



EFR EMPLOYEE & FAMILY RESOURCES

Service Report

FOR

Sample Client

January 01, 2025 - December 31, 2025

Private & Confidential

UTILIZATION REPORT

Sample Client

January 01, 2025 - December 31, 2025 on New Files

UTILIZATION REPORT				
EAP Summary	Cases	%	Served	%
EAP Files	18	85.7%	18	39.1%
Management Referral	3	14.3%	3	06.5%
Information Calls	0	00.0%	0	00.0%
Togetherall- New Users	0	00.0%	25	54.3%
Total	21	100%	46	100%

Cases
Includes the total number of EAP cases opened with services provided in the report date range. A case may include multiple individuals/family members.

Served
Includes the total number of individuals served in the report date range.

EAP Utilization Rates
Utilization Rate
The total number of persons served divided by the employee population for the reporting period.

Based on an Employee Population of: 550
Annualized Utilization Rate
This is the "projected" yearly persons served utilization rate.

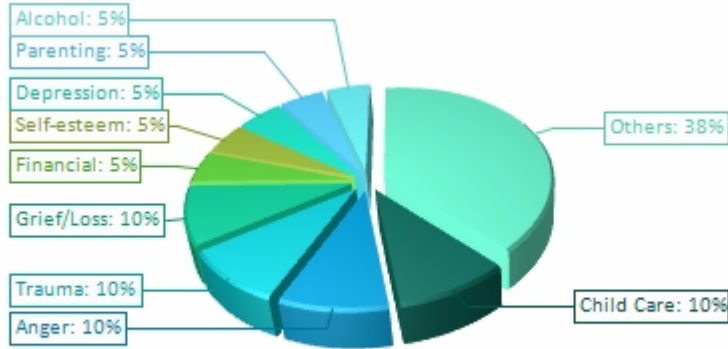
Utilization Rate (Served):	8.36%
Annualized Utilization Rate (Served):	8.36%

UTILIZATION REPORT

Sample Client

January 01, 2025 - December 31, 2025

Primary Presenting Issue by Case



Primary Presenting Issue by Case	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Alcohol	0	0.00%	1	14.29%	0	0.00%	0	0.00%	1	4.76%
Anger	0	0.00%	0	0.00%	2	40.00%	0	0.00%	2	9.52%
Behavioral/Child or Adolescent	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Child Care	0	0.00%	2	28.57%	0	0.00%	0	0.00%	2	9.52%
Depression	0	0.00%	0	0.00%	0	0.00%	1	50.00%	1	4.76%
Eldercare	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Family	0	0.00%	1	14.29%	0	0.00%	0	0.00%	1	4.76%
Financial	0	0.00%	0	0.00%	1	20.00%	0	0.00%	1	4.76%
Grief/Loss	1	14.29%	1	14.29%	0	0.00%	0	0.00%	2	9.52%
Legal	0	0.00%	1	14.29%	0	0.00%	0	0.00%	1	4.76%
Marriage/Relationship Stress	0	0.00%	1	14.29%	0	0.00%	0	0.00%	1	4.76%
Parenting	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Self-esteem	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Time Management	0	0.00%	0	0.00%	1	20.00%	0	0.00%	1	4.76%
Trauma	0	0.00%	0	0.00%	1	20.00%	1	50.00%	2	9.52%
Work attendance/timeliness	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Work Performance/Productivity	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Total	7	100%	7	100%	5	100%	2	100%	21	100%

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January 01, 2025 - December 31, 2025

Service Requested by Case



Service Requested by Case	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Child Care	0	0.00%	2	28.57%	0	0.00%	0	0.00%	2	9.52%
Counseling	6	85.71%	4	57.14%	4	80.00%	2	100.00%	16	76.19%
Elder Care	1	14.29%	0	0.00%	0	0.00%	0	0.00%	1	4.76%
Financial Consultation	0	0.00%	0	0.00%	1	20.00%	0	0.00%	1	4.76%
Legal Consultation	0	0.00%	1	14.29%	0	0.00%	0	0.00%	1	4.76%
Total	7	100%	7	100%	5	100%	2	100%	21	100%

UTILIZATION REPORT

Sample Client

January 01, 2025 - December 31, 2025

Employee/Family Member



Employee/Family Member	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Employee	6	85.71%	5	71.43%	4	80.00%	1	50.00%	16	76.19%
Family Member	1	14.29%	2	28.57%	1	20.00%	1	50.00%	5	23.81%
Total	7	100%	7	100%	5	100%	2	100%	21	100%

UTILIZATION REPORT

Sample Client

January 01, 2025 - December 31, 2025

Clients by Location



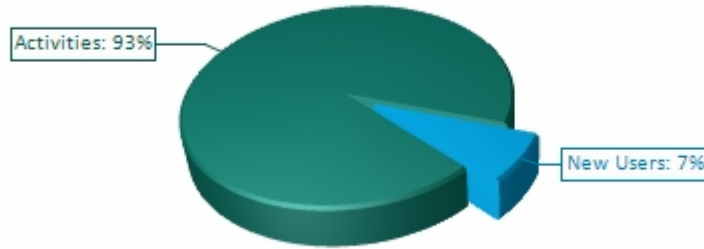
Clients by Location	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Main Office	7	100.00%	4	57.14%	5	100.00%	2	100.00%	18	85.71%
Remote Location	0	0.00%	3	42.86%	0	0.00%	0	0.00%	3	14.29%
Total	7	100%	7	100%	5	100%	2	100%	21	100%

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January 01, 2025 - December 31, 2025

Togetherall



Togetherall	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Activities	200	90.91%	0	0.00%	100	98.04%	25	100.00%	325	92.86%
New Users	20	9.09%	3	100.00%	2	1.96%	0	0.00%	25	7.14%
Total	220	100%	3	100%	102	100%	25	100%	350	100%

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Organizational Services



Organizational Services	1/1 - 3/31		4/1 - 6/30		7/1 - 9/30		10/1 - 12/31		1/2025 - 12/2025	
	#	%	#	%	#	%	#	%	#	%
Crisis Response	0	0.00%	0	0.00%	0	0.00%	1	50.00%	1	20.00%
Employee Orientation	1	50.00%	0	0.00%	0	0.00%	0	0.00%	1	20.00%
Quarterly Meeting	0	0.00%	0	0.00%	1	100.00%	0	0.00%	1	20.00%
Renewal Meeting	0	0.00%	0	0.00%	0	0.00%	1	50.00%	1	20.00%
Training- Included	1	50.00%	0	0.00%	0	0.00%	0	0.00%	1	20.00%
Total	2	100%	0	0%	1	100%	2	100%	5	100%

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DATE	EVENT TYPE	LOCATION	DETAILS	NUMBER ATTENDED
1/20/2025	Employee Orientation	Remote Office	Employee Orientation	25
1/29/2025	Training- Included	Main Office	"Building an Effective Team"	53
7/11/2025	Quarterly Meeting	Zoom Meeting	Quarterly Meeting	4
10/8/2025	Renewal Meeting	Zoom Meeting	Renewal Meeting with Account Manager	4
12/30/2025	Crisis Response	Main Office	Provider on-site for 2 hours	10
TOTAL ATTENDEES:				96