



Westside's Staff Wellness Reimbursement Program

(Winter 2023 Implementation)



Objective: To assist and support all of our Westside team members in maintaining a healthy lifestyle, the district will reimburse each permanent employee up to \$125 per school year for eligible services and activities directly related to health & well-being.

Who's eligible?

- Permanent Westside employees
 - Permanent employees include employees who work a regularly scheduled assignment, and does not include substitutes or “on-call” employees.
- Eligible permanent employees do not need to be on the Westside Health Insurance Plan to qualify for this new benefit offering.

How will the benefit be calculated and dispersed?

- The wellness reimbursement will be prorated based on each permanent staff member's assigned hours/week (full time equivalence) - example: All EAs who work 30 hours a week will receive 75% of the \$125 benefit, because the employee works 75% of a full 40 hour week. The HR and Payroll offices will utilize the FTE information on file in EAC.
- The wellness reimbursement amount will be reimbursed via the payroll process.
 - To be reimbursed, the staff member must be employed by Westside when the eligible expense(s) is incurred and reimbursement is requested.
 - New employees, regardless of hire date, are eligible to receive the full annual wellness reimbursement amount (based on FTE), if submitted prior to the deadline of July 1st of each school year.

Benefit Year and Benefit Amount:

Eligible employees can be reimbursed up to \$125 per school year (July 1 - June 30).

- For this year (2022-2023), employee purchases made after January 1, 2023 and before June 30, 2023 will be eligible for reimbursement.
- The 2023-2024 reimbursement year begins on July 1, 2023.
- The wellness reimbursement amount will be reimbursed via the payroll process and for that reason it will be considered taxable income.
 - Because this is taxable income, the district set the full-time amount at \$125, so the after-tax (take home) amount would be as close to \$100 as possible for full-time employees.**
- The wellness reimbursement benefit does not roll over to the following year. Any amount not used by the end of the year is forfeited.

How to claim your reimbursement:

1. Make an eligible purchase(s).
2. Complete the [Wellness Reimbursement Form](#)
 - a. Submit ONE form for reimbursement
 - i. **Only one form per employee, per reimbursement year will be accepted / processed**
3. Send the completed form, along with all corresponding receipts, to HR
 - a. Can deliver in person, send through the Pony, or email to HRDept@Westside66.net
 - b. Submit all receipts eligible for reimbursement
 4. An HR representative will review your completed form for eligibility.
 5. If accurately submitted and eligible, payroll will process the reimbursement on the following monthly payroll.

Important notes

- Receipt or proof of payment must show the date the eligible wellness activity or product was purchased. (Handwritten receipts or receipts for cash payments are not acceptable.)
- If the qualifying item costs more than the reimbursement amount, submit the receipt and request reimbursement up to the allowed amount mentioned above.
- Reimbursement requests must be received by June 30th of each year.

See backside of this document for allowable reimbursement expenditures.

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For guidance, review the following list of examples of reimbursement-eligible items:

(This list is not exhaustive, so if an item or service is not specifically mentioned below, call HR and a determination can be made as to if it is an eligible item.)

- Memberships: Gym memberships, initiation fees, registration fees, health center fees, bike share fees, tennis club fees, swim clubs fees, rock climbing fees, ski lift tickets, skate park fees, life coach fees, etc.
- Fitness trackers: Apple iWatch, Fitbit, Jawbone, Garmin vívofit, Oura ring, or similar wearables; health apps
- Exercise/wellness Equipment: Shoes (for any sport), treadmill, snowboard, skis, bicycle, tennis racket, golf clubs, yoga mat, helmet, skates, hula hoop; equipment for swimming, football, soccer, baseball, etc. This does not include clothing or attire.
- Formal Lessons or personal training: Life coach, Pilates, golf, swimming, tennis, dance, personal training fees, etc.
- Classes: Yoga, aerobics, Zumba, Pilates, spin, martial arts, meditation, kickboxing, dance, nutritional or dietitian classes from wellness experts, weight management, JumpstartMD, karate, tae kwon do, music, archery, boxing, cricket, CrossFit, horseback riding, ice skating, skating passes, mental wellness classes (art of living, etc.), and other similar fitness classes
- Exercise technology: Videos, subscriptions, games, and apps: Wii Fit, Peloton, health apps, or similar
- Personal wellness services: Wellness massage services, personal training, nutrition counseling, meal planning services (but no food or supplement purchases)

Examples of items that are not reimbursement-eligible:

- Health spa treatments and products other than for wellness massage; Cell phone, tablet, iPad, ThinkPad; Vitamins and supplements; Medical services (e.g. PT or OT), supplies, or equipment; Exercise attire or sports attire (except fitness shoes), Video games not related to exercise or health (e.g., PlayStation, PS3, Xbox, Kinect, or other video game console systems); Furniture and home appliances; Physiotherapy and chiropractors; Headphones, AirPods, Bluetooth headsets; Payments made directly to an individual - payments must be through an entity that can produce a receipt; payments through apps such as Venmo or G Pay are not eligible; Meals or snacks; Computer equipment.