

ITA Group

LifeWorks EAP Program Summary Plan Description

LifeWorks by Morneau Shepell



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Confidential and proprietary



To Whom It May Concern:

LifeWorks by Morneau Shepell is a leading Employee Assistance Program provider and a global pioneer in the well-being industry supporting over 37 million covered lives worldwide. Our services help manage the health, wellbeing, and productivity of your employees – today and in the future. The following are three key elements that highlight our ability to partner with you to provide comprehensive EAP services to support your employees and their family members:

Leading account management support

At LifeWorks by Morneau Shepell, one of our key service differentiators is an unparalleled emphasis on high quality care for our customers. In cultivating successful relationships, we take the same approach to care as we do for our individual clients. Our Account Management team will ensure that program implementation is tailored to meet your specific needs and to build trust and confidence in the quality of our program.

EAP awareness and access

In this modern, often digital, age, it is critical to provide individuals with the care and support they need, when and how they need it. We offer multiple access points (telephonic, text, chat, mobile app and web-video) for employees and family members to reach out for the support they need in a way that is convenient and comfortable.

Clinical case management

Our clinical services are designed to help support your organization, employees, and their families. Our clinical delivery model allows us to thoroughly assess the needs of every EAP client. Our philosophy differs from a traditional call center. Rather than simply providing a referral for in-person sessions, work life services or to a specialty resource, we provide caring, clinical support with a commitment that our clinicians follow each case from beginning to end.

Please consider the following summary of services as our commitment to a continued partnership that will exemplify best in class service for ITA Group.

Sincerely,

Jen Clatfelter



Investment Summary

The following EAP services will be available to ITA Group employees and household family members:

Core services included in the EAP

Access to best-in-class and specialist counseling-Give your employees an unlimited, and immediate access to specialized professionals in counseling, social work, human services and psychology. Our EAP counselors are available 24/7/352 for telephone assessment utilizing evidence-based evaluation tools, referral, and crisis intervention services.

Multiple counseling modalities-You can immediately access an EAP counselor via phone, live chat, and email. Confidential and secure counseling sessions with members of our professional network include:

- Toll-free number
- Video
- Live chat
- Tele-counseling

Clinical services-Up to five (5) short-term, problem resolution sessions per presenting problem, per year.

Comprehensive support for Work and Life issues-Everyday concerns can have a significant impact on the physical and emotional health of an individual's productivity at the workplace.

- **Legal** – a 30-minute consultation per issue by phone or in an attorney's local office. One consultation per issue is available each year. Additional services are available at 25% discount of the attorney's hourly fee.
- **Financial** – phone access to financial counselors to answer questions or schedule a 30-minute counseling session per issue for bankruptcy, establishing savings goals, and finding resources for home ownership, college funding, or retirement planning.
- **Child care** – assistance with locating child care, parenting, adoption, and education resources.
- **Elder care** – guidance on locating elder care resources ranging from skilled nursing facilities to local programs.
- **Identity theft** – Fraud resolution specialists provide guidance and coaching to help with emergency response activities following an identity theft occurrence.
- And many more, including: **nutritional & weight management, parenting, midlife & retirement, career, and everyday issues.**

Employer Support-Management Support – Support for employees (suicide & depression concerns, aggression/bullying, sexual harassment, substance abuse issues and policy development), Employee Referrals, Manager Consultation (employee performance & wellness issues), Mandatory/ Monitored Referrals, Manager Personal Growth (manager training, stress



Core services included in the EAP

management, succeeding as a manager, workload, managing absence, appraisals), changes in the workplace and workplace policy issues to support safety.

Critical Incident Response –Telephonic and on-site support for critical incidents that impact the workforce (workplace violence, natural disasters, accidents, terrorist events, employee deaths, and more).

LifeWorks by Morneau Shepell Workplace Learning Solutions-Education and wellness seminars, skill building workshops, and eLearning from our extensive catalogue of topics to be delivered onsite and in multiple formats/modalities by industry subject matter experts.

Well-being News Feed -The **LifeWorks Well-being News Feed** (‘News Feed’) creates a social platform in which all participants can interact with personalized well-being content and engage with their company culture. The News Feed is accessed through the LifeWorks app on participants’ smartphones or computers through each employee’s personal account and serves as the delivery mechanism for all well-being activity. Automated reminders encourage employees and end users to create personal accounts on the platform, driving participation with the app. As a participant signs up, they are guided through a process to personalize the information they see in the News Feed based on their preferences.

The News Feed builds a well-being culture across the company and creates a sense of connection among employees. It also promotes high participation among users because it gives them so many reasons to come back into the app on an ongoing basis, including:

- Interaction with daily, snackable well-being content personalized to their own preferences;
- Updates on benefits news;
- CEO motivational messages; and
- Business milestones.

Company Posts – Companies can create posts for the News Feed including congratulatory posts, company-wide announcements, initiatives, CEO messages, press releases, learning, benefits announcement, etc.

Featured Perks – A company administrator can promote and suggest perks.

Personalized snackable well-being articles – Snackable Well-being is the first step on your wellness journey. You select the areas of your life you’re most interested in improving: Body, Mind, Personal Finances, Relationships and Work. Every day, you’ll be delivered short, ‘snackable’ pieces of content from leading experts like Emma Sepela, Caroline Webb, and more. By spending just a few minutes a day with these articles, you’ll learn how you can improve your life both in and out of work. When you’re ready to move on to a new topic, a new series will be served to you based on your preferred topics, making Snackable Well-being a personalized experience unique to you.



Core services included in the EAP

Company Directory - An easy-to-use directory providing access to employee profiles, including roles and contact details, with the ability to text, email or call directly.

Financial Well-being: Feel Rewarded (Perks & Savings)

Participants' financial well-being is supported through access to a financial health assessment, extensive online resources that address all areas of financial management, and highly qualified experts who are able to provide financial consultations telephonically*. As part of our financial well-being solution, employees will have access to the LifeWorks Perks and Savings solution that addresses everyday practical financial well-being. This feature improves participants' financial well-being by allowing them not only to save on everyday purchases, but also important life events. Accessed right from within the LifeWorks app, employees will have savings power in their pocket, around the clock and in one location. This unique approach to perks, all integrated on the same total well-being app enables participants to easily and conveniently stretch their hard-earned pounds with a benefit that is always appreciated in the field.

Digital Gift Card Discounts - Up to 15% at 130+ brands incl. Nike, Best Buy, Gap, Target, AMC Theatres and many more.

Online cashback at over 730+ brands - Paid directly into your wallet.

LIFT session - Automated fitness journeys and chat access to coaches. Built by industry experts to help participants achieve your fitness goals. An automated journey is a six-week program with three 30 minute automated sessions per week. Participants can chat live with certified coaches to receive customized fitness recommendations, personalized guidance and monitoring. Coaches can answer questions about fitness, nutrition, sleep, and how to use the app/platform. Add-on fitness services including corporate challenges and group training are available.

Strategic account management-We provide support and unlimited access to a team of experts in the areas of clinical services, customer service, and thought leadership. Each customer has a designated customer success manager and supporting team of clinical and administrative professionals who will be responsible for the overall contract, administration, strategy, reporting and analysis.

Full implementation including all stakeholder, people leader and employee EAP Training/Orientation Sessions. The implementation is professionally project managed by a dedicated implementation and project management team.

Program promotion and communications-Throughout the life of your program, we provide proactive communication materials and messaging in addition to the regular communications from your account management team to strengthen EAP utilization and engagement.

- Electronic newsletters to employees and supervisors
- Subscription text campaigns
- Live webinars (two per month)
- Email communications



Core services included in the EAP

Reporting and Insights-We understand that not every client will require the same type of utilization data, and our systems and tools are flexible to allow us to incorporate any data elements that you may wish to see (within the limits of client confidentiality). Our reports also focus on key outcomes of our counseling services that impact absenteeism, productivity and overall physical/mental health. This data provides a strong foundation for analysis, recommendations and determining a broader health and wellness strategy.

Management consultation and referrals-The EAP is a resource for managers and supervisors requiring assistance with an employee performance issue. For example, if an employee's behavior appears unsafe or his/her judgement, coordination, physical or mental ability appears to be unsound or inconsistent with operating procedures. An EAP clinician will open a management referral case, assist with resolving the issue, and track the employee's progress until resolution.

Connecting employees to benefits beyond EAP-As part of our service delivery and during the implementation phase, we work closely with you and your local benefit providers to introduce our program and agree to protocols for transferring and connecting employees to other services that your benefit providers offer. This information is incorporated into our case management system and can also be made available through a dedicated area on our website.

Number of employees	500
Per Employee Per Month	\$.95
Per Employee Per Year	\$11.40

