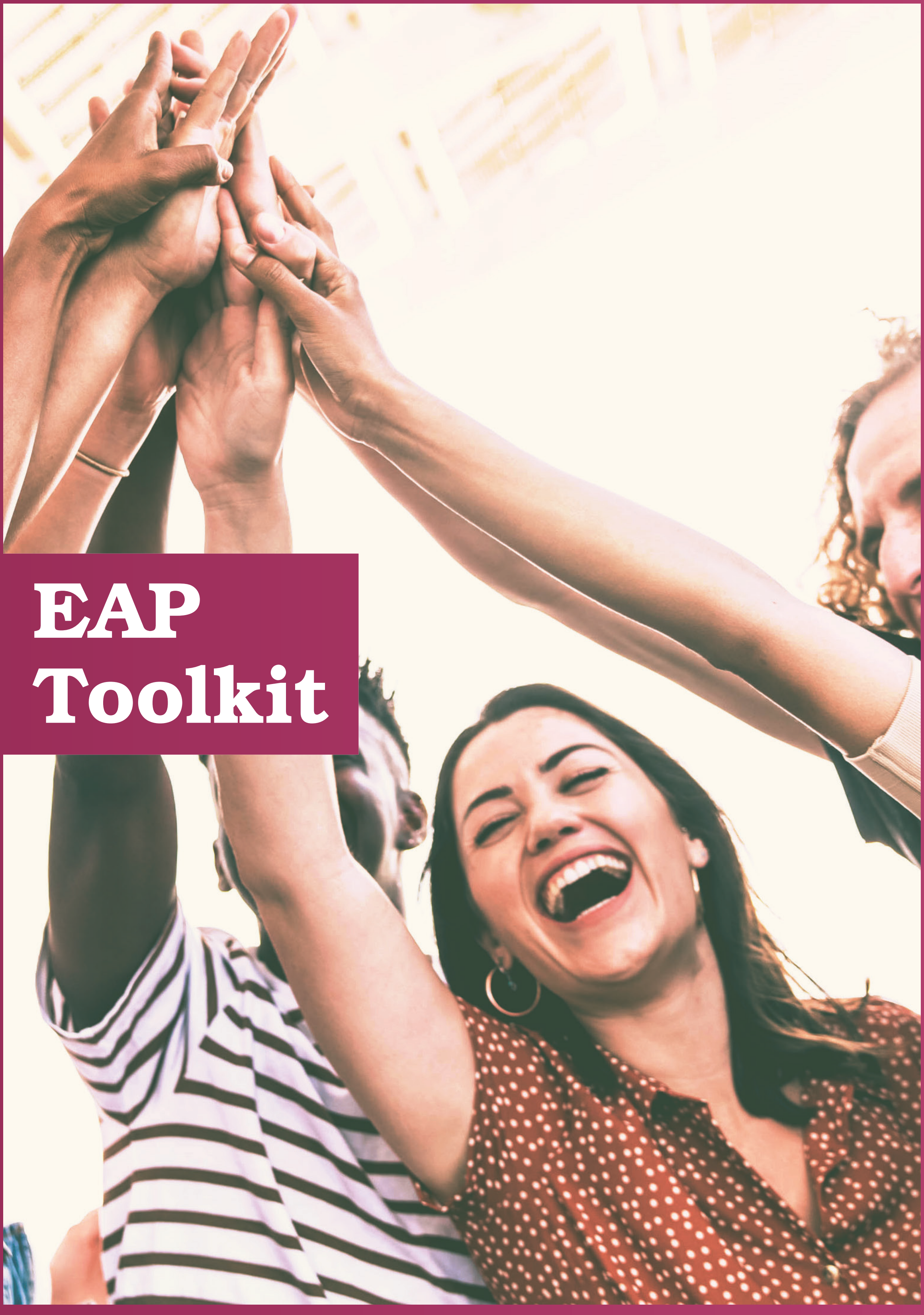

EAP Toolkit

canopy
innovative wellbeing

Introduction

Canopy partners with you to provide employees with emotional and practical care to boost quality of life and organizational success.

This resource guide describes our organizational support and how to optimize utilization of Canopy's services. Our focus is to provide solutions that fit your organization's unique needs and goals.

What our members are saying...

I just wanted to thank Canopy for the great Lunch & Learn today! I really appreciated all of your insights on the differences between stress and burnout and how to manage this.

I've obtained services through Canopy (formerly Cascade Centers). I was treated with respect and empathy... As an HR professional, I am confident and happy to refer our employees for services.

Best EAP I've ever worked with in my entire career. Canopy provided support through a number of critical and sensitive situations. Even during the beginning of COVID, the resources for leaders were really helpful before a lot of other information was available. Very robust resources!

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Organizational Development*
- Mental Health Support & Response at Work
- Mental Health Support & Response for Leaders

All topics are 1 hour in length, except where marked with an asterisk*.

Please allow 3 - 4 weeks notice for scheduling.

*Additional fees may apply. Customized training available, please contact us if you do not see something that fits your needs.

Financial Education*

- 30 Ways to Trim Your Budget
- After Identity Theft
- Are You Financially Healthy?
- Basics of Personal Finance
- Breezing Through the Holidays
- Checking 101
- College Financing 101
- Credit Card Makeover: Getting Out of Debt
- Digital Financial Services
- Drive Away Happy: Car Buying Decision
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- Solving the Mystery Of Credit Reports
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- The Sandwich Generation
- Understanding Credit
- Using Credit Cards Wisely
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- Your Guide to 529 College Savings Plans

Legal and Identity Theft*

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- Avoiding Tax Filing Fraud
- Battling Unemployment Fraud
- Data Breach Education
- Elder and Disability Care
- Estate Planning 101
- ID Theft Protection 101
- Planning For Future Medical Decisions
- Personal Data Security
- Social Media Privacy

***Additional fees may apply.**

Webinars...continued on next page

HR Webinars

Each year Canopy provides a webinar series designed specifically for Human Resource Professionals. These webinars are free and are approved for one (1) SHRM credit. Visit: canopywell.com/HR-Webinars to learn more and register.

SHRM
SHRM-CP | SHRM-SCP
RECERTIFICATION
PROVIDER
2023

Monthly Member Webinars

Canopy's Webinars are generally one hour in length and topics include mental/emotional concerns, relationships, finances, legal concerns, wellness, communication, and more. Visit: canopywell.com/Webinars to learn more and register.


BINAR

Learning Centers

- Anger
- Anxiety
- Budgeting & Saving
- Building a Respectful Workplace
- Building Resilience
- Communication
- Conflict Management
- Depression
- Digital Wellness
- General Wellbeing
- Goal Setting
- Gratitude
- Grief
- Investing 101
- Loneliness
- Mindfulness
- Raising Resilient Kids
- Relationships
- Relaxation and Meditation
- Retirement
- Sleep Health
- Stress
- Substance Misuse

To Access:

1. Visit my.canopywell.com
2. Register as a new user or log in
3. Click 'Visit Learning Center'

Supervisor and Organizational Support

Canopy EAP helps you improve productivity, employee morale and work engagement. We can help you be a proactive manager.

As a supervisor or manager, you navigate workplace challenges on a daily basis. However, some issues go beyond typical concerns such as job performance. If an employee comes to you with a personal problem, will you know what to say? If a tragedy impacts your team, can you provide support while maintaining a stable work environment? How do you deal with an employee's unexpected or inappropriate behavior?

Canopy's experienced team provides your organization with the support needed to decrease employee related concerns and improve quality of life.

Unlimited Consultation

Canopy offers unlimited supervisor consultation with an experienced and specialized team of professionals. We provide expert consultation and help when an employee's personal problems begin to impact the workplace. Canopy assists you in staying focused on work issues while supporting the employee in overcoming personal obstacles.

Connect with us when:

- Personal problems negatively impact the workplace
- Conflicts between employees arise
- Tragedy impacts your team
- Substance abuse is suspected or confirmed
- Performance issues or other concerns arise

Supervisor and Organizational Support (continued)

Unlimited Performance Based Referrals

A management referral to Canopy EAP can be a powerful tool in helping an employee improve job performance. The focus is on helping the employee be successful and reaching the goals set by the employer. When you formally refer an employee to the EAP, a signed release of information is required, and allows the release specific information:

- **Completion of EAP Evaluation**
- **Compliance with Recommendations**
- **Ongoing Case Management and Consultation**

Confidentiality standards forbid the EAP to provide information about an employee who uses the service.

If you have formally referred an employee and notified the EAP, a form will need to be signed by the employee to release specific information.

More information about
performance based referrals

Situational Support

Managers and leaders have been navigating new challenges, difficult conversations, and unprecedented times. Contact the EAP for resources and support regarding:

- **Suicide Prevention and Mental Health Awareness**
- **Coping with Racism and Violence**
- **Navigating Trauma and Loss**
- **Career Development and Workplace Reintegration**

Micro Trainings for Leaders Video Series

Topics include Assisting Employees with Mental Health Concerns, Managing a Remote Team, and more. Log onto the EAP member site at my.canopywell.com to learn more.

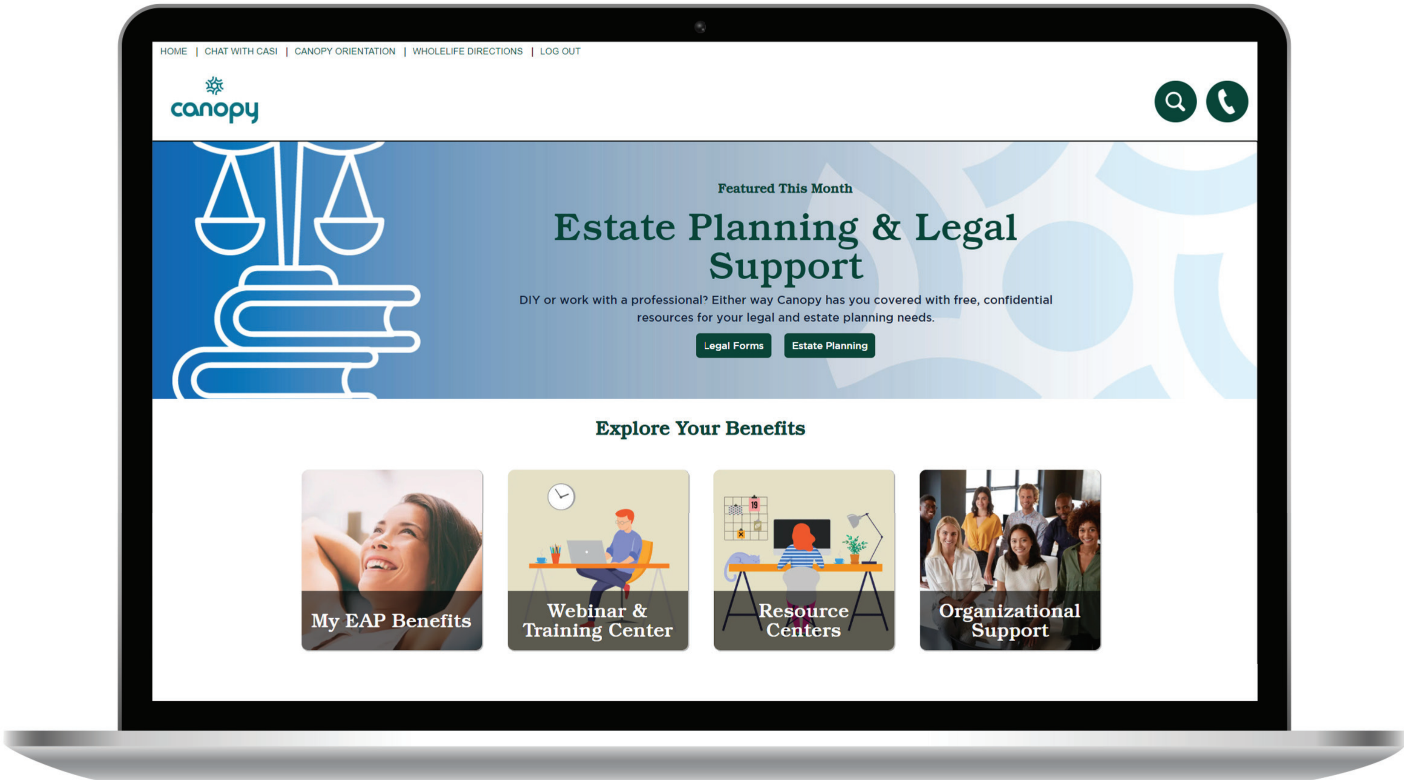
Leadership Development

Customizable to specific client needs. Schedule a consultation to determine ways we can support:

- **Professional development and growth**
- **Leading through change**
- **Managing interpersonal conflict**
- **Success in a new role**
- **Engagement and burnout**

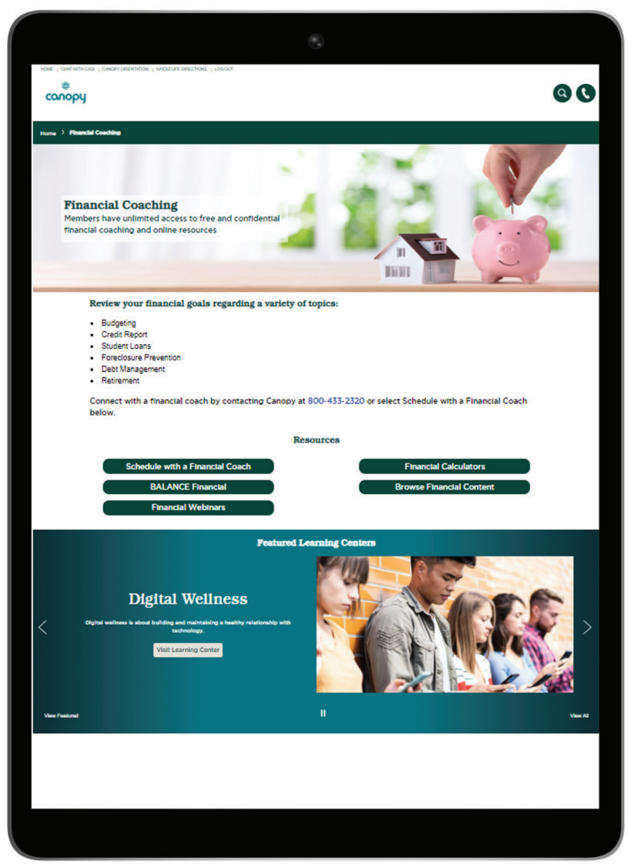
"Canopy has the tech, resources, and expertise, we look for in our EAP."

Interactive Resources To Support Organizational Success



To Access:

1. Visit: my.canopywell.com
2. Register: As a new user or log in
3. Click: "Organizational Support" Tile



Group Critical Incident Response (CIR):

Our trained facilitators provide managers and employees with crisis support within 48-72 hours following a disruptive event. Research shows this to be the window of time when people receive the most benefit from the service. Debriefings speed the recovery process and help employees feel supported.

CIR guidelines:

As a manager or supervisor, you play an important role in providing support to employees following a critical incident. Employees will need emotional support and understanding while you focus on maintaining a stable environment.
In preparing for a CIR, it is important to let people know that a counselor will facilitate a group meeting. Here are some guidelines when organizing a CIR:

- **Find a room that is private and quiet.**
- **Anticipate the duration of the CIR to be between 1-1.5 hours.**
- **Encourage people to attend.**
- **To start the intervention, the counselor will outline the meeting framework and encourage people to participate at their own comfort level. The counselor will then facilitate an exploration of the incident, including facts, thoughts, feelings, and reactions to the event.**

Example of correspondence to employees about the group session:

On *(insert day and date here)*, a counselor from Canopy Employee Assistance Program will meet with us as a group from (*time*). The counselor will facilitate a discussion allowing you to explore thoughts and feelings related to the (*insert description of incident here*), and to help you identify coping mechanisms. You are invited to attend the meeting and participate at your own comfort level.

Individual Consultation

A one-on-one consultation with a counselor includes check-in, supportive listening, problem-solving for immediate needs, assessment of mental/emotional health, and making recommendations as needed. It's often reported that employees feel cared for and validated by their employer when one-on-one consultations are provided following a traumatic event. Additional costs may apply for this service.

Canopy offers sessions specific to people of color to help address unique experiences and concerns.

Program Promotion

Traits of EAP Customers with Successful Utilization

- **Supervisors are knowledgeable about the EAP**
- **There is a strong partnership between HR and EAP**
- **Utilization of EAP promotional tools**
- **Strong emphasis on confidentiality**

Planned and Sustained Promotion for Organizational Success

Canopy makes promotion of the EAP easy for HR and Benefit managers with our monthly service flyers. Each month Canopy will email the designated employer representative a flyer promoting a specific service within the EAP. Canopy offers a set schedule of monthly topics, or can customize a monthly promotion plan based on the goals of your organization.

January: New Year, New You	**February:** Relationships	**March:** Housing Support + Financial	**April:** Burnout
May: Mental Health Awareness	**June:** Diversity	**July:** Resources for Caregivers	**August:** Legal + ID Theft
September: Suicide Awareness	**October:** Substance Misuse	**November:** Coaching	**December:** Stress Management

Promotional Strategies

- Supervisor training
- Partnership benefit champions
- Employee orientation video
- Home mailers and hard copies
- Alternate and humorous posters
- Customized materials
- Benefit integration
- Monthly promotional campaigns
- Customize EAP Member Site
- Promotion on social networking

Connect with your Customer Success Manager to build the right combination of promotional materials that work best for your organization.

We offer hard copy materials, regular e-communication, and promotional flyers for a wide range of scenarios:

- General Service Flyers
- Resource Guides
- Flashmail
- Industry Specific

View our full EAP Promotional Guide to see a full menu of options, learn more about e-communication delivery schedule, and more.

Don't see what you're looking for? Our team is happy to create customized materials if needed.

Click here to view our promotional materials

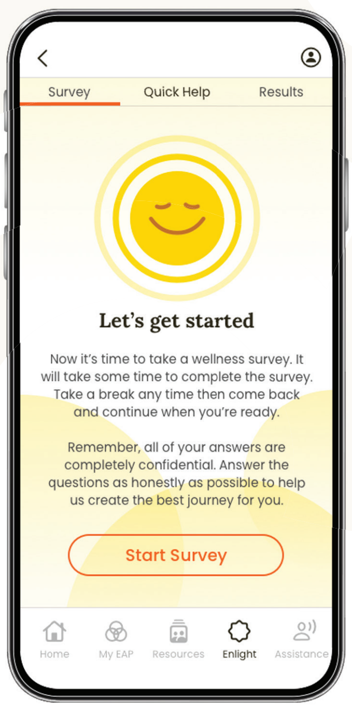
Program Enhancements

Digital Behavioral Health Solutions

Features include:

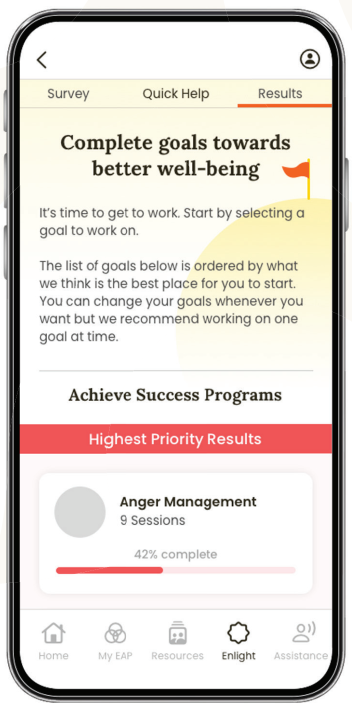
- Instant access to evidence-based therapeutic tools
- Self-paced, interactive programs
- Engaging videos, resilience and mindfulness techniques
- Personalized mental health evaluation

1.



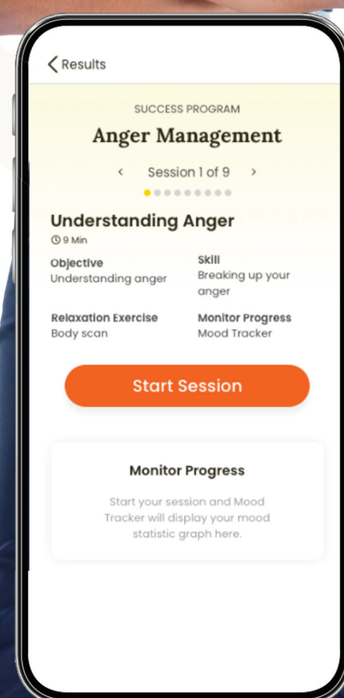
Take the quiz

2.



Select a goal

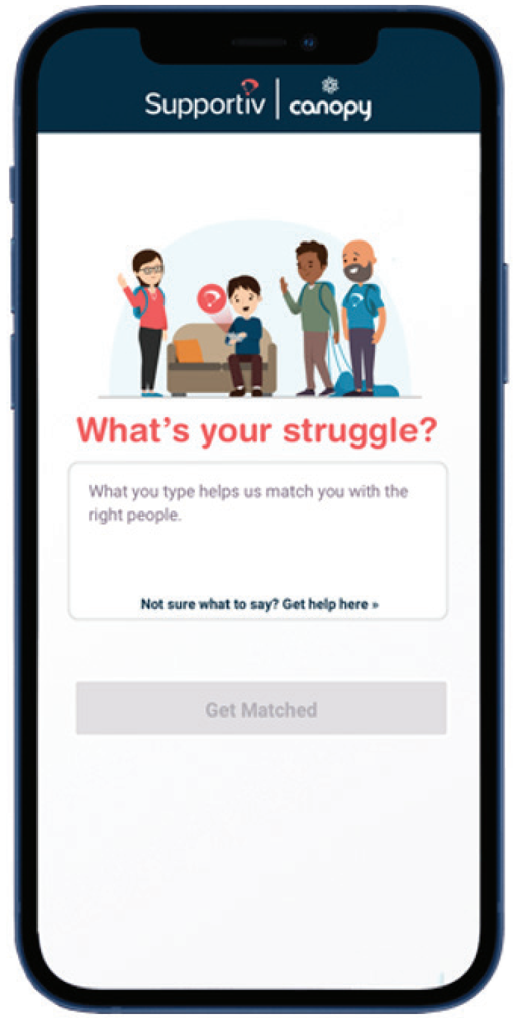
3.



Start your session

Virtual Peer to Peer Support

In a continued effort to expand points of access to care, Canopy is excited to bring you Supportiv. Using AI-driven Natural Language Processing to immediately match users for always synchronous, always moderated peer-to-peer chat-based support on any topic 24/7. Peer-to-peer support is the stigma-free way to engage with other individuals who are experiencing similar situations.



Peer-To-Peer Chat-Based Support On Any Topic 24/7.

Anonymous & Secure

Conversations are completely confidential. Your identity is anonymous. You don't have to enter any personal information, ever.

Human-Centered

Our trained moderators guide 100% troll-free conversations and make spot-on recommendations to help you feel better.

Always There

Users like you are connecting in our groups around the clock, which means support is available to you anytime.

Resource-Full

It's not just talking. We'll also suggest articles, videos, podcasts, and services to help you get through the struggle.

Mental Health Support & Response

Canopy's proprietary certification program helps participants support employee mental health in the workplace. It is evidence-based, experiential and provides practical skill building.

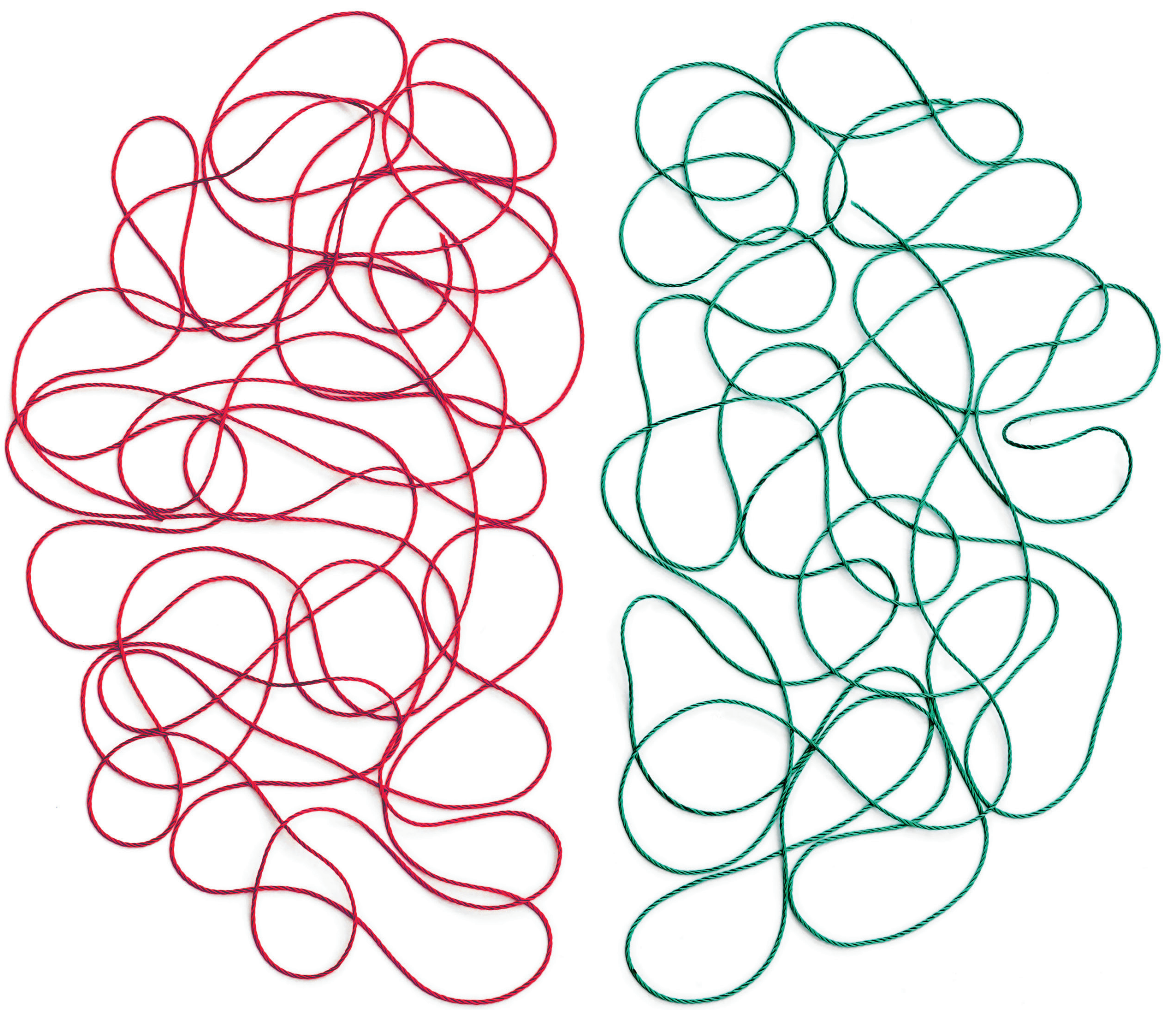
Available Options

1) Mental Health Support & Response

2) Mental Health Support & Response: For Leaders

Please contact your Customer Success Manager or Sales Executive if you would like to schedule a course or consultation.

- **Culturally relevant facilitation based on specific workplace needs**
- **Certificate of completion and course takeaways provided**



Employee and Leadership Training Descriptions

We offer a diverse range of courses, designed to effectively engage attendees. Our developed network of qualified facilitators are dedicated to your organizational training goals.

Please allow three to four weeks' notice for scheduling.

General Topics

Avoiding Job Burnout

In this seminar participants will learn the potential causes of job burnout and how to reduce their chances for burnout by better managing internal and external boundaries. Participants will also learn how to recognize the warning signs and assess their level of job stress and burnout.

Conquering the Winter Blues

This seminar defines both "winterblues," and "seasonal affective disorder," and how to tell the difference. Participants will learn how the winter season affects them and strategies for coping with winter blues.

Diversity: Equity & Inclusion

This seminar focuses on strategies to foster a more inclusive workplace for every employee and discusses individual and company-wide skills to implement these changes. Topics include recognizing the difference between equity and equality and using safe language.

Employee Orientation

The presentation will explain the EAP benefits available to the employee and their eligible dependents. It will explore the types of issues that would lead someone to utilize their benefit, ways to contact the Employee Assistance Program, and how the EAP can help.

Intro to Emotional Intelligence

This workshop will define emotional intelligence and discuss the importance of managing emotions in the workplace. We'll explore how to better define, cope with, and communicate our emotions to help create more balanced lives.

Resilience & Mental Flexibility

Resilience is a word we often hear but it can be difficult to define. This seminar focuses on understanding how it is defined and what skills can be learned to improve it. One of those is mental flexibility which involves being able to see different perspectives of a situation and adapt to new information. These skills can help in work and in life.

Suicide Prevention in the Workplace

This training equips people in everyday situations to observe and intervene when someone is struggling. Participants learn common warning signs, practice holding supportive conversations, implement a variety of proven support tools, and gain confidence in navigating the emotions that we commonly face when supporting people who are struggling with suicidal ideation.

Communication

Conflict Resolution

A conflict can occur when individuals have mutually exclusive goals and are unwilling to move from their respective positions. This training will identify components required to resolve conflict, including active listening and the ability to articulate one's position. Using creativity when exploring possible solutions will be discussed as a strategy to successfully resolve conflict.

Customer Service

Promoting and educating employees about customer service can lead to outstanding word-of-mouth advertisement, existing customer retention and loyalty, new business referrals, and cooperative, appreciative, productive employees. Information will be provided on how to identify customers, events that lead to poor customer service, techniques for dealing with and working with “difficult” customers, and fundamental concepts for providing great customer service.

Interpersonal Effectiveness

This seminar will explore how everything we do is a form of communication, including not communicating. We will discuss the following important components of communication skills: active listening, assertiveness, boundaries, self-awareness and locus of control.

Plain Language & Digital Communication

We communicate at work through digital mediums every day, and in some cases more than in-person. Learning appropriate etiquette and skills to communicate effectively via email and social media is critical for workplace efficiency, clarity and respect. This seminar will focus on concrete strategies to improve this.

Stress/Change

Compassion Fatigue

Compassion fatigue happens when you care about other people who have been experiencing significant challenges, and you feel or responsible for helping. Over time this process can lead to changes in emotional, intellectual, physical, and spiritual well-being. This training explores what compassion fatigue is, who may be at risk, identifying signs of compassion fatigue and developing new ways to cope.

Holiday Stress

Holidays can often become a more stressful than pleasant time. Learn about your stressors and discover how to lower your stress level for a better holiday.

Maintaining a Professional Workplace During Uncertain Times

As we all navigate the constant stress and anxiety of the pandemic, it can impact team morale and social safety. This webinar will focus on emotional coping skills and communication strategies to improve team cohesion and empathy during these times of distress and uncertainty.

Managing Emotions Related to Workplace Reintegration

As we all navigate these uncertain times during COVID-19, many of us are approaching the phase of re-entering the workforce which can cause added stress and anxiety related to concerns about safety, job roles, etc. This webinar focuses on emotional and logistical coping skills to help reduce the stress of this transition.

Managing Stress and Anxiety During Uncertain Times

The ongoing global news coverage of Coronavirus (COVID-19), paired with fear of serious illness, and constant change within our personal and professional lives can be anxiety producing. This webinar will review steps you can take during these uncertain times including:

- **Managing your stress response and practical strategies for healthy coping**
- **Tools to maintain a positive outlook**
- **Learning what resources are available for support**

Mindfulness Based Stress Reduction & Self Compassion

Mindfulness Based Stress Reduction is an evidenced-based intervention that helps with numerous symptoms, including depression and anxiety. This seminar discussed some core MBSR skills to use for self-care and how self-compassion factors into effectively taking care of ourselves.

Stress Management

Managing all of the different stressors in life is a challenge. People are becoming increasingly aware of the importance of reducing their stress because of the effects it creates on physical health, emotional well-being, and work productivity. These effects of stress as well as techniques to reduce stress will be discussed.

Time-Management

This presentation will discuss and explore basic time-management strategies. Participants will learn to manage themselves and their time in a more efficient manner. The presenter will explore time-saving strategies and identify areas where individuals waste precious time.

Working in a Changing Environment

In an organizational culture of constant change, adapting can be challenging. Some areas addressed during this presentation are the elements of change, different loss experienced related to change, the transitional stages, and ways of coping with stress and change.

Resources for Life

Coping Strategies for Caregivers

Caregivers face multiple stressors. This seminar will discuss common caregiver struggles, review ideas on self-care for caregivers, provide tips for difficult conversations with loved ones, and describe services and resources available through Canopy EAP.

Raising an Emotionally Intelligent Child

Raising an emotionally intelligent child can be a challenge. Learn what your parenting style is, what to look for, how best to encourage and support your child's development, and what resources are available.

Work/Life Balance

In today's busy society, balancing work and life is a common challenge. The stress this creates can be detrimental to an individual's physical health, emotional well-being, and work productivity. These effects will be discussed as well as strategies and techniques to reduce this stress.

Career Development

Maximizing Your Vocational Potential

Being happy and fulfilled in our work is a social, emotional and mental process. This seminar explores ways to improve self-awareness to connect to our values so we can be more engaged, empowered employees.

Resumes/Interviewing

Selling yourself on a job is key and a resume is a tool to getting your foot in the door. Learn how to present yourself on paper in a compelling and effective manner. Also, learn basic skills for interviewing with confidence and clarity. Identifying personal strengths and informational interviewing will also be addressed.

Wellness

Digital Detachment

The average American spends more than half of their waking lives staring at a screen. This type of technology fixation has been linked to a number of negative health effects. In this program we will discuss how technology is negatively affecting our mental and physical health, as well as our relationships. We will provide tips and resources to help address a digital detachment practice, to assist with a healthy lifestyle.

Eating for Mind and Body Health

Our food choices determine numerous aspects of our health. This seminar will cover why nutrient-dense food so important, what foods to include as part of a healthy lifestyle, behavior change to support motivate and maintain a healthy diet.

Healthy Heart, Healthy Mind

Our minds and bodies do not work independent of each other, and we need to stop thinking of these aspects of our health as separate entities. Recent studies show poor mental health is a risk factor for chronic physical conditions, and heart health is at the top of that list. In this program you will learn why anxiety and depression contribute to heart health risk factors, along with learning how to assess your mental stressors, and best practices to keep your mind sharp and your heart strong.

Healthy Sleep

This training addresses how stress impacts sleep along with key principles for getting better rest, including mindfulness and guided imagery. Insomnia, and its impact are also addressed.

Tobacco Cessation

This seminar provides an overview of the resources available to anyone thinking of quitting or who have a loved one who is thinking of quitting. Learn about identifying triggers, managing cravings, stress management and how to get support for quitting.

Wellness at Work

A healthy lifestyle has never been more important. However, due to long work days, complex workplace environments, competing obligations, and high stress, it can be difficult to achieve wellness goals. This presentation will focus on ways to incorporate wellness into different types of workplace environments, and will review why wellness during the workday is so important. Tips will be provided to increase motivation and attainment of wellness goals.

Whole Body Health

This seminar will focus on Nutrition, Movement, and Mindfulness. Whole body health is the acknowledgment of the physical, mental, emotional, and social components in life which assist with increased fulfillment. Proactively addressing each of these components can increase resilience, and positively impact your health and well-being.

Substance Misuse

DOT Employee Training*

This training is designed for DOT "covered employees" as defined by the Department of Transportation - those working in a "safety sensitive position" and requiring a Commercial Driver's License. The training is tailored to the company's alcohol and drug policy and the DOT rules and regulations and covers information about policy, alcohol and illegal drugs, including effects on the individual, safety, and work performance. Employees are reminded about the availability of the EAP and other resources for those who seek assistance.

Drug and Alcohol Awareness

Substance use in the workplace is more prevalent than most people think, but it continues to be a stigmatized and misunderstood issue. This training will provide education about how substance use impacts the workplace, basic drug& alcohol information, and how to support those who might be struggling

For Supervisors/Managers

DOT Supervisor Training*

This training is designed for managers, supervisors or others who are in a position to identify a "covered" employee who may be in violation of Department of Transportation (DOT) alcohol and/or drug rules and/ or company policy. A "covered employee" is defined by DOT as working in a "safety sensitive position" and requiring a Commercial Driver's License. The training is tailored to the company's alcohol and drug policy and the DOT regulations. The training covers the following: alcohol and drug information, including effects on the individual, safety, and work performance; signs and symptoms of current use, types of drug testing, supervisory responsibility, and specifically, how to respond to an employee after an accident and when there is reasonable suspicion for testing.

Managing Employees During Downsizing and Job Loss

Job loss can be something you have no control over. This seminar will review how loss impacts both employees and managers. Participants will gain skills and tools to navigate downsizing job loss with employees, in addition to tools about your own next steps.

Manager's Guide to Compassion Fatigue

This session is designed to help managers recognize signs and symptoms of burnout and compassion fatigue in their employees. Learning early interventions and proactive self-care will be discussed, as well as interventions for those already experiencing it.

Mental Health in the Workplace: A Manager's Role

This session is designed to increase awareness about mental health in the workplace and how to decrease stigma associated with getting help. Signs and symptoms of mental health, impact on the workplace, and first steps for getting well are provided. The role of a manager in establishing a supportive culture, early identification, encouraging employees to seek help and respectful treatment when returning to work will also be covered.

Reasonable Suspicion Training

This training is designed for managers, supervisors or others who are in a position to identify a covered employee who may be in violation of the company's substance abuse policy. The training covers alcohol and drug information, including effects on the individual, safety, and work performance, signs and symptoms of current use and specifically, how to respond to an employee after an accident and when there is reasonable suspicion to believe a new employee is in violation of the policy.

Supervisor/Manager Orientation

Since supervisors are generally the first to identify and intervene with a troubled employee, we want supervisors and managers to be familiar with the variety of EAP services. This seminar explains the EAP benefit and gives specific tools to help identify and address performance issues.

Supporting Employees During Workplace Reintegration

As states and organizations begin reopening this can create stress and anxiety for employees re-entering the workforce. Managers are in a unique position of having to support employees during this transition while also practicing their own self care. This webinar provides strategies on how to best support employees during reintegration and what other EAP resources are available.

> **"Very useful!! Canopy helped, with my stress and found solutions to various problems I was struggling with."**

Organizational Development*

Mental Health Support & Response

This course provides the foundation of Mental Health Support & Response training. It also provides in-depth education on how to support an individual experiencing a mental health crisis and how mental health issues present in the workplace. Participants will learn how to approach the topics of mental health and substance use in the workplace, the impact on work, and how we can create safer work environments for all employees. The course concludes with a review of how to take care of oneself when supporting others as well as the resources available to support mental health. The standard length of this session is 8 hours.

Customized trainings available. Please contact us if you do not see something that fits your needs.

Mental Health Support & Response: For Leaders

This module is designed for leaders in the workplace. It includes the foundation of Mental Health Support & Response. In addition, participants will explore their role as leaders in their workplace as it pertains to mental health as well as how leadership can shape and shift company culture. Topics discussed include: How to have the conversation with an employee you are concerned for, how to care for yourself in your role and how you can make an impact in your workplace as a leader. The standard length of this session is 8 hours.

Financial Education Seminar Descriptions

Financial classes are provided in partnership with Balance

30 Ways to Trim Your Budget

Stretching your budget is a necessary step to achieving your financial goals. Learn smart ways to save on the things that impact your finances most, such as food, health care, insurance and more.

After Identity Theft

If you're a victim of identity theft or just want to stay prepared, this workshop is a must. You'll learn about the different types of identity theft as well as proven steps you can take to minimize its impact.

Are You Financially Healthy?

In this workshop you will understand what it means to be financially healthy - which is so much more than the one score everyone asks you about today – your credit score. True financial health is based on four key components: Spend, Save, Borrow, and Plan. You'll also get a chance to confidentially determine your own Financial Health Score and the steps you can take to improve that score.

Basics of Personal Finance

From managing daily expenses to investing for retirement, this session helps participants set personal finance goals, learn the basics of smart money management, and build a solid financial foundation for the future.

Becoming a Homeowner

Homeownership starts well before the contracts are signed. Preparation is one of the keys to a smooth home buying process. This session covers all major pre-purchase topics such as budgeting, the down payment, credit reports, debt-to-income ratios, and the mortgage lending process.

Breezing Through the Holidays

It may be called "the most wonderful time of the year" but December can also be filled with unwanted debt with holiday spending. Learn budgeting strategies and tactics to avoid that year-end credit card crunch and sidestep debt traps in the future.

Checking 101

A checking account is a foundational personal finance tool—when used correctly. Learn the ins and outs of managing an account, such as keeping track of checks, monitoring statements, and account balancing.

College Financing 101

As the cost of college tuition continues to rise, parents wonder how they can afford to pay for higher education for children or themselves. Participants will learn about long-term savings strategies, financial aid opportunities, and other ways they can make college education a reality.

Credit Card Makeover: Getting Out of Debt

Credit cards can be a great financial tool, but for some, can lead to debt and financial trouble. This session provides an overview of credit card usage, warning signs of credit issues, and options for debt management and reconstructing existing credit.

Digital Financial Services

Technology has made managing your money much more convenient. Whether it's opening and managing accounts, transferring money or bill pay, you'll learn the fundamentals of electronic banking.

30 Ways to Trim Your Budget

Stretching your budget is a necessary step to achieving your financial goals. Learn smart ways to save on the things that impact your finances most, such as food, health care, insurance and more.

After Identity Theft

If you're a victim of identity theft or just want to stay prepared, this workshop is a must. You'll learn about the different types of identity theft as well as proven steps you can take to minimize its impact.

Are You Financially Healthy?

In this workshop you will understand what it means to be financially healthy – which is so much more than the one score everyone asks you about today –your credit score. True financial health is based on four key components: Spend, Save, Borrow, and Plan. You'll also get a chance to confidentially determine your own Financial Health Score and the steps you can take to improve that score.

Basics of Personal Finance

From managing daily expenses to investing for retirement, this session helps participants set personal finance goals, learn the basics of smart money management, and build a solid financial foundation for the future.

Becoming a Homeowner

Homeownership starts well before the contracts are signed—preparation is one of the keys to a smooth home buying process. This session covers all major pre-purchase topics such as budgeting, the down payment, credit reports, debt-to-income ratios, and the mortgage lending process.

Breezing Through the Holidays

It may be called "the most wonderful time of the year" but December can also be filled with unwanted debt with holiday spending. Learn budgeting strategies and tactics to avoid that year-end credit card crunch and sidestep debt traps in the future.

Checking 101

A checking account is a foundational personal finance tool—when used correctly. Learn the ins and outs of managing an account, such as keeping track of checks, monitoring statements, and account balancing.

College Financing 101

As the cost of college tuition continues to rise, parents wonder how they can afford to pay for higher education for children or themselves. Participants will learn about long-term savings strategies, financial aid opportunities, and other ways they can make college education a reality.

Credit Card Makeover: Getting Out of Debt

Credit cards can be a great financial tool, but for some, can lead to debt and financial trouble. This session provides an overview of credit card usage, warning signs of credit issues, and options for debt management and reconstructing existing credit.

Digital Financial Services

Technology has made managing your money much more convenient. Whether it's opening and managing accounts, transferring money or bill pay, you'll learn the fundamentals of electronic banking.

Drive Away Happy: Car Buying Decisions

Getting a car can be overwhelming and stressful with all the decisions to make: new or used; buy or lease; zero percent financing or rebate (not to mention what color to pick). Participants will learn tips and tricks to have the best car shopping experience possible, while also making wise financing decisions.

FAFSA: The Key to Unlocking Financial Aid

The Free Application for Federal Student

Aid (FAFSA) is a government form that streamlines the financial aid process, which can help reduce your student loan burden. This workshop covers FAFSA basics, as well as provides insight into the application process, how to complete the FAFSA online, federal requirements, and receiving and maintaining federal financial aid.

Federal vs. Private Student Loans

This workshop explains key differences between federal and private student loans, and compares eligibility, interest rates, repayment plans and more. Participants will learn how to choose the option that best suits their needs.

Finances for New Families

Getting married. Having kids. These are natural progressions in life for many, but also present new financial situations and decisions to make immediately, and for the long term. This session will help you discover, prioritize, and design a workable plan for your family's goals and lifestyle.

Finances for Small Business Owners

Entrepreneurship is stronger than ever. This session covers all the financial aspects of starting and running a small business. Topics include: types of legal entity structures, writing a business plan, bookkeeping, paying taxes, and everything in-between.

Financial First Aid

A financial crisis can throw even the best money management plan into chaos. This session focuses on ways to gain control of a crisis. Participants will learn about financial assessments, expense prioritization, and effective negotiation with creditors.

Financially Savvy Seniors

Retirement can be a great time for seniors if they are prepared financially. Attendees will learn about specific retirement concerns such as managing money, Medicare, Social Security, improving cash flow, insurance, investing, estate planning, and more.

Identity Theft Solutions

Identity theft is becoming more common and sophisticated than ever. Session participants will learn the methods that identity thieves use to access confidential information, tools for preventing ID theft, and steps to take should identity theft occur.

Investing in Real Estate

Investing in real estate can be a great way to boost income—if done wisely. To help investors turn a profit, we'll cover the pros and cons of different properties, resources for finding investment opportunities, and financing options.

Medicare: How it Works

For many, Medicare is a lifeline for receiving the medical services needed. To make the most of this federal health insurance program, it's important to understand how Medicare works Topics in this workshop include eligibility and enrollment, terminology, premiums and deductibles, coverage types, and additional resources.

On the Road to Riches:

The Basics of Saving and Investing
Investing is one of the smartest things consumers can do to secure a brighter financial future. Every investor has different goals, risk tolerance, and cash flow, which will impact savings and investment choices. Participants will learn about savings strategies and tactics, investment tools, and how to develop an investment portfolio that works with their lifestyle and budget.

Personal Finance for College Students

College education is a prime time for young adults to learn about finances and plan for their future. Attendees will learn about credit (how to use it wisely), tools to develop a positive credit history and score, create and manage their own budget, ways to track spending, and options for student loan repayment.

Planning for Money Milestones

There are many important financial milestones for consumers in their 20s and 30s. To help prepare today's "Millennials" for a positive financial future -

without sacrificing fun - we take a realistic approach to managing finances. We'll cover SMART goals, getting financially organized, building a budget, controlling expenses, wiping out debt, and much more!

Psychology of Spending

We all have a "money personality" and it has a major impact on our attitudes, relationship with money, and spending habits. By understanding this, individuals can monitor and adjust their behaviors to make smart money decisions. This session will teach strategies and tactics to decode personality types to gain control over finances.

Raising a Money-Smart Kid

Earning money, spending and saving are important lessons children learn very early on in life. This session will help guide parents on effective ways to educate children about financial responsibility that can last a lifetime.

Rebuilding After a Financial Crisis

A job loss, a medical crisis, or other hardship can send a normal financial situation into a tailspin. Participants will learn how to get their finances back on track, including budgeting, repaying debt, rebuilding credit, establishing emergency savings, and replenishing retirement savings.

Repaying Student Loans

Student loans can put a heavy burden on monthly finances, sometimes rivaling the cost of a mortgage. These days there are many options to help repay these loans. This session will teach attendees about the choices available.

Retirement Planning Later in Life

It's one of the most important financial considerations for anyone today. And as you get closer to retiring, it becomes more critical to have a solid plan of action. This workshop focuses on deciding when to retire, investment options, estate planning, Social Security benefits, and healthcare considerations.

Retirement Planning: The Basics

Retirement is something most people look forward to, but may not have planned well in advance. Participants will learn how to harness the power of time, optimize investments to reach their long-term goals, and understand how the economy and taxes can impact their retirement dollars.

Safeguarding Kids' Identity and Online Privacy

Today's youth generation is tech-savvy and connected online. However, parents still play an important role in helping them avoid online hazards such as identity theft, privacy and cyber-bullying. This workshop covers important issues including online privacy tips, managing computer settings, smartphone apps, and positive online behavior.

Saving With Purpose

Saving money is much easier with a goal in mind. This workshop shows you how to choose the right goals for you, and overcome barriers to achieving them.

Solving the Mystery Of Credit Reports

Credit report scores hold a lot of power—they can help buy that first home but can also take away financial opportunities. This session provides an overview of credit bureaus, credit scoring, guidance to dispute inaccuracies, improving credit scores, and dealing with identity theft and fraud.

Stock Market Basics

Many financial planners say it's wise to invest your savings in the stock market rather than leave your money in a low-interest account. Before you jump into the stock market, it's important to know that investing in stocks comes with risks. This workshop provides the basics needed to get a clear understanding of the stock market, the risks involved, ways to reduce risks, how to buy stocks, and how to maintain your account.

Teens and Money

Young adults are primed to soak in new information. It's a great time to guide them to money management techniques that can last a lifetime. Attendees will learn managing money effectively, preparing for common upcoming bills, opening checking and savings accounts, establishing credit (and use it wisely), and looking at investing options.

Ten Steps to Financial Success

We all measure financial success differently, but all paths to get there require discipline and goals. This session teaches participants ways to financial control— including developing a spending plan, creating objectives, weighing insurance needs, and other tools that will help get on the road to personal financial success.

The Sandwich Generation

The Sandwich Generation is positioned in the middle. They care for aging parents while supporting their own children. In this workshop, participants will learn how to manage their parents' medical, legal and financial needs, while ensuring they stay financially prepared for their kids' future.

Understanding Credit

Credit: Many want it but how do you get it? This session covers all aspects of becoming an educated credit consumer, including how lenders evaluate for credit approval, factors that impact credit qualification, how credit scoring works, and ways money management today impacts credit standing tomorrow.

Using Credit Cards Wisely

A credit card can be a valuable financial tool. However, before racking up big charges on multiple cards, participants should learn smart ways to handle their credit cards and take a disciplined approach.

Using Home Equity

There are numerous benefits to owning your own home. Not only does it provide you with a place to live, but you can also often use the accumulated equity for many money-smart purposes. Borrowing further against your home is a serious financial decision and should only be done after careful research and consideration. This session will discuss the pros and cons of borrowing against your equity and also review the different ways you can do so.

Women and Money

Whether it's having children, career advancement, divorcing, or becoming a widow, there are certain pivotal times in women's lives that can occur. This session addresses special considerations for budgeting, credit, and insurance.

Your Credit Score

One of the most important numbers consumers have is their credit score: it affects the ability to purchase a home, buy a car, get a credit card, and other financial decisions—but it can also hinder them. This session reviews types of credit scoring models currently used including FICO, Vantage, non-traditional, and bankruptcy risk.

Your Guide to 529 College Savings Plans

For families and individuals looking for ways to save for college, 529 College Savings Plans provide a flexible way to prepare for the future—and with valuable tax-advantages. Learn about available options, plan limitations and restrictions, and the financial impact on student aid.

"Canopy's series of Financial Education Seminars are easy to understand and very informtive"

Legal and Identity Theft Class Descriptions

Education provided in partnership with CLC

Experienced legal professionals are available nationwide to present various classes covering legal topics and planning principles. All classes have state-specific content.

Estate Planning 101

Estate planning is the process of preparing for end-of-life concerns and taking control of your legacy. Think about family, bank accounts, houses, stock portfolios, cherished possessions – and what will happen to them. The process can be complex and expensive. In this class, we discuss the necessary steps to create an estate plan, while offering attendees discounted access to personalized wills and trusts.

Planning For Future Medical Decisions

By human nature, we tend to delay end-of-life decisions until it's too late. Whether personal end-of-life decisions or a loved one's, it's important to make smart end-of-life decisions that ensure a peaceful transition. In this class, we discuss the strategies for effective family communication, and the benefits of advance directives/power of attorney.

Caring For the Elderly and Disabled

With a loved one who has any mental or physical condition limiting movement, senses, cognition or activities, we're often so focused on what we can do to help, that we need a reminder of what services are already legally available. In this class, our presenter will review the tools and programs that assist older/disabled family members, and how to best set-up loved ones for success.

ID Theft Protection 101

Every two seconds someone becomes a victim of identity theft. Knowing how to protect our identities and who to contact when victimized can seem difficult and time-consuming, but we're here to show the easy-to-follow steps. In this class, our Fraud Resolution Specialist at the curtain to reveal how fraudsters steal data and lure consumers. We'll also share tips on building the first line of defense against identity theft.

Avoiding Tax Filing Fraud

W-2 documents, DOB and a Social Security number -- tax filing can expose a substantial amount of personal information. During tax season, data thieves are looking to intercept tax refunds, and sell personally identifiable information (PII) on the dark web. In this class, we discuss the warning signs to recognize tax-related identity theft and the necessary steps to help prevent fraud.

Avoiding Holiday Shopping Fraud

Huge sales, must-have gifts, and rushing for last minute items. When shopping between stores, we're often so focused on the activities of the holiday season that we can easily be distracted from financial and identity exposure. In this class, we discuss the fraudster targeted information, common fraudster tactics, best safety practices, and next steps when victimized.

Battling Unemployment Fraud

As a ramification of COVID-19, both employers and employees have struggled with falsified unemployment benefits, such as notifications of awarded benefits, payment details, or ATM cards. In this class, our Fraud Resolution Specialists will address the significance unemployment fraud and provide the preventative steps necessary to minimize the risk of further damage.

Data Breach Education

A company data breach can take a toll on both the infrastructure and employee body. In this class, we discuss company data breach life cycles and the cost to its victims. We'll also share our preventative steps that employees and companies can take to reduce the chance of a breach.

HR Webinars

Canopy EAP introduces our 2023 Webinar Series for Human Resource Professionals

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Each webinar is free and approved for one (1) SHRM credit.

Leveraging Workplace Engagement: How HR Professionals Can Motivate Employees in the Age of "Quiet Quitting"

presented by: Caitlin Plato

February 21, 2023, 9:00 AM (PST) REGISTER HERE

The pandemic has impacted many people's relationship to work. This webinar will focus on how HR professionals can better support employees and establish more concrete analytics on measuring engagement.

Organizational Strategies HR Can Utilize to Improve Psychological Safety in the Workplace

presented by: Jackie Moore

May 10, 2023, 9:00 AM (PDT) REGISTER HERE

Psychological safety is a primary driver of employee engagement and retention. This webinar will focus on measurable organizational interventions via the principles of trauma-informed care that HR professionals can use to ensure all staff feel emotionally and socially safe.

Diversity, Equity and Inclusion Awareness for HR Professionals

presented by: Caitlin Plato

August 16, 2023, 10:00 AM (PDT) REGISTER HERE

This webinar will focus on strategies to help HR foster a more inclusive workplace for every employee. Topics discussed will include safe and respectful language, skills for becoming a better ally, tips for facilitating conversations with employees on diversity related issues, and strategies for implementing individual and company-wide changes.

Substance Misuse & the Workplace: How HR professionals Can Support Employees

presented by: Katie Zaugg

November 6, 2023, 11:00 AM (PST) REGISTER HERE

This webinar will focus on drug and alcohol education, as well as stigma reduction, community resources and how to establish a supportive environment in the workplace as an HR professional.

View the HR Webinar Series on our website here

Monthly Member Webinars

January

The Struggle Is Real: Strategies for Time Management

Meet your deadlines, be on time for meetings and stop procrastinating! Most of us can become overwhelmed when we have a lot to do - responsibilities at work, planning our kid's birthday party, and remembering all the details of daily life. This webinar will discuss realistic strategies for more effective time management. Some of the things we'll review are: managing email clutter, the roots of procrastination, and keeping yourself motivated.

February

Navigating Red Tape After the Death of a Loved One

The passing of a loved one is already traumatic for those left behind. However, learning the basics of dealing with the administrative side of death can make the journey a lot easier. In this webinar, you will learn the first steps needed to get through the standard paperwork, dealing with banks and funeral homes, filing the death certificate, and other key aspects of handling your loved one's estate.

March

The Sandwich Generation: Multi-Generational Caregiving

Are you taking care of your children and your parents? Many middle-aged people find themselves stuck caring for both ends of the age spectrum - helping both their children and their parents navigate finances, social lives and changes incapacity for independence. This kind of caretaking can cause burnout and exhaustion. This webinar will review the phenomenon of the sandwich generation and how we can better manage the needs of our changing families. We'll discuss ways to have productive conversations with aging parents about their needs, ways to troubleshoot burn out as a caregiver and how to keep your own family running smoothly.

April

Making Time for Everything: Dual Careers and Family Life

Two busy partners can make for a stressful household. Managing the unromantic tasks of daily life and household management can be difficult. Making time for the things that really matter - connecting, having fun, playing and resting – can be quite challenging. In this webinar, we will discuss ways to better manage your household and make time for what matters most. We will discuss the realities of busy, working partners and making the most of the time and energy we have.

May

The Science of Happiness

Learn how to bring more happiness to your personal and professional life. Research supports that happy people feel better, do better, and live better. While this is great news, it still begs the question, why? And more importantly, how? During this webinar, we will explore the history and research behind this concept of happiness, how it relates to the various facets of your life, and what intentional activities you can do to increase your life satisfaction and fulfillment. There are many pathways to happiness, so let's get your journey started!

June

PTSD: Let's Get the Facts

You've heard about it. What is it, what are its causes, and how is it treated? This webinar will explore and discuss Post Traumatic Stress Syndrome. We will discuss the definition, common myths vs. facts, symptoms, relationship, self-care, and treatment.

July

Planning for Retirement: It's More Than Just the Numbers

The advertising you see about retirement all seem to emphasize money. While money is very important, it's not the only thing. Join us for a broad look at what you can do now for a satisfying retirement. We'll explore the new world of semi-retirement, emotional issues around leaving work, the money of course, and more.

August

Engaging Empathy in the Workplace

Often a sad employee is perceived to be a bad employee, yet everyone will suffer a setback at some point in their career due to a change in personal or family health, the death of a loved one, a financial loss, or a change in family caregiving. To show empathy and support, coworkers must try to understand the feelings of the person who is experiencing a setback. This can be accomplished through training, listening, connecting, and providing kindness to one another. This webinar will provide a greater understanding of best practices in providing empathy to coworkers and managers while maintaining a professional relationship.

September

Involvement and Engagement

Learn how small acts of kindness and a state of flow can change your life. Do you ever ask yourself, "What can I do today to change my life for the better?" Thankfully, research supports that there is something we can do about it, and it's quite easy. In this webinar, we will explore two actionable concepts, acts of kindness and flow, that you will enjoy adding to your daily/weekly routine and that will help you live a happier, positive, purposeful life!

October

Master Your Spending

This webinar teaches you to master the emotional side of money and regain their financial dignity. Topics discussed include: Why traditional budgets fail and what you need instead, the two key things you need to do BEFORE making a plan, to have productive money discussions with your significant other, keys to outsmart emotional spending before it happens, how to create a personalized plan that works for YOU. The webinar will provide a Spending Plan worksheet to apply the principles learned to your finances immediately. This workshop will help you become and stay financially healthy.

November

Supporting a Loved One with Substance Misuse

Having a loved one with addiction can be heartbreaking, frustrating, and terrifying. Choosing how to support them can be confusing - the right choice is not always obvious. In this webinar, we will discuss recognizing signs of addiction and review choices of how to support your loved one. We will also review concepts such as enabling and codependency. You will walk away from this webinar with a clearer idea of how to support both yourself and your loved one.

December

Relaxation Rx

Most of us feel too busy to even think about taking time out to relax. But the reality is that regular relaxation is crucial. If we don't stop regularly to "refuel," we risk emotional and physical burnout. Even a small investment of 5-10 minutes a day can have a huge return. This webinar will include demonstrations of relaxation techniques that provide immediate as well as long-term benefits. We'll also learn how to detect burnout "triggers" and discover ways to regain a sense of balance and motivation. You will leave feeling recharged and better able to tackle daily demands.

Content is updated regularly. Access full webinar schedule for Monthly Member webinars canopy

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