



## Forge Health & KPC Wellness Reimbursement Program

As part of Forge and KPC's efforts towards employee wellness, we are thrilled to implement our new Wellness Reimbursement Program. To support you in this effort to help you maintain a well-rounded, healthy lifestyle, we will reimburse you up to \$150 per year for eligible items, services, activities that directly relate to your well-being. Don't get stuck in the same old routine. Try a new program on us!

### Who's Eligible?

You are eligible to participate in the program if you are a full-time employee of Forge Health or KPC. To be reimbursed, you must be employed by Forge or KPC when you incur the eligible expenses and when you request reimbursement.

New employees, regardless of hire date, are eligible to receive the full annual wellness reimbursement amount.

### Benefit amount

You can be reimbursed up to \$150 per calendar year. This amount is considered taxable income unless not required by local tax rules.

The wellness reimbursement benefit does not roll over to the following year. You forfeit any amount you do not use by the end of the year.

### What's covered?

Use your best judgment in determining what to submit through the wellness reimbursement program. First, ask yourself:

- Is this item, service, or activity, directly benefiting my well-being?
- Does this item assist me in relaxing, getting my heart rate up, staying on track with my health goals, or learning a new activity directly related to my well-being?

For more guidance, review the following lists of examples. Final discretionary approval for all eligible items is up to the Human Resources Department. Please contact Human Resources before purchase if you have any questions regarding the eligibility of your purchase.

### Examples of eligible items

This list is not exhaustive, so if an item, service, or activity you are interested in is not specifically mentioned, determine if it is similar to something on the list and/or ask HR for guidance.

- **Memberships:** Gym membership, initiation fees, registration fees, health center fees, bike share, tennis, swim clubs, rock climbing.
- **Fitness trackers:** Apple Watch, Fitbit, Jawbone, Garmin vívofit, or similar wearable; health apps
- **Equipment:** Shoes (for any sport), treadmill, snowboard, skis, bicycle, tennis racket, golf clubs, yoga mat, helmet, skates.
- **Lessons or personal training:** Pilates, golf, swimming, tennis, dance, personal training fees, music, art
- **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 services:** Massage, personal training, nutrition counseling, meal planning services (but not food purchases)

## Examples of items that are not eligible

This list is not exhaustive, so if an item, service, or activity you are interested in is not specifically mentioned, determine if it is similar to something on the list and/or ask HR for guidance.

- Currency exchange fees
- Health spa treatments and products other than massage
- Cell phone, tablet, iPad, ThinkPad
- Hydrostatic testing
- Vitamins and supplements
- Medical services, supplies, or equipment
- Exercise attire or sports attire (except fitness shoes)
- Sunglasses
- 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
- Purchases made on your corporate card (if applicable)
- Tutoring

## How to claim your reimbursement

Follow these steps to file an expense through Gusto.

1. Log in to your Gusto account.
2. Click **Expenses**
3. Click the **Green Plus Sign**
4. Select “Wellness Reimbursement Program” in the category drop down menu.
5. Complete all requested fields.



6. Upload your receipt—or proof of membership, if applicable—and click **Next**. Please remember, all receipts must be an itemized receipt from the vendor itself, and not from your bank account/credit card statement, per IRS regulations.
7. Click **Submit Expense**.

Once your expense is approved, you will receive an automated email from Gusto confirming your request. The Human Resources department will notify you if there are any issues with your request.

## Important notes

- Your receipt or proof of payment must show the date you paid and the eligible wellness activity or product.
- Handwritten receipts or receipts for cash payments are not acceptable.
- Items purchased outside your home country are eligible. Your receipt amount must be converted to local currency.
- If your qualifying item costs more than the reimbursement amount, you can submit your receipt and request reimbursement up to the allowed amount.
- If an item is canceled or returned after you receive reimbursement, the funds can be applied to another eligible wellness item, or you must return the funds to Forge Health or KPC, respectively.

## Reimbursement claim deadline

Claims should be filed by December 31 of the current calendar year. If you miss the deadline, there is a grace period and you may file for reimbursement of the prior year claims until March 31 of the current year (to count toward the prior year's balances). After March 31, claims for the prior year will no longer be accepted for reimbursement.