Definitions for External Service Provider (ESP) Statistics 2021-2022

These definitions can also be found in the 'cell comments' attached to the corresponding cell on the External Service Provider Statistics Excel Sheet (as indicated by red corner markers in the top right corner of the cell). To view the comment, place the cursor over the cell.

Excel Spread sheets can be enlarged to facilitate viewing. On the main toolbar, at the top of the screen, select "view", select "zoom" and then select the desired level magnification and then "ok". Should you want to increase the magnification more than 200% select "custom" and type the desired level of magnification (e.g. 300 %).

Excel spreadsheets only tabulate numerical data. Non-numerical data such as text is not a valid entry and prevents the spreadsheet from calculating data accurately. Please enter all non-numerical data in the indicated sections **only**.

Note: All statistical information is to be tabulated on a monthly basis. Please make sure to enter client information in the month that they were seen, to ensure accuracy of the information.

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TAB 1: COUNSELLING FOR EMPLOYEES ONLY

GENERAL INQUIRIES

Use this section to track the number of people who contacted you for general **information only.** Examples of general inquiries include information on: the program (e.g. number of sessions available, qualifications of the counsellors, eligibility criteria, etc.), accessing services, available community resources, available learning solutions such as seminars/webinars, etc.

NEW CASES*

Use this section to track the number of people who consulted you for counselling, under the headings 'female', 'male' or, 'other'.

The following are **not** to be considered cases, and will be tracked separately:

a. Clients who call for information or call requiring referral services only;
b. Advisory services provided to managers, supervisors, union representatives and human resources professionals;
c. Specialized consultations (financial and legal); and,
d. Clients who initiate counselling services but do not attend their scheduled session, regardless of modality.

Cases are counted as "new cases" only once per fiscal year (April 1st to March 31st), regardless of how often the client is seen for an issue. However, if the same client contacts the EAP later in the same fiscal year about an issue unrelated to the issue discussed the first time, the client is considered a new case.

***Each new case should only show up once in one of the following categories, and be tracked based on the client's gender (Female, Male, Other (e.g. Non-binary, gender unknown)):**

Employees (Alone):
Use this section to track the number of CRA employees who accessed the EAP on an individual basis for counselling, under the headings 'Female', 'Male', or 'Other'.

Employees & Family Member(s):
Use this section to track the number of CRA employees who accessed the EAP with a family member for couples or family services. Even though there is more than one individual present, **only one person (the employee) should be listed** on the statistical form, under their corresponding gender.

Crisis Counselling:
Use this section to track the number of employees or family members who called via the Contractor's toll free telephone number during a crisis situation. This includes cases that need to be addressed immediately or within the same day. This number will automatically be added to the **Total New Cases** line and should not be counted in the preceding categories.

TOTAL NEW CASES
The total number of new cases includes the number of 'Employees (alone)', 'Employees and family member(s)' and the number of 'Crisis Counselling' cases. This row will automatically calculate the total number of new cases.

MODE OF DELIVERY
Use this section to track the mode of delivery used to provide counselling services for all new cases. The total number of this section should be the same as the **Total New Cases** line.

Face-to-face:
Use this section to track the number of clients who attended counselling sessions in-person, under the headings 'Female', 'Male', or 'Other'.

Telephone:
Use this section to track the number of clients who attended counselling sessions by telephone, under the headings 'Female', 'Male', or 'Other'.

Online:
Use this section to track the number of clients who attended counselling sessions using various Internet-assisted modalities such as chat/text, email or video conference, under the headings 'Female', 'Male', or 'Other'.

i) **Email:** non-synchronous, communication between a client and professional counsellor via secure e-mail.

ii) **Chat:** synchronous communication between a client and professional counsellor via text.

iii) **Video Conference:** synchronous communication between a client and professional counsellor using devices with a built-in camera (laptop, tablet or smartphone) or a computer and webcam, and encrypted custom Internet software enabling both parties to see and hear each other.

CARRIED OVER CASES

Use this section to track the number of cases that were counted as a new case in a previous month and that are carried over to the current month.

TOTAL OPEN CASES

The total number of open cases includes the number of new cases and carried over cases for a given month. This row will automatically calculate the total number of open cases.

TOTAL CLOSED CASES

Indicate the total number of cases that were closed during each month.

AGE GROUP

Use this section to track the age group for every new case. If there is more than one individual present, the counsellor determines the primary client and selects their corresponding age group.

COUNSELLING

Use this section to capture statistical data on all open counselling cases.

Number of Sessions:

List the total number of sessions held with employees, and with employees and family members consulting together, in the current month.

Number of Session Hours:

Indicate the total number of hours spent providing counselling services. Increments of 0.25 hours (15 minutes) can be used to tabulate the time spent providing counselling. The number of session hours must be listed in the month in which they occurred.

Number of 'No-shows':

Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

Number of Cancellations:

Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

REFERRAL SOURCE

Use this section to list the main referral source from which the first counselling visit originated, for each new case. The 'Total' line of this section should match the **Total New Cases** line.

Colleague

Anyone who works with the client.

Coordinator-counsellor

CRA employees who are qualified mental health professionals designated to coordinate, deliver, manage and monitor EAP services in their assigned area or region.

Family doctor or external health service
General practitioners, specialists, walk-in clinic physicians, hospital intake workers, nurses or physicians, etc.

Human Resources Personnel
Employees from CRA HR Programs, such as Informal Conflict Resolution Practitioners, Occupational Health and Safety Coordinators, Early Intervention and Return to Work Coordinators, etc.

Self
When the client has self-referred, specify the source of the EAP contact information.

- **CRA InfoZone (Intranet) / external webpage**
  InfoZone is the CRA's Intranet platform that is only available to CRA employees. CRA EAP information is also posted on the public Canada.ca website.

- **CRA newsletter**
  CRA developed newsletter that included EAP information or the Contractor's EAP newsletter distributed internally.

- **EAP learning session / orientation**
  EAP information session, lunch and learn, workshop, orientation session or awareness video.

- **EAP poster / promo material**
  EAP poster, flyer, pamphlet, fridge magnet, etc.

- **Office-wide email**
  CRA messaging with EAP information or EAP issued messaging.

- **Orientation to the CRA**
  Self-directed or facilitator-led overview of the CRA mandate, programs and services, for new CRA employees. Content also touches on employee benefits, including the EAP.

- **Social Media**
  Includes Tweets from CRA senior management, recruitment campaigns on Facebook and Instagram, videos posted internally or on YouTube, and other media that touch on the EAP in general, etc.

- **Other**
  Indicate the source in the Comments section (e.g. was a previous client).

Supervisor or Manager
Includes the employee's direct team leader, supervisor or manager, and other members of the management team.

Union representative
Union representatives, union stewards, union newsletter, etc.

Unknown
Use this category if the client does not remember or prefers not to share the source of the referral.

Other
Specify the referral source in the Comments section.

Total
This line will automatically calculate the number of clients, by gender, for each referral source. The total number should match the **Total New Cases** line.

ISSUES
List the counselling issue(s) under the appropriate heading(s). If more than one issue is identified (e.g. alcohol and legal), **list all main issues**. Many times the issue(s) reported by the client at Intake (i.e. primary presenting issue) is not the primary issue as determined by the professional counsellor (i.e. primary assessed issue). Only the assessed issues should be tracked.

Addiction – Substance (self):
Client requests services for their own substance use or addiction (e.g. drug, alcohol, or other substance(s)).

Addiction – Substance (others):
Client requests services regarding the substance use or addiction (e.g. drug, alcohol or other substance(s)) of another person (e.g. family member, friend).

Addiction – Gambling (self):
Client requests services due to their own gambling behaviour or addiction (e.g. slot machines, poker, online gambling, etc.).

Addiction – Gambling (others):
Client requests services regarding the gambling behaviour or addiction (e.g. slot machines, poker, online gambling, etc.) of another person (e.g. family member, friend).

Addiction – Other:
Client requests services for other types of behavioural addiction (e.g. compulsive shopping, internet/video game addiction, sex addiction, etc.) for themselves or related to another person (e.g. family member, friend).

Family – Relationships:
Client requests services for relationship issues within their immediate or extended family (e.g. conflict between siblings).

Family – Children:
Client requests services for issues regarding their children (including foster children), step children, or children within their extended family. Includes parenting issues and concerns for the safety and well-being of a child.

Family – Couple:
Client requests services for relationship concerns with their spouse or partner (e.g. intimacy issues, conflict, communication, separation/divorce, etc.).

Family – Elder:
Client requests services regarding an aging family member, such as their parent, in-laws, or a member of their extended family.

Family – Violence:
Client requests services due to threatening, abusive or violent behaviour occurring in their home, including between teenage or adult children and other family members (i.e. sibling(s), parent(s)), and intimate partner violence. Clients may be the victim, perpetrator, or witness.

Family – Other:
Other family related issues for which the client is seeking counselling services. Specify the type of family issue in the Comments section.

Financial (stress):
Client requests services due to stress related to a financial matter.

Grief:
Client requests services related to grief and bereavement issues. Excludes suicide grief.

Health – Emotional/Mental (self):
Client requests services regarding their own emotional or psychological well-being (e.g. anger management, self-esteem issues, mental illness).

Health – Emotional/Mental (others):
Client requests services regarding someone else's emotional or psychological well-being (e.g. anger management, self-esteem issues, mental illness).

Health – Physical:
Client requests services regarding their physical well-being (e.g. health habits, lifestyle) and/or concerns (e.g. health condition/symptoms).

Legal (stress):
Client requests services due to stress related to a legal matter.

Relationships - Other:
Client requests services regarding relationships, other than with their immediate or extended family members and their work community. Examples include relationships with friends, neighbours, community or social group, etc.

Suicide - Own thoughts:
Client requests services regarding their own suicidal thoughts or behaviours.

Suicide - Other person:
Client requests services regarding concerns for someone else's (colleague, family member, friend, etc.) suicidal thoughts or behaviours.

Suicide - Grief:
Client requests services for grief and bereavement issues related to a death by suicide.

Work - Abuse, Threats, Stalking and Assaults against Employees:
Client requests services due to abuse, threats, stalking or assault directed at them or their property in the performance of their work duties, or as a direct result of their duties.

Work – Career:
Client requests services regarding career related issues, changes or decisions.

Work – Change:
Client requests services regarding a work-related transition (e.g. new process/procedure, new manager) or workplace change (e.g. office move or refit (Workplace 2.0)).

Work – Conflict (Peer):
Client requests services regarding a conflict with **a colleague**.

Work – Conflict (Supervisor):
Client requests services regarding a conflict with their immediate **supervisor or another superior**.

Work - Discrimination:
Client requests services related to discrimination in the workplace. Clients may be the subject of discrimination, the perpetrator or the witness.

Work - Handling of a Suicide Threat:
Client requests services regarding their experience in handling a suicide threat at work.

Work - Harassment:
Client requests services related to harassment in the workplace. Clients may be the subject of harassment, the perpetrator or the witness.

Work - Performance:
Client requests services regarding performance related issues (e.g. personal or work-related issue affecting their ability to meet performance targets/expectations, difficult performance evaluation, etc.).

Work - Retirement:
Client requests services in preparation for retirement.

Work – Return to Work:
Client requests services regarding return to work issues (e.g. apprehension/fear of returning after a long absence, challenges with their support plan or accommodation measures, etc.)

Work – Stress:
Client requests services regarding work related stress.

Work – Workforce Adjustment:
Client requests services regarding the impact of a workforce adjustment situation (e.g. downsizing or restructuring) on their personal and/or professional life.

Work – Workload:
Client requests services regarding workload issues (e.g. volume - too heavy/light, pace –too fast/slow, unreasonable deadlines, perceived workload inequities within team, etc.).

Work – Other:
All other work-related issues for which the employee is seeking counselling services. Specify the work-related issue in the Comments section.

Work-Life Balance:
Client requests services related to work-life balance (e.g. competing priorities between the responsibilities and pressures of work and those in other areas of the client's life, such as family, friends and interests).

Trauma:
Client requests services regarding an emotional shock following a stressful event.

Other:
List all other issues for which the employee or family member is seeking counselling services.

REFERRED TO
Indicate the number of clients under their corresponding gender, referred to each of the resources. 'Referred' can include providing the client with the resource's contact details, or calling the resource on their behalf if they are unable to make the initial step, etc. Include the resource(s) whether the client follows through with the referral.

Community Services – Long Term Therapy:
Includes referrals to longer term or specialized counselling or treatment, such as psychologists or addiction treatment services. Specify the type of community service in the Comments section.

Community Services – Other:
Includes referrals to medical practitioners, urgent care/walk-in clinics, support groups, etc. Specify the type of community service in the Comments section.

Coordinator-counsellor:
CRA employees who are qualified mental health professionals designated to coordinate, deliver, manage and monitor EAP services in their assigned area or region.

Human Resources:
Refers to CRA HR Programs, such as the Informal Conflict Resolution Program, Occupational Health and Safety, the Early Intervention and Return to Work Centre, etc.

Management:
Refers to the employee's direct team leader, supervisor or manager, or to another member of the management team.

Union:
This section refers to the employee's designated union organization and/or union representative.

Other:
List all other resources that you have suggested to the client, in the Comments box.

TAB 2: COUNSELLING FOR FAMILY MEMBERS

GENERAL INQUIRIES
Use this section to track the number of people who contacted you for general **information only.** Examples of general inquiries include information on: the program (e.g. number of sessions available, qualifications of the counsellors, eligibility criteria, etc.), accessing services, available community resources, available learning solutions such as seminars/webinars, etc.

NEW CASES*
Use this section to track the number of people who consulted you for counselling, under the headings 'female', 'male' or, 'other'.

The following are **not** to be considered cases, and will be tracked separately:

a. Clients who call for information or call requiring referral services only;
b. Advisory services provided to managers, supervisors, union representatives and human resources professionals;
c. Specialized consultations (financial and legal); and,
d. Clients who initiate counselling services but do not attend their scheduled session, regardless of modality.

Cases are counted as "new cases" only once per fiscal year (April 1st to March 31st), regardless of how often the client is seen for an issue. However, if the same client contacts the EAP later in the same fiscal year about an issue unrelated to the issue discussed the first time, the client is considered a new case.

***Each new case should only show up once in one of the following categories, and be tracked based on the client's gender (Female, Male, Other (e.g. Non-binary, gender unknown)):**

Family Member(s) (Without Employee):
Use this section to track the number of eligible family members who accessed the EAP on an individual basis or as a family, when the CRA employee was not present (for example the employee's spouse and their child). Even though there may be more than one individual present, **only one person should be listed** on the statistical form. The counsellor should decide who the primary client is, and indicate their corresponding gender in this section.

Crisis Counselling:
Use this section to track the number of family members who called via the Contractor's toll free telephone number during a crisis situation. This includes cases that need to be addressed immediately or within the same day. This number will automatically be added to the **Total New Cases** line and should not be counted in the preceding categories.

TOTAL NEW CASES
The total number of new cases includes the number of 'Family Members (Without Employees)' and the number of 'Crisis Counselling' cases. This row will automatically calculate the total number of new cases.

MODE OF DELIVERY
Use this section to track the mode of delivery used to provide counselling services for all new cases. The total number of this section should be the same as the **Total New Cases** line.

Face-to-face:
Use this section to track the number of clients who attended counselling sessions in-person, under the headings 'Female', 'Male', or 'Other'.

Telephone:
Use this section to track the number of clients who attended counselling sessions by telephone, under the headings 'Female', 'Male', or 'Other'.

Online:
Use this section to track the number of clients who attended counselling sessions using various Internet-assisted modalities such as chat/text, email or video conference, under the headings 'Female', 'Male', or 'Other'.

i) **Chat:** synchronous communication between a client and professional counsellor via text.

ii) **Email:** non-synchronous, communication between a client and professional counsellor via secure e-mail.

iii) **Video Conference:** synchronous communication between a client and professional counsellor using devices with a built-in camera (laptop, tablet or smartphone) or a computer and webcam, and encrypted custom Internet software enabling both parties to see and hear each other.

CARRIED OVER CASES
Use this section to track the number of cases that were counted as a new case in a previous month and that are carried over to the current month.

TOTAL OPEN CASES
The total number of open cases includes the number of new cases and carried over cases for a given month. This row will automatically calculate the total number of open cases.

TOTAL CLOSED CASES
Indicate the total number of cases that were closed during each month.

AGE GROUP
Use this section to track the age group for every new case. If there is more than one individual present, the counsellor determines the primary client and selects their corresponding age group.

COUNSELLING
Use this section to capture statistical data on all open counselling cases.

Number of Sessions:
List the total number of sessions held with family members, in the current month.

Number of Session Hours:
Indicate the total number of hours spent providing counselling services. Increments of 0.25 hours (15 minutes) can be used to tabulate the time spent providing counselling. The number of session hours must be listed in the month in which they occurred.

Number of 'No-shows':
Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

Number of Cancellations:
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

REFERRAL SOURCE

Use this section to list the main referral source from which the first counselling visit originated, for each new case. The 'Total' line of this section should match the **Total New Cases** line.

Coordinator-counsellor

CRA employees who are qualified mental health professionals designated to coordinate, deliver, manage and monitor EAP services in their assigned area or region.

Family doctor or external health service

General practitioners, specialists, walk-in clinic physicians, hospital intake workers, nurses or physicians, etc.

Family member (CRA employee)

The client's spouse/partner, parent, or other relative (with whom the client lives with, and on whom they depend on financially) who is a CRA employee.

Self

When the client has self-referred, specify the source of the EAP contact information.

- **CRA External webpage**
  CRA EAP information posted on the public Canada.ca website.

- **CRA newsletter**
  CRA developed newsletter that included EAP information or the Contractor's EAP newsletter distributed internally.

- **EAP promo material**
  EAP flyer, pamphlet, fridge magnet, etc.

- **Social Media**
  Includes videos posted internally or on YouTube, and other media that touch on the EAP in general, etc.

- **Other**
  Indicate the source in the Comments section (e.g. was a previous client).

Unknown

Use this category if the client does not remember or prefers not to share the source of the referral.

Other

Specify the referral source in the Comments section.

Total

This line will automatically calculate the number of clients, by gender, for each referral source. The total number should match the **Total New Cases** line.

ISSUES

List the counselling issue(s) under the appropriate heading(s). If more than one issue is identified (e.g. alcohol and legal), **list all main issues**. Many times the issue(s) reported by the client at Intake (i.e. primary presenting issue) is not the primary issue as determined by the professional counsellor (i.e. primary assessed issue). Only the assessed issues should be tracked.

Addiction – Substance (self):
Client requests services for their own substance use or addiction (e.g. drug, alcohol, or other substance(s)).

Addiction – Substance (others):
Client requests services regarding the substance use or addiction (e.g. drug, alcohol or other substance(s)) of another person (e.g. family member, friend).

Addiction – Gambling (self):
Client requests services due to their own gambling behaviour or addiction (e.g. slot machines, poker, online gambling, etc.).

Addiction – Gambling (others):
Client requests services regarding the gambling behaviour or addiction (e.g. slot machines, poker, online gambling, etc.) of another person (e.g. family member, friend).

Addiction – Other:
Client requests services for other types of behavioural addiction (e.g. compulsive shopping, internet/video game addiction, sex addiction, etc.) for themselves or related to another person (e.g. family member, friend).

Family – Relationships:
Client requests services for relationship issues within their immediate or extended family (e.g. conflict between siblings).

Family – Children:
Client requests services for issues regarding their children (including foster children), step children, or children within their extended family. Includes parenting issues and concerns for the safety and well-being of a child.

Family – Couple:
Client requests services for relationship concerns with their spouse or partner (e.g. intimacy issues, conflict, communication, separation/divorce, etc.).

Family – Elder:
Client requests services regarding an aging family member, such as their parent, in-laws, or a member of their extended family.

Family – Violence:
Client requests services due to threatening, abusive or violent behaviour occurring in their home, including between teenage or adult children and other family members (i.e. sibling(s), parent(s)), and intimate partner violence. Clients may be the victim, perpetrator, or witness.

Family – Other:
Other family related issues for which the client is seeking counselling services. Specify the type of family issue in the Comments section.

Financial (stress):
Client requests services due to stress related to a financial matter.

Grief:
Client requests services related to grief and bereavement issues. Excludes suicide grief.

Health – Emotional/Mental (self):
Client requests services regarding their own emotional or psychological well-being (e.g. anger management, self-esteem issues, mental illness).

Health – Emotional/Mental (others):
Client requests services regarding someone else's emotional or psychological well-being (e.g. anger management, self-esteem issues, mental illness).

Health – Physical:
Client requests services regarding their physical well-being (e.g. health habits, lifestyle) and/or concerns (e.g. health condition/symptoms).

Legal (stress):
Client requests services due to stress related to a legal matter.

Relationships - Other:
Client requests services regarding relationships, other than with their immediate or extended family members and their work community. Examples include relationships with friends, neighbours, community or social group, etc.

Suicide - Own thoughts:
Client requests services regarding their own suicidal thoughts or behaviours.

Suicide - Other person:
Client requests services regarding concerns for someone else's (colleague, family member, friend, etc.) suicidal thoughts or behaviours.

Suicide - Grief:
Client requests services for grief and bereavement issues related to a death by suicide.

Work - Abuse, Threats, Stalking and Assaults against Employees:
Client requests services due to abuse, threats, stalking or assault directed at them or their property in the performance of their work duties, or as a direct result of their duties.

Work – Career:
Client requests services regarding career related issues, changes or decisions.

Work – Change:
Client requests services regarding a work-related transition (e.g. new process/procedure, new manager) or workplace change (e.g. office move or refit (Workplace 2.0)).

Work – Conflict (Peer):
Client requests services regarding a conflict with **a colleague**.

Work – Conflict (Supervisor):

Client requests services regarding a conflict with their immediate **supervisor or another superior**.

Work - Discrimination:
Client requests services related to discrimination in the workplace. Clients may be the subject of discrimination, the perpetrator or the witness.

Work - Handling of a Suicide Threat:
Client requests services regarding their experience in handling a suicide threat at work.

Work - Harassment:
Client requests services related to harassment in the workplace. Clients may be the subject of harassment, the perpetrator or the witness.

Work - Performance:
Client requests services regarding performance related issues (e.g. personal or work-related issue affecting their ability to meet performance targets/expectations, difficult performance evaluation, etc.).

Work - Retirement:
Client requests services in preparation for retirement.

Work – Return to Work:
Client requests services regarding return to work issues (e.g. apprehension/fear of returning after a long absence, challenges with their support plan or accommodation measures, etc.)

Work – Stress:
Client requests services regarding work related stress.

Work – Workforce Adjustment:
Client requests services regarding the impact of a workforce adjustment situation (e.g. downsizing or restructuring) on their personal and/or professional life.

Work – Workload:
Client requests services regarding workload issues (e.g. volume - too heavy/light, pace –too fast/slow, unreasonable deadlines, perceived workload inequities within team, etc.).

Work – Other:
All other work-related issues for which the family member is seeking counselling services. Specify the work-related issue in the Comments section.

Work-Life Balance:
Client requests services related to work-life balance (e.g. competing priorities between the responsibilities and pressures of work and those in other areas of the client’s life, such as family, friends and interests).

School – Stress:
Client requests services regarding school related stress (e.g. adjusting to new school or to university/college life, bullying, exams, etc.).

Trauma:
Client requests services regarding an emotional shock following a stressful event.

Other:
List all other issues for which the employee or family member is seeking counselling services.

REFERRED TO
Indicate the number of clients under their corresponding gender, referred to each of the resources. ‘Referred’ can include providing the client with the resource’s contact details, or calling the resource on their behalf if they are unable to make the initial step, etc. Include the resource(s) whether the client follows through with the referral.

Community Services – Long Term Therapy:
Includes referrals to longer term or specialized counselling or treatment, such as psychologists or addiction treatment services. Specify the type of community service in the Comments section.

Community Services – Other:
Includes referrals to medical practitioners, urgent care/walk-in clinics, support groups, etc. Specify the type of community service in the Comments section.

Coordinator-counsellor:
CRA employees who are qualified mental health professionals designated to coordinate, deliver, manage and monitor EAP services in their assigned area or region.

Human Resources:
Refers to HR Programs, such as the Informal Conflict Resolution Program, Occupational Health and Safety, the Early Intervention and Return to Work Centre, etc.

Management:
Refers to the employee’s direct team leader, supervisor or manager, or to another member of the management team.

Union:
This section refers to the employee’s designated union organization and/or union representative.

Other:
List all other resources that you have suggested to the client, in the Comments box.

TAB 3: ADVISORY SERVICES

ADVISORY SERVICES
This section includes the services delivered to supervisors, managers, union representatives or human resources professionals, such as advice and guidance, coaching, support and/or validation in relation to their role, to assist them in helping employees deal with personal or work-related issues that may be affecting their work performance and/or well-being.

MANAGERS

# of Managers:
List the total number of managers (including team leaders, supervisors and executives) who consulted for advisory services. Managers should only be counted once, regardless of how many

times they consult for the same issue. If a manager consults regarding a new/separate issue during the same fiscal year, they would be counted again as part of a new advisory consultation.

If several managers consult together, indicate the total number of managers in this section, but only count one consultation. If a manager attends the advisory consultation with a union representative and/or human resources professional, indicate all participants under their corresponding headings, but only count one consultation. In this last example, the counsellor will determine who the main client is, based on who will have requested the consultation, and will enter the consultation under that person's heading. Explain the reason why there are participants under a heading but no consultations, in the Comments section.

<u># of Consultations:</u>
List the number of consultations held with managers, including team leaders, supervisors and executives. The number of consultations must be listed in the month in which they occurred.

<u># Hours of Consultations:</u>
Indicate the total number of hours spent providing advisory services to managers, team leaders, supervisors and executives. Increments of 0.25 hours (15 minutes) can be used to tabulate the time spent in advisory consultations. Consultation hours must be listed in the month in which they occurred.

<u>Number of 'No-shows':</u>
Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

<u>Number of Cancellations:</u>
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

<u>ISSUES (Managers)</u>
List the number of times an issue was brought forward by managers, team leaders, supervisors and executives, under the appropriate heading(s). If more than one issue is identified (e.g. change and stress), **list all main issues.**

<u>Addictions:</u>
Client requests services regarding an employee's suspected or confirmed addiction problem (e.g. alcohol and/or other substances, gambling, etc.).

<u>Change:</u>
Client requests services regarding good people management practices relating to change (e.g. announcing a change in workload to an employee; dealing with questions and concerns due to a change in the workplace, etc.).

<u>Communication:</u>
Client requests services on improving their communication skills or on finding strategies to help improve communication within their team.

<u>Conflict:</u>
Client requests services regarding a situation at work in which they are experiencing difficulty working with an employee, or a situation of interpersonal conflict within their team.

<u>Critical Incident Stress Management (CISM):</u>

Client requests services following a critical incident in the workplace, such as a serious workplace accident, an armed or violent assault in the workplace, a natural disaster, etc. Includes the unexpected death of a colleague under tragic circumstances (i.e. suicide/homicide). Services center on the manager's role in supporting their employees and/or work team following such an event.

Disability/Return to Work:
Client requests services to help them address issues related to an employee with a disability, or regarding an employee's return to work following a short or long term absence.

Discrimination:
Client requests services regarding an employee's experience of perceived or actual discrimination in the workplace; the impact of discrimination on their team, or other issues stemming from perceived or actual discrimination in the workplace.

Family Related:
Client requests services regarding an employee's family related issue that is impacting their well-being or work performance (e.g. domestic violence).

General Inquiries about EAP services:
Client requests information regarding EAP support services. This category would be used when a manager requests services to better understand the role and responsibilities of the EAP counsellor, to get advice on how to recommend the EAP to their employees, as well as to receive information on learning solutions or other types of services that could benefit their team.

Grief:
Client requests services regarding grief and bereavement issues that are affecting an employee or their team.

Harassment:
Client requests services regarding an employee's experience of perceived or actual harassment in the workplace, the impact of harassment on their team, or other issues stemming from perceived or actual harassment in the workplace.

Mental Health:
Client requests services to better support an employee's emotional/psychological well-being or possible mental health issue. Issues such as anger management, low self-esteem and mental illness are also included in this category.

Performance Management:
Client requests services for support and guidance in addressing an employee's performance issue(s).

Stress (Self):
Client requests services regarding their own stress, resulting from their roles and responsibilities.

Stress (Employee or team):
Client requests services for advice and guidance on how to support an employee affected by workplace stress.

Suicide - employee disclosure:

Client requests services regarding an employee's disclosure of suicidal ideation or threat, or an employee's suicidal behaviour.

<u>Work/Life Balance:</u>
Client requests services on how to help employees achieve and maintain work-life balance.

<u>Workforce Adjustment:</u>
Client requests services regarding the impact of workforce adjustment, downsizing or restructuring situations, on their employees.

<u>Other:</u>
List all other issues for which the managers, team leaders, supervisors and executives, sought advisory services.

UNION REPRESENTATIVES

<u># of Union Representatives:</u>
List the total number of union representatives who consulted for advisory services. Union representatives should only be counted once, regardless of how many times they consult for the same issue. If a union representative consults regarding a new/separate issue during the same fiscal year, they would be counted again as part of a new advisory consultation.

If several union representatives consult together, indicate the total number of union representatives in this section, but only count one consultation. If a union representative attends the advisory consultation with a manager and/or human resources professional, indicate all participants under their corresponding headings, but only count one consultation. In this last example, the counsellor will determine who the main client is, based on who will have requested the consultation, and will enter the consultation under that person's heading. Explain the reason why there are participants under a heading but no consultations, in the Comments section.

<u># of Consultations:</u>
List the number of consultations held with union representatives. The number of consultations must be listed in the month in which they occurred.

<u># Hours of Consultations:</u>
Indicate the total number of hours spent providing advisory services to union representatives. Increments of 0.25 hours (15 minutes) can be used to tabulate the time spent in advisory consultations. Consultation hours must be listed in the month in which they occurred.

<u>Number of 'No-shows':</u>
Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

<u>Number of Cancellations:</u>
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

<u>ISSUES (Union Representatives)</u>
List the number of times an issue was brought forward by union representatives, under the appropriate heading(s). If more than one issue is identified (e.g. change and stress), **list all main issues.**

Addictions:
Client requests services regarding an employee's suspected or confirmed addiction problem (e.g. alcohol and/or other substances, gambling, etc.).

Change:
Client requests services regarding good people management practices relating to change (e.g. dealing with questions and concerns due to a change in the workplace, etc.).

Communication:
Client requests services on improving their communication skills.

Conflict:
Client requests services regarding a situation at work in which an employee is experiencing difficulty working with someone else.

Critical Incident Stress Management (CISM):
Client requests services following a critical incident in the workplace, such as a serious workplace accident, an armed or violent assault in the workplace, a natural disaster, etc. Includes the unexpected death of a colleague under tragic circumstances (i.e. suicide/homicide). Services center on the union representative's role in supporting an employee following such an event.

Disability/Return to Work:
Client requests services to help them address issues related to an employee with a disability, or regarding an employee's return to work following a short or long term absence.

Discrimination:
Client requests services regarding an employee's experience of perceived or actual discrimination in the workplace; the impact of discrimination, or other issues stemming from perceived or actual discrimination in the workplace.

Family Related:
Client requests services regarding an employee's family related issue that is impacting their well-being or work performance (e.g. domestic violence).

General Inquiries about EAP services:
Client requests information regarding EAP support services. This category would be used when a union representative requests services to better understand the role and responsibilities of the EAP counsellor or to get advice on how to recommend the EAP to employees.

Grief:
Client requests services regarding grief and bereavement issues that are affecting an employee.

Harassment:
Client requests services regarding an employee's experience of perceived or actual harassment in the workplace, the impact of harassment on a team, or other issues stemming from perceived or actual harassment in the workplace.

Mental Health:
Client requests services to better support an employee's emotional/psychological well-being or possible mental health issue. Issues such as anger management, low self-esteem and mental illness are also included in this category.

Performance Management:
Client requests services to better support an employee who has performance issues.

Stress (Self):
Client requests services regarding their own stress, resulting from their roles and responsibilities.

Stress (Employee or Team):
Client requests services for advice and guidance on how to support an employee affected by workplace stress.

Suicide – Employee Disclosure:
Client requests services regarding an employee's disclosure of suicidal ideation or threat, or an employee's suicidal behaviour. Client could also request services to better support employees following the suicide death of an employee.

Work/Life Balance:
Client requests services on how to help employees achieve and maintain work-life balance.

Workforce Adjustment:
Client requests services regarding the impact of workforce adjustment, downsizing or restructuring situations, on employees.

Other:
List all other issues for which the union representative sought advisory services.

HUMAN RESOURCES PROFESSIONALS

# of HR Professionals:
List the total number of HR professionals who consulted for advisory services. HR professionals should only be counted once, regardless of how many times they consult for the same issue. If a HR professional consults regarding a new/separate issue during the same fiscal year, they would be counted again as part of a new advisory consultation.

If several HR professionals consult together, indicate the total number of HR professionals in this section, but only count one consultation. If a HR professional attends the advisory consultation with a manager and/or union representative, indicate all participants under their corresponding headings, but only count one consultation. In this last example, the counsellor will determine who the main client is, based on who will have requested the consultation, and will enter the consultation under that person's heading. Explain the reason why there are participants under a heading but no consultations, in the Comments section.

# of Consultations:
List the number of consultations held with HR professionals. The number of consultations must be listed in the month in which they occurred.

Hours of Consultations:
Indicate the total number of hours spent providing advisory services to HR professionals. Increments of 0.25 hours (15 minutes) can be used to tabulate the time spent in advisory consultations. Consultation hours must be listed in the month in which they occurred.

Number of 'No-shows':

Indicate the total number of no-shows. ‘No-shows’ are occurrences where the client does not attend their scheduled appointment, without prior notice.

Number of Cancellations:
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

ISSUES (HR Representatives)
In this section, list the issues and the number of times an issue was brought forward by HR representatives. If more than one issue is identified during a consultation (e.g. change and stress), **list all main issues.** Use Comments section, if necessary.

TAB 4: SPECIALIZED CONSULTATIONS

Use this section to capture statistical data for specialized consultations held with CRA employees and family members, on legal and financial matters.

Employees (Alone):
Use this section to track the number of CRA employees who accessed specialized consultation services on an individual basis, under the headings ‘Female’, ‘Male’, or ‘Other’.

Employees & Family Member(s):
Use this section to track the number of CRA employees who accessed specialized Even though there is more than one individual present, **only one person (the employee) should be listed** on the statistical form, under their corresponding gender.

Family Members (Alone):
Use this section to track the number of CRA employees’ family members who accessed the EAP for specialized consultations services on an individual basis or as a family when the employee was not present (for example the employee’s spouse and their child). Even though there may be more than one individual present, **only one person should be listed** on the statistical form. The counsellor should decide who the primary client is, and track the information under their corresponding gender.

TOTAL NEW CASES
This row will automatically calculate the total number of new cases.

CARRIED OVER CASES
Use this section to track the number of cases that were counted as a new case in a previous month and that are carried over to the current month.

TOTAL OPEN CASES
This row will automatically calculate the total number of open cases.

TOTAL CLOSED CASES
Indicates the total number of cases that were closed.

AGE GROUP

Use this section to track the age group for every new case. If there is more than one individual present, the counsellor determines the primary client and selects their age group. The 'Total' line will automatically calculate the number of cases per age group.

FINANCIAL

# of Consultations:
Indicate the total number of consultations held with employees and/or family members for financial related matters. Include all initial and subsequent consultations.

# of Hours of Consultations:
Indicate the total number of hours spent in consultation for financial matters. Hours must be listed in the month in which they occurred.

of 'No-shows':
Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

# of Cancellations:
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

LEGAL

# of Consultations:
Indicate the total number of consultations held with employees and/or family members for legal related matters. Include all initial and subsequent consultations.

# of Hours of Consultations:
Indicate the total number of hours spent providing consultation for legal matters. Hours must be listed in the month in which they occurred.

Number of 'No-shows':
Indicate the total number of no-shows. 'No-shows' are occurrences where the client does not attend their scheduled appointment, without prior notice.

Number of Cancellations:
Indicate the total number of cancellations. Cancellations are defined as appointments that are cancelled with less than 24 hours notice.

TAB 5: INTERVENTIONS

GRIEF AND LOSS
In this section, track data related to grief and loss interventions. These sessions include those delivered in response to any experience of grief or loss that has affected a group of employees, and requires a group intervention.

Consultations:

List the number and duration of consultations that were held with managers, to determine if a Grief and Loss session was the appropriate intervention to meet the employees' needs.

Group Sessions:
List the number of Grief and Loss sessions that were held with groups of managers or/and employees. Include the number of hours spent facilitating these sessions.

Participants:
List the total number of participants in Grief and Loss sessions, for each month.

TOTAL # HOURS
This row will automatically calculate the total number of hours spent providing consultations and facilitating group sessions, related to Grief and Loss.

CRITICAL INCIDENT STRESS MANAGEMENT (CISM)
In this section, track data related to Critical Incident Stress Management (CISM) interventions. The CRA EAP defines a critical incident as any situation outside the range of normal experience that causes unusually strong emotional and/or physical reactions, either at the scene of the incident/event or later (e.g. line of duty death, armed or violent assault in the workplace, serious workplace accident). CISM is an adaptive, short-term psychological helping-process to enable an individual to return to their daily routine more quickly and with less likelihood of experiencing post-traumatic stress disorder.

Consultations:
List the number of consultations that you held with managers, to determine which CISM intervention, if any, was suitable to meet the needs of their employees or team.

Defusings:
List the number of defusings held as a result of a critical incident, as well as the number of participants. A defusing session is a three-phase structured small group discussion held within hours of a critical event. Its aim is to assess needs, triage individuals who may need further support, mitigate acute symptoms, assess need for follow-up and, when possible, provide psychological closure. It is conducted by one or preferably two trained mental health professionals (EAP coordinator-counsellor, external service provider counsellor, or other consultant).

Group Debriefings:
List the number of group debriefings held as a result of a critical incident, as well as the number of participants. A debriefing session is a seven-phase structured group discussion for small groups occurring usually within one to ten days after a critical event. It is conducted by a trained mental health professional (CRA EAP coordinator-counsellor, external service provider, or other consultant). Its aim is to facilitate closure, mitigate symptoms and triage individuals who may need further support.

Individual Interventions:
List the number of individual interventions, held as a result of critical incidents.

TOTAL # HOURS
This row will automatically calculate the total number of hours spent facilitating CISM interventions.

TAB 6: LEARNING SOLUTIONS AND PROMOTIONAL ACTIVITIES

LEARNING SOLUTIONS AND PROMOTIONAL ACTIVITIES

PROMOTION
In this section, indicate the number of occurrences and participants for every promotional activity.

EAP Orientation Sessions:
List the number of EAP orientation sessions that were delivered to CRA employees, and the total number of participants.

EAP Booth:
List the number of EAP booths that were held at various events, during which EAP information was provided to CRA employees.

EAP Booth (participants)**:**
To calculate the number of participants you must keep track of the number of employees who visited the booth. If this number is not available, use an approximation (e.g. the number of information sheets or other materials that were handed out can give an indication of the number of participants).

EAP Newsletter:
Indicate the number of newsletters that were issued in each month.

Other EAP promotional activities:
List the number of other promotional activities that occurred in each month and/or the promotional tools provided (e.g. fridge magnet). Specify the type of promotional activity or tool in the Comments box.

LEARNING SOLUTIONS
In this section, list the learning solutions that were delivered to CRA employees. Include the session titles, type (1 hour, 2-hour, half or full day), occurrences and number of participants. Learning solutions include educational sessions (e.g. lunch and learns, seminars, workshops) on topics related to issues of health and wellness of employees and managers (e.g. sessions on grief, parenting, stress management, balancing work and personal life).

TOTAL # OF HOURS
This row will automatically calculate the total number of hours spent delivering learning solutions.

TOTAL # OF OCCURENCES
This row will automatically calculate the total number of times learning solutions were delivered to CRA employees.

TOTAL # OF PARTICIPANTS
This row will automatically calculate the total number of employees who participated in learning solutions.