc.com/>



Preparing for the Sales Call

Sales call questions (23)





Executive Coaching Topics

- Executive coaching for managers, supervisors and new leaders (not therapy)
- DiSC profile questionnaire to assess role behaviors type and style--[DiSC Profile](#)
- 360 Evaluations
- Conflict resolution program
- Communication styles
- Leadership style assessment (Birkman Method)
 - [Birkman Method](#)
- Stay interview



EAP 2.0

- EAPs and EA professionals are threatened by advances in AI, web based platforms, and apps.
- You need to incorporate tech from the inception of your program
- We will review the key disruptive technologies and how to compete with them.



The Threats

- Understand what is already here
- Understand what's coming



The Threats: <https://www.lyrahealth.com> platform

- Connect with local high-quality therapists and digital care apps in just a few clicks.
- Get Care How, When, and Where You Want It
- Choose care that is convenient for you - in-person, live video, or self-guided therapy.
- Effective Care Backed by Research
- Only 20% of therapies are proven to work. Lyra's top providers only use these evidence-based methods.
- No Claims, No Co-Pays
- Your benefit covers the cost of your sessions. No paperwork or insurance hassles.



The Threats:

<https://www.lyrahealth.com/employers/>

- **Lyra replaces hard-to-navigate EAPs** with an innovative approach that engages **10X more employees** and helps them become measurably healthier, happier, and more productive. Lyra makes it easy for employers to support and improve workforce behavioral health and emotional well-being.
- **Lyra replaces your EAP** with a new approach to mental health that is intuitive, intelligent, and effective. From anxiety and depression to stress and relationships, we deliver the right care, right away and help members feel better quickly. **That's why 94% of members love Lyra.**



The Threats: Who is behind Lyra?

David Ebersman - COFOUNDER & CEO

Former CFO of Facebook, Genentech, On board of SurveyMonkey, Castlight

Elaine Yang - VP OPERATIONS

Extensive finance and operations experience,
Led teams at Genentech and Facebook

From 2015-2018, Lyra Health raised a total of \$83.1M in funding over 3 rounds (!).



TalkSpace app

- Flat fee for “unlimited texting” from a clinician
- <https://www.ispot.tv/ad/A4zL/talkspace-talkspace-review-lindsay>



X2AI

- <https://vimeo.com/161880231>



What do these companies do better than EAPs?

- They sound cool, use great marketing and exhibit social media savvy.
- They trumpet evidence based interventions up front and central.
- Promise hi tech anywhere anytime service delivery
- User friendly - offer “fun” visual tracking of progress - typically through apps.



What do EAPs do better than these companies?

- CBT is the new Kool-Aid and pretty much the only approach used.
- Missing: the powerful and valuable EAP assessment that delivers customized counseling and/or referrals to the treatment approach and level of care needed by the employee
- AND an evaluation of the workplace factors and impact relevant to each case.



EAP 2.0 imperative

- Technology seamlessly incorporated into all EAP services. Anytime anywhere and anyhow access. Use text to make appointments, speak with EAP counselor via video. And all of this should be EASY to use.
- As tech progresses, EAP 2.0 is ahead of the curve, incorporating virtual reality, chatbots with machine learning, and anything else that we can't even imagine into the services provided by the EAP.



EAP 2.0 – cont.

- Instead of reinventing the wheel, EAP 2.0 forms partnerships with apps and other tech startups to offer the latest in treatment modalities and delivery systems.
- EAP 2.0 uses the latest in marketing and sales techniques to market themselves to corporations and employees. This should include sophisticated social media campaigns.



EAP 2.0 – final

- EAP 2.0 focuses exclusively on evidenced based service modalities.
- EAP 2.0 partners with the mental health tech sector and VC companies developing tech so we know about the latest and greatest stuff as it is being developed.



Offer video counseling

- Skype is HIPAA compliant and other misconceptions.
- Myths about EAP counseling across state lines.
- There are many platforms – explore
- <https://www.wayforward.io> – focused on Stress, anxiety and depression – uses CBT



Offer video counseling (cont.)

- <https://ginger.io> on demand coaching anytime, anywhere
- <http://insighttelepsychiatry.com> - leading national telepsychiatry service provider organization with a mission to transform access to behavioral health care through innovative applications of technology.
- in the United States physicians are no longer required to see a person in person before seeing them virtually.



Website manner

- Online is different than in person.
- Technology factors need to be mastered
- Behavior: when you're on camera all your actions are magnified. Sitting 6 feet away from your counselor, in person, you might not mind or notice slouching, fidgeting, or gesticulating.
- But a webcam's intimate vantage point augments these actions in ways that patients can find distracting or off-putting. 'And that's just for starters.



Website manner –part 2

- Disable video chat's picture-in-picture feature.
- 'Turn it off and look at the client. Tricky: To appear as though they're making eye contact, clinicians are taught to look not at the patient on their screen, but directly into their device's webcam.

<http://www.iwebu.info/2018/03/web-secret-512-webside-manner.html>



Clinical apps

Since EAP counseling is typically short-term, recommending an app to a client can help fill a waiting period while the practitioner searches for a good referral.

Collaborating with a client on an app can also deepen a relationship that otherwise would be more superficial. For example, reviewing progress on an app with a short-term client may make three counseling sessions seem like more than that.

There are also times when a client may be waiting for a session opening. Apps can also address this gap.

<http://www.eapassn.org/Publications-Resources/Journal-of-Employee-Assistance/Read-a-back-issue/Top-10-Well-Being-Apps-for-2018>



Your App Competition

Lantern <https://golantern.com/>

Instead of therapy, “coaching.” Users share problems via text and receive highly structured strategies for feeling better in that moment, such as guided meditation or breathing exercises. Starting at \$49 a month. In 2016, Lantern raised \$17 million for its mobile-based mental health coaching program.

T2 Mood Tracker <http://t2health.dcoe.mil/apps/t2-mood-tracker>

Free app enables its users to track their own mental health, helping them to identify patterns and triggers by which they might gain greater insight and control over changes in mood.

Talkspace



Incorporating apps (cont.)

PsyberGuide is a non-profit website dedicated to helping those seeking to make responsible and informed decisions about computer and device-assisted therapies for mental illnesses. <https://psyberguide.org/apps/>

If you go to their "Product Listing," you will note that each app is listed along with a PsyberGuide rating that corresponds to the amount of research and support backing the product. In addition, there is an App Quality Score on a scale of 1 to 5. Finally, there is a link to an expert review - if one exists.

<http://www.iwebu.info/2017/08/web-secret-479-psyberguide.html>



EAP Apps

- Can be expensive if app is complex
- Can be done for free if basic
 - <http://www.appmakr.com>
- ESI
 - <https://itunes.apple.com/us/app/esi-employee-assistance-program/id949847392?mt=8>
- Morneau Shepell
 - <https://itunes.apple.com/us/app/my-eap/id436292883?mt=8>



AI, VR, and Avatars

Digital eldercare service <https://www.care.coach> .
For about \$200 a month, a human-powered avatar watches over a homebound person 24 hours a day. <https://www.wired.com/story/digital-puppy-seniors-nursing-homes/>

The cutting-edge, fully immersive, sexual harassment training program experienced in Virtual Reality.

<https://www.tryvantagepoint.com/>



WOS – Workplace Outcomes Suite

- EAPA endorsed <http://www.eapassn.org/WOS>
- demonstrates effectiveness of EAPs in quantifiable business terms.
- 2018 - 24,000+ cases compiled from 30+ different EAPs across 28 countries demonstrated 16% improvement across 5 outcomes: absenteeism, presenteeism, work engagement, workplace distress, and life satisfaction.
- Consists of only 5 questions pre and post EAP.



Marketing EAP must Include Selling the Latest Delivery Systems

Texting

At minimum use texting to make EAP appointments

- Must use an encrypted texting platform WhatsApp
 - <https://www.whatsapp.com/>

Be aware/learn from highly funded texting apps that compete with the traditional EAP model

- Talkspace for Business is invading the world of corporate mental health and EAP.
 - <https://www.talkspace.com/online-therapy/therapy-for-business/>
- 7cups.com
 - <https://www.7cups.com/>



Sell the latest Delivery Systems

Video counseling

SkyTherapist.com –a platform that enables clients to interact with a therapist through a secure interface. Aims to source clinicians to USA, and entire world.

- <http://skytherapist.com/>

Be aware/learn from highly funded video therapy apps and websites

- <https://ginger.io> Ginger io for Employers
- <https://www.betterhelp.com/>



Implications

Texting and video across state lines

Impact on affiliate provider list – must contract with tech sophisticated providers

May need to train staff and affiliates without the skills

Ethical Framework for the Use of Technology in EAPs

- <http://www.eapassn.org/TechinEAPs>

Online Therapy Institute

- <http://onlinetherapyinstitute.com/>



Video EAP Counseling

- Setup, informed consents, backup plans, time zone considerations, online etiquette
- Zoom.us
 - <https://zoom.us/j/6306092296>
- Vsee.com
 - <https://my.vsee.com/download>
- Appear.in
 - <https://appear.in/klaybor>



Why Participate in Social Media?

...showcase yourself as an expert. Or acquire expertise. Multiple levels of engagement.

- Easiest: read blogs and follow people
- Next easiest: read blogs, follow people and comment, recommend apps

If you are willing to do some work do it!

- Tweet/Instagram/LinkedIn
- Most work but most powerful: blog



How Many Channels Should You Use?

- Starbucks employs 6 full time people to manage 11 channels
- Most can only handle two and do a great job
- Each channel has its own “culture,” but each culture is not right for each and every person.

You Only Need 150.....

...friends, followers, connections, etc.

- [Robin Dunbar](#) - there is a cognitive limit to the number of people with whom one can maintain stable social relationships. **150** is [Dunbar's Number](#).
- Average Facebook user has 130 friends.
- Average Twitter user has 126 followers.
- Average LinkedIn users has around 60 connections.



Blogging—the Queen of Social Media

EAP blogs – a wide open space

- <http://www.compeap.com/blogs>
- <http://blog.workhealthlife.com/>

Mental health – many – but quality hard to find

- <http://www.whatsyourgrief.com/>
- <http://www.wheretheclientis.com/>



Blogger

- Allows you to write and schedule your blog posts in advance
 - <http://www.blogger.com/>

Usual

Usual long



Other Channels

- LinkedIn

- <http://www.linkedin.com/groups?mostPopular=&gid=94553>

- Twitter

- Instagram

- Facebook



My Social Media Routine

- **HINT:** you need one too
- Generally, routines rely on a degree of automation
- Automation prevents insanity



Follow

Look at LinkedIn once a day (5 days a week)

4 blogs

- <https://whatsyourgrief.com/>
- <http://waitbutwhy.com>
- <http://www.refinery29.com>
- <https://www.brainpickings.org/>

Facebook – once a day (7 days a week)

Twitter once a week on Hootsuite



The Biggest Challenge—Content

- <http://www.stumbleupon.com>
- <http://www.ted.com>
- <http://www.google.com/alerts>
- guests

Emphasisweb

Usual short



Twitter

Hootsuite write postings months in advance and schedule them for publication at a later date. Can be used for Twitter, Facebook, LinkedIn, etc.

- <https://hootsuite.com/login>

Prune once a month

- <https://managefitter.com/unfollow>

Usual

usual long



It May Pay to Hire an Expert

Upwork

- <https://www.upwork.com/>

Fiverr

- <https://www.fiverr.com/>



Best Practices

- **It's a challenge being a counselor in a wired world.** Clients are increasingly involved with social networks. They will Google their therapists and therapists can be tempted to do the same.
- **Most people don't think twice about disclosing their personal information online.**



Best Practices (cont.)

- Self-disclosure online is almost inevitable.
- Often it is initiated by clients who want to learn more about their counselors.
- Some clients may do more than a Google search: they may join social networking sites, join professional listservs/chat rooms, or pay for online background checks or online firms to conduct illegal, invasive searches.



Best Practices (cont.)

- Create and maintain a formal social networking site policy as part of the informed consent process.
- Informed consent processes should at the very least acknowledge the risks and benefits of using social media and other technology.
- Policies should lay out expectations for using such sites, namely that counselors do not "friend" or interact with clients on social networking sites.



Best Practices (cont.)

- Counselors should develop online **technological competence** - understand the nature and requisite technology of social networking sites.
- They should proactively set controls that limit who sees their personal information.



Best Practices (cont.)

- Clinicians should find out whether their professional and personal liability insurance covers social networking sites.
- Counselors should avoid think about the potential impact of their posts, even if they use high privacy restrictions and other protections, such as pseudonyms.



Best Practices (cont.)

Facebook, fully public post and comments (*all names and identifying information have been changed*):

- **The post** - Abby writes: *"Hi Bob, do you accept Aetna insurance?"* (Note: Abby's full name and photo are posted.)
- **First comment, posted by Bob the counselor:** *"Hi Abby. Can you send me a copy of your insurance card? What about using your EAP benefit? I'm affiliated with a number of Employee Assistance Programs. I would be happy to work with you."*

<http://www.iwebu.info/2015/03/web-secret-354-clueless-about.html>



Best Practices (cont.)

2nd comment, a response from Abby:

- *"The Acme Widget Company has an EAP. I have a counselor assigned to me. He wants me to see you due to our previous work together. He says I need more help with my issues than can be offered through the EAP. Do you know Dr. Phil in Oak Grove, IL? He is my new psychiatrist."*



Best Practices (cont.)

- **Cybersecurity.** Every company is a "tech company" because we all use technology to operate.
- The necessary corollary to this fact: We are all vulnerable to cyberdisruption, whether from hackers or our own or others' incompetence.
- Every enterprise will need cyberprotection in ways that haven't historically been necessary.

[Iwebu cybersecurity posts](#)



Online Therapy Institutes Ethical Frameworks

- Ethical Framework for the Use of Technology in Mental Health
- Ethical Framework for the Use of Technology for Career and School Guidance
- Ethical Framework for the Use of Technology in Disaster Mental Health
- Ethical Framework for the Use of Social Media by Mental Health Professionals
- Ethical Framework for the Use of Technology in Coaching
- Ethical Framework for the Use of Technology in EAPs
- Ethical Framework for the Use of Technology in Supervision

<http://onlinetherapyinstitute.com/ethical-framework/>



EAP 2.0 opportunity number one

- 2017: FDA grants 23andMe authorization to offer ten genetic health risk reports including late-onset Alzheimer's disease, Parkinson's disease, celiac disease, and a condition associated with harmful blood clots."
- 23andMe does not offer services to help users consider the impact of this info
- 2018: Iceland eliminates Down Syndrome.
- Huge opportunity for EAPs to provide supportive genetic counseling services. Who will be first?



EAP 2.0 opportunity number two

- Silicon Valley is struggling to limit the screen time of its children: "the benefits of screens as a learning tool are overblown, and the risks for addiction and stunting development seem high."
- "...no phones until the summer before high school, no screens in bedrooms, network-level content blocking, no social media until age 13, no iPads at all and screen time schedules enforced by Google Wifi that he controls from his phone. Bad behavior? The child goes offline for 24 hours."
- Reality: opinions about best practices vary. And friends may have the banned tech.



EAP 2.0 opportunity number two

- There is a dearth of research on the subject, in part due to the lightning speed with which technology evolves. As soon as we establish best practices, we are faced with a new evolution. Watch out when virtual reality is perfected and we can disappear into worlds that have no reality.
- EAPs have the opportunity to develop presentations about how to limit screen time.
- Individual counselors can develop this expertise to help their clients of all ages.



Learn More

- <http://www.eapassn.org/i4a/pages/index.cfm?pageid=901>
- my blog about tech for EA and mental health professionals
 - <http://iwebu.info>
- 12 Social Media Facts and Statistics You Should Know in 2016
 - <http://www.makeuseof.com/tag/12-social-media-facts-statistics-know-2016>
- Dunbar's Number
 - <http://www.iwebu.info/2011/02/web-secret-141-dunbars-number.html>
- EAP blogs
 - <http://www.compeap.com/blogs>
 - <http://blog.workhealthlife.com/>
- Mental health blogs
 - <http://www.whatsyourgrief.com/>
 - <http://www.wheretheclientis.com/>
 - <http://www.blogger.com/>
- EAPA LinkedIn group
 - <http://www.linkedin.com/groups?mostPopular=&gid=94553>
- Talkspace
 - https://www.youtube.com/watch?v=J_wy9tgxLP8



Learn More (part 2)

- Sandwich Video <http://sandwichvideo.com>
- What's Your Grief <http://www.whatsyourgrief.com/>
- Where the Client Is <http://www.wheretheclientis.com/>
- Wait But Why <http://waitbutwhy.com>
- Refinery 29 <http://www.refinery29.com>
- Brain Pickings <https://www.brainpickings.org/>
- <http://www.stumbleupon.com>
- <http://www.ted.com>
- <http://www.google.com/alerts>
- <https://hootsuite.com/login>
- <https://managefitter.com/unfollow>
- Make an app <http://www.appmakr.com>



Learn More (part 3)

- Ethical Frameworks

- <http://onlinetherapyinstitute.com/ethical-framework/>

- Hire my daughter

- <http://www.iwebu.info/2015/01/web-secret-344-why-you-should-hire-my.html>

- On the Internet nobody knows you are a dog

- <http://www.iwebu.info/2012/02/web-secret195-nobody-knows-youre-dog.html>
 - <http://www.slideshare.net/wollberg5/wisconsin-social-media>



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Learn More

- Tech Trends – a quarterly column in the Journal of Employee Assistance since the 2nd quarter 2010 issue <http://www.eapassn.org/i4a/pages/index.cfm?pageid=901> (EAPA members only)
- Marina London's blog about tech for EA and mental health professionals <http://iwebu.info>
- EAPA LinkedIn group <http://www.linkedin.com/groups?mostPopular=&gid=94553>
- EAP Newsbrief. Free weekly electronic newsletter -subscribe here <http://www.eapassn.org/>
- Journal of Employee Assistance archive. Quarterly publication. <http://www.eapassn.org/JEAArch> (EAPA members only)
- **Annotated Bibliography of EAP Statistics and Research Articles 2000 - present** features articles are from a broad range of journals and other print media, listed in reverse chronological order, and alphabetized by author within each year. <http://www.eapassn.org/EAPresearch> (EAPA members only)
- Workplace Outcomes Suite. Demonstrates the effectiveness of EAPs in quantifiable business terms. <http://www.eapassn.org/WOS>
- EAPA Conference on Demand <http://eapa.sclivelearningcenter.com/index.aspx?PID=8163>
- Future EAP Conferences
- EAP in a Box <https://eapinabox.com/>



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