

# POLICY MANUAL



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| GENERAL ADMINISTRATION<br>(ALL DEPARTMENTS) | 120-7            | 1 of 2     |
| POLICY TITLE                                | DATE             | MOTION NO. |
| Wellness Account                            | July 13,<br>2016 | C16-126    |

## PURPOSE:

To establish a policy for the provision of funds for staff purchase of goods, services, memberships, etc. which encourages personal fitness and wellness which are not covered in their benefits package while also providing additional funds to cover medical expenses not fully covered within the existing plan.

### 1.0 Application

All permanent staff included in the Starland County benefits program are covered by this account. All claims submitted under the Wellness Account will be considered as taxable income.

### 2.0 Guidelines/Procedures

1. An annual allocation of \$500 per employee will be made available for reimbursement based on the calendar year of January 1<sup>st</sup> to December 31<sup>st</sup>.
2. Unused amounts will be forfeited at the end of the year.
3. Claims submitted through the Wellness Account program will be taxed. The amount claimed will be included in the taxable income reported on the employee's T4.
4. Claims submissions will be reviewed and approved/denied by the CAO or Assistant CAO in accordance with this policy.
5. Eligible and ineligible purchases:

#### Eligible Purchases

- Fitness center memberships (including family memberships), personal trainers, fitness consultation
- Classes/lessons/passes for swimming, skating, skiing, golfing, running, yoga, dance, martial arts, etc.
- Membership/league fees for sports such as hockey, softball, curling, golf, etc.
- Equipment/accessories for any physical activity or sport such as a tennis racquet, skates, hiking or running shoes, golf clubs, snowboard, skis, etc.
- Exercise equipment such as a treadmill, elliptical, stationary equipment, weights, exercise balls, etc.
- Nutritional programs and education



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- Nutritional supplements
- Other medical expenses not fully covered under the existing benefits plan such as eye glasses, acupuncture, massages and other para-medical services with dollar value caps listed in benefits plan.

#### Ineligible Purchases

- Hobby course/personal interest courses
  - Music, singing, drama classes
  - Cultural events, recreational events, symphony, sporting events
  - Spa visits
  - Camping equipment, fishing rods, hunting gear, motorized equipment
  - Computer hardware or software
6. The main intent of the Wellness Account is to benefit the Employee.
  7. Claims are to be made through the submission of a receipt to the Chief Administrative Officer.
  8. Clarification on eligible expenses for reimbursement prior to purchase should be directed to the CAO or Assistant CAO.
  9. Employees who are on leave and are not contributing to the Starland County benefit plan are not eligible for this program.

### **3.0 Funding**

In 1999, Mutual Life of Canada converted from a private insurance company to a corporation. The demutualization of Mutual Life of Canada resulted in the issuance of shares in a private company called Clarica Inc. By virtue of participating in an employee benefit program with Mutual Life, Starland County was issued shares in the new company. The County maintained their share holdings, and established a separate bank account for dividends and interest earned. It is anticipated that this account will fund 50% of the annual cost of the program with the final 50% being funded from general revenues.

#### **Amendments:**

1. September 14, 2016 (C16-154) – adding CAO for approvals, adding family memberships and removing restrictive clause in Section 6