

Scope of practice

Lumino Health Virtual Care Employee Assistance Program (EAP), by Dialogue



The EAP experience

- **Seamless** virtual care experience
- **Family and dependents** included
- **On-demand** access to helpful articles on work and life balance topics
- **24/7 access** to internet-based cognitive behavioural therapy (iCBT) toolkits
- **Follow-up appointments** after each session

Access to each service begins with an intake experience. If a plan member self-identifies as being in a crisis or emergency situation, they'll be immediately connected with a Mental Health Specialist. They'll provide the plan member with support to ensure they're triaged properly. This could include a referral to emergency services/911.

Services	Number of sessions
Mental health	Up to four sessions per concern, with support for an unlimited number of concerns.
Family and relationships	Up to four sessions per concern, with support for an unlimited number of concerns.
Child and elder care	One session per concern, with support for an unlimited number of concerns.
Diet and nutrition	Up to four sessions per concern, with support for an unlimited number of concerns.
Work and career	Up to four sessions per concern, with support for an unlimited number of concerns.
Manager consultation and referral	Up to four sessions per concern, with support for an unlimited number of concerns.
Legal	One initial session with follow-ups as needed.
Finance	Up to two sessions per concern, with support for an unlimited number of concerns.

Critical Incident Response

Critical Incident Response is an optional service within the EAP. It can be requested by an employer. It provides flexible support and psychological first aid to plan members for traumatic events that occur in the workplace. An hourly rate applies and the cost is billed directly to employers.

Workplace Referral

Workplace Referral is an optional service within the EAP. It can be requested by a people leader or Human Resources if it's noticed that an employee is experiencing mental health concerns and/or substance use challenges. An additional fee will apply, and the cost is billed directly to employers. Click [here](#) for more information.

Note: The scope of practice for the Lumino Health Virtual Care EAP is subject to change and can be updated at any time.

Mental health – scope of practice

In all cases the request will be evaluated. The multidisciplinary team can also help plan members find clinics, specialists, and community resources with specific criteria appropriate for their current needs, thanks to an updated and rich database of health and well-being providers. Support for finding clinics, specialists, and community resources will also be provided.



What is supported

Risk assessment and goal-focused coaching using a patient-centered, collaborative approach.

Issues covered include but are not limited to:

- Mood disorder symptoms (depression, anxiety, etc.)
- Adjustment disorder
- Stress management
- Sleep hygiene
- Anger and emotional regulation
- Grief and loss
- Workplace stress and burnout
- Self-esteem
- Social isolation

In the case of an emergency, plan members are immediately connected with a Mental Health Specialist (MHS) for assistance.



Not supported

- Mental disorder diagnoses
- Long-term counselling
- Post-traumatic stress disorder or trauma
- Complete treatment of addiction or substance use disorder
- Eating disorders
- Psychiatric assessment
- Complete treatment of personality disorders
- Child (under 14) evaluations and treatment
- Life-threatening conditions
- Diagnostic assessment for autism spectrum disorders, attention deficit disorders, giftedness, or learning disabilities
- Other consultations deemed necessary by our specialists



Family and relationships – scope of practice

In all cases, the request will be evaluated. The multidisciplinary team can also help plan members find clinics, specialists, and community resources with specific criteria appropriate for their current needs, thanks to an updated and rich database of health and well-being providers. Support for finding clinics, specialists, and community resources will also be provided.



What is supported

Risk assessment and coaching using a patient-centered, collaborative approach. Issues covered include but are not limited to:

- Caregiver-related concerns
- Relationship breakdown
- Improving communication with your partner or a family member
- Conflict resolution
- Challenging family/relationship dynamics
- Improving intimacy
- Parenting skills for challenging adolescent and child behaviours
- Help for anxious couples or parents
- Parent and relationship empowerment



Not supported

- Long-term counselling or therapy
- Domestic violence counselling
- Psychiatric assessment
- Mediation
- Conflict resolution as part of a divorce or separation negotiation



Child and elder care – scope of practice

In all cases, the request will be evaluated. The multidisciplinary team can also help plan members find clinics, specialists, and community resources with specific criteria appropriate for their current needs, thanks to an updated and rich database of health and well-being providers. Support for finding clinics, specialists, and community resources will also be provided.



What is supported

Risk assessment, resource connection and guidance for navigating the public and private healthcare systems.

Assistance navigating childcare

- Special needs
- Orthopedagogy (dyscalculia, dyslexia, etc.)
- Motor skills development
- Listing of daycares
- Language difficulties
- Attention-deficit hyperactivity disorder/
Attention-deficit disorder diagnosis

Assistance navigating elder care

- Community programs
- Residential care options
- Home support services



Not supported

- Navigation to adoption resources
- Psychosocial assessments
- In-house services (e.g. babysitting, home-care, occupational therapy)
- Referrals for long-term elder care



Diet and Nutrition - scope of practice

The plan member's needs will be evaluated and their situation will be managed safely and effectively. Support for specialized or long-term support (clinics, specialists, community resources, etc.) will be provided.



What is supported

Including but not limited to:

- General healthy eating and disease prevention
- Weight management (weight loss, weight gain)
- Meal planning strategies, eating on a budget
- Type 2 diabetes, pre-diabetes and gestational diabetes
- PCOS nutrition management
- Cardiovascular disease (cholesterol, hypertension)
- Osteoporosis/bone health, thyroid health, menopause
- Vegetarian, vegan, or plant-based diet
- Nutrient deficiencies (Anemia/iron deficiency, B12, vitamin D)
- Digestive issues (IBS, IBD, celiac disease, diarrhea, constipation, bloating, acid reflux, gastritis, fatty liver, gallstones, diverticular disease)
- Mild kidney disease, gout
- Nutrition for preconception/fertility, throughout pregnancy and post-partum
- Introducing solids for infants
- Food allergies, or intolerances, picky eating
- Nutrition for recreational physical activity, hydration, optimizing energy levels
- Mindful and intuitive eating, emotional eating and developing a positive relationship with food



Not supported

Including but not limited to:

- Diagnosed eating disorders
- Nutrition for rare diseases or requiring specialized nutrition care (e.g. epilepsy, Cystic Fibrosis, Type 1 diabetes, CKD stages 4-5)
- Diets, for example: Ketogenic diet, etc.
- Pediatric cases impacting growth and development, chronic disease management in children
- Lactation consultation
- Peri-op bariatric surgery
- Nutrition for competitive sports/athletes
- Dysphagia assessments
- Long-term nutritional follow-up
- Analysis of food journals, building or providing a calculated/restrictive meal plan

*Please note that Nutrition coverage is available for all Canadian provinces except PEI & NL.

Work and career – scope of practice

In all cases, the request will be evaluated. The team of career counselors can also help plan members find specialists and community resources adapted to their specific needs, thanks to a rich database of well-being services. Support for finding clinics, specialists, and community resources will also be provided.



What is supported

Brief solution-focused counselling using a patient-centered, collaborative approach. Issues covered include but are not limited to:

- Self-knowledge (e.g. interests, values, and strengths)
- Educational and professional information
- Career assessment and work performance (e.g. inventory of skills developed)
- Career management tools
- Employability coaching (e.g. networking skills development)
- Motivation in the workplace
- Workplace tension (e.g. communication with colleagues/manager)
- Retirement and life projects
- Academic challenges
- Career exploration for youth
- Stress management and work–life balance



Not supported

- Employee/employer or manager mediation
- Long-term counselling
- Human resources, labour law, and insurance issues
- Psychotherapy or treatment for mental health conditions
- Communication with external resources



Manager consultation and referral – scope of practice

People leaders will be connected with a mental health specialist or career counselor, depending on their needs. The team will work with them to address their concerns. Resources and strategies will be provided to help support them in their role as a people leader.



What is supported

Coaching and support for people leaders, related to concerns regarding their employees. Issues covered include but are not limited to:

Mental health-related concerns:

- Managing employees struggling with a mental health issue
- Employee motivation
- Effective communication with employees

Workplace/career concerns:

- Leadership and organizational changes
- Managing employees remotely
- Performance-related issues

Manager referral: If necessary, people leaders may need to refer an employee to the EAP. If that's the case, they'll be guided in the steps they'll need to take and provided with the resources to help them motivate the employee to reach out to the EAP directly to get the support they need. The scope of practice will vary depending on the services the employee has access to.



Not supported

- Specific human resources questions and concerns
- Insurance-related questions
- Legal questions
- Imminent suicidal ideation. If you're in a crisis or an emergency situation you should call 911.



Legal services – scope of practice

The legal information provided by the lawyer is to educate the Client on Canadian law (except employment and immigration law) and the legal system in general terms. The lawyer can also conduct research, make referrals to the appropriate bar association, and propose follow-ups as needed. The legal service is not for legal advice or representation.



What is supported

Family Law

- Child custody
- Child support
- Common law spouse
- Marriage
- Divorce
- Separation

Civil Law

- Consumer protection
- Contracts
- Small claims
- Marriage
- Divorce
- Separation

Wills & Estates Law

- Planning & administration
- Trusts

Criminal Law

- Adult offence (18+)
- Driving under the influence (DUI)
- Youth offence (<18)

Legal – Persons

- Civil status (change of name, sex, etc.)
- Human rights
- Power of attorney
- Protection of personal information

Penal Law

- Licenses and permits
- Regional by-laws
- Traffic violations

Property Law

- Leases
- Commercial
- Goods and merchandise
- Residential (landlord/tenant)
- Real estate
- Joint tenancy
- Neighbour conflicts
- Ownership



Not supported

- Immigration law
- Employment law
- Providing legal advice or representation



Finance – scope of practice



What is supported

Information on, but not limited to, the following topics:

- Real estate/mortgages: planning for purchases
- Budgeting: going through a budget together
- Estate: will, mandates of incapacity, power of attorney, testamentary trusts
- Debt/credit: different options available to you
- Bankruptcy: what risks are involved
- Taxes: tax credits, registered accounts, tax-efficient investments, strategies, and tax brackets
- Marriage/divorce: spousal support, child support, rights of transfer of pensions
- General investing guidance and referrals to investment planners
- Employment transition
- Retirement: goal setting, planning and investing accordingly



Not supported

- Direct investment advice about specific investments
- Financial product sales
- Taxes: tax preparations, creating holding companies, income vs dividend payments
- Bankruptcy: if you declare bankruptcy
- Marriage/divorce: legal advice and expectations of financial benefits
- Estate: how to write a will, legal advice, tax consequences



Self-led and coach-led iCBT - scope of practice

The Internet-based Cognitive Behavioural Therapy (iCBT) Self-Care Toolkits can be explored independently and/or with the support of an iCBT coach. This flexibility empowers plan members to manage their mental health at their own pace, with or without a therapist.



What is supported

Including but not limited to:

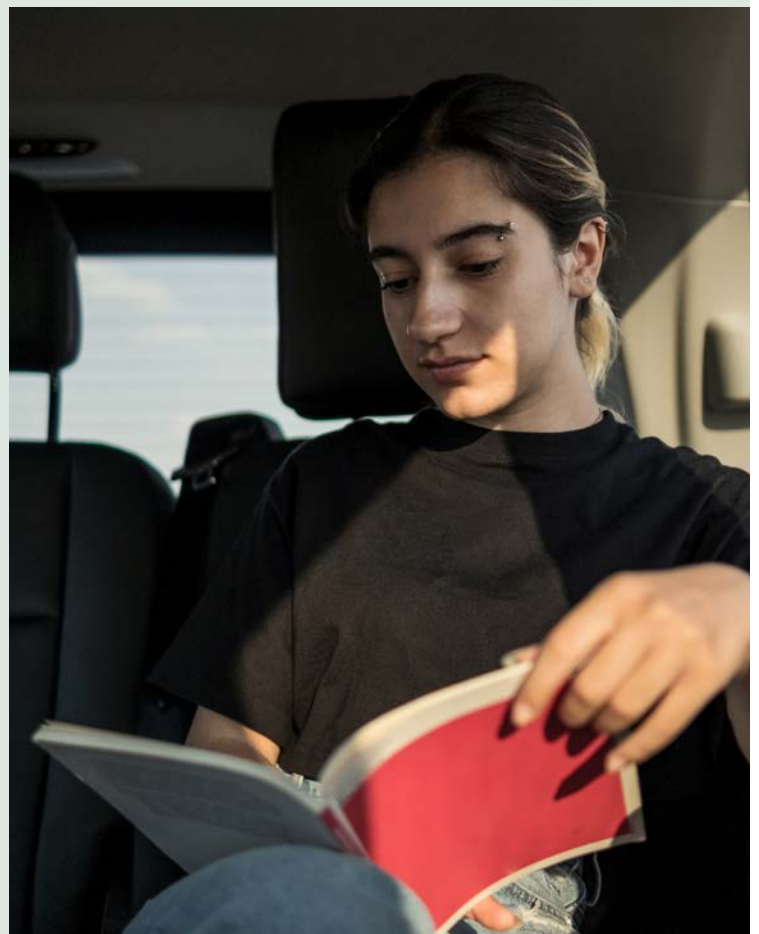
- Depression
- Anxiety and worry
- Social anxiety
- Loss and bereavement
- Separation and Divorce

If the plan member chooses to get support from an iCBT coach, the coach will navigate and motivate them using the same modules in the Self-Care Toolkit. In the case of an emergency, the plan member is immediately connected with a Mental Health Specialist for assistance.



Not supported

- Life-threatening conditions
- Disorders including: paranoid personality disorder, antisocial personality disorder, somatoform disorder, active psychosis, eating disorders
- Not suitable for plan members under 16 years of age
- Other consultations deemed necessary by our specialists



Substance use - scope of practice

In all cases, the request will be evaluated. Support for specialized or long-term support (clinics, specialists, AA groups, community resources, etc.) will be provided.



What is supported

Help with managing the underlying mental health issues and root causes that manifest as substance use, when possible. Including but not limited to:

- Work stress and burnout
- Anger and emotional regulation
- Grief and loss
- Self-esteem



Not supported

- Managing active substance use addictions or mental health issues that require longer-term support from specialized treatment facilities to ensure plan member safety.



Workplace referral – scope of practice

Workplace referral is an optional service that can be included within the EAP at an additional cost. It supports employees experiencing mental health concerns and/or substance use challenges.

This service can be requested by a people leader or Human Resources manager if they notice a team member experiencing mental health or substance use challenges affecting their workplace behaviour, performance, or relationships. An additional fee will apply, and the cost is billed directly to the employer by Dialogue.

The plan member will be contacted for their verbal and written consent, to conduct an assessment and offered treatment based on their needs. The manager will then receive regular and confidential reporting on the plan member's attendance, participation level and progress of session completion.



What is supported

Mental health counselling, therapy, and coaching for plan members. Including, but not limited to:

- Support for mental health issues as covered in our EAP's **Mental Health scope of practice**, such as anger management, conflict resolution, stress, grief, etc.
- Mental health support for managing substance use, including smoking cessation.



Not supported

- Same exclusions as our EAP's **Mental Health scope of practice**.
- All other work-life services included in the base EAP (i.e. financial, legal, etc.).

Available anytime upon request for an additional fee.



Your Employee Assistance Program

In full compliance with Canadian regulations on virtual care, an in-person visit (outside of the EAP care team), is mandatory for:

- Substance use requiring in-patient treatment.
- Life-threatening conditions for the plan member or those around them.
- Condition requiring an imminent psychiatric assessment.
- Condition requiring long-term treatment and regular follow-ups with a multidisciplinary team.
- Evaluation and treatment for children (14 and under).

Night shift scope of practice: What changes?

We're available to you during nighttime hours from 10 p.m. to 6 a.m. To provide high-quality, complete, and timely care, some requests made at night might be directed to a consultation during the day. These cases are usually the ones that require coordination between different EAP providers who are unavailable at night.

This includes non-acute mental health concerns, career counsellors, financial advisors and legal counsellors.

Who is eligible?

- Plan members of an organization subscribed to the Sun Life EAP, and their immediate family (limited to spouse and children) for organizations with family access.
- Plan members can't consult on behalf of someone else for legal reasons (exception for children under 14).
- Children under 14 years of age can't consult the service on their own (book an appointment, speak to a practitioner). Plan members (14 and above) can consult on behalf of a child or about issues related to a child and will be supported with resources/coaching to address the child's needs.
- Children aged 14 and older are required to have their own Sun Life EAP account and can't use their parents' accounts.
- Plan members are required to be physically located in Canada when using the EAP. It's not possible to use our services from elsewhere except for administrative tasks (e.g. booking appointments).

Dialogue Health Technologies Inc. is a wholly-owned subsidiary of Sun Life Assurance Company of Canada operating as a standalone entity. All representations about the services of Lumino Health Virtual Care Employee Assistance Program (EAP), provided by Dialogue are those of Dialogue, Inc. and not Sun Life Assurance Company of Canada. Sun Life Assurance Company of Canada cannot guarantee the availability of the services and reserves the right to cancel the services with notice.

Life's brighter under the sun

Group Benefits are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies. VC9346 09-25 ri-cd

