



Operating Procedure

Occupational Health Unit

Title: Health Maintenance Reimbursement	Number: OHU-8.07	Page: 1 of 5
	Revision: 16	Effective Date: 04/05/23

1.0 Purpose

To establish guidelines for partial reimbursement of costs associated with approved health maintenance programs for Alyeska employees and loanees.

2.0 Accountable Resources

Occupational Health Unit (OHU): Alyeska's OHU Designee is accountable for approving all health maintenance programs, facilities, and activities, processing employee forms, submitting to payroll for employee reimbursement and for budgeting annually, as appropriate. The OHU Designee is also accountable for the administration and interpretation of this procedure.

Payroll: Alyeska's payroll group is accountable for processing employee reimbursements.

Employees: Alyeska employees are accountable for adhering to this procedure and submitting the appropriate forms and receipts for reimbursement.

3.0 Procedure

A. GENERAL

Alyeska encourages employees to establish and maintain participation in activities that increase their health, fitness, and well-being. Alyeska's Health Maintenance program is designed to support employees and loanees who participate in wellness facilities, programs, and/or activities.

B. ELIGIBILITY

To be eligible for health maintenance reimbursement the following criteria must be met:

1. Participants must be full-time employees or loanees. Interns and Part-Time employees are eligible at a reduced rate. Expenses for dependents are not eligible for reimbursement.
2. The facilities, programs, and/or activities must provide specific, health maintenance benefits (i.e., cardiovascular, respiratory, weight control, smoking cessation, etc.).
3. Where health maintenance programs require that participants obtain a physician's certificate of fitness, the responsibility, and cost(s) for obtaining such certification rests with the employee.
4. Participants must submit appropriate forms and receipts for reimbursement prior to his/her last day of employment using the Form 11009, Health Maintenance Reimbursement Form.



C. FINANCIAL ASSISTANCE

To encourage participation in approved health maintenance programs, facilities, and activities, Alyeska will provide financial assistance to employees and loanees.

1. Reimbursement

a. Amount

Alyeska will reimburse 50 percent (on a shared-cost basis) for a total annual reimbursement up to \$700 for full-time employees. Interns and part-time employees will be reimbursed 50 percent (on a shared cost basis) up to \$350 annually. The reimbursement will be included in the employee's taxable income.

b. Types

Reimbursement is limited to the eligible expenses listed below:

- Health club/gym membership
- Health tracking devices
- Group exercise classes, such as
 - Yoga
 - Cycling
 - Circuit training
 - Martial arts
 - Barre
- Exercise equipment, such as
 - Mountain/fat tire bicycle
 - Weights
 - Treadmill
 - Stationary bike
 - Cross country skis
 - Elliptical
 - Split boards
 - Paddle boards/Kayaks
- Exercise/nutrition programs, such as
 - Online fitness apps
 - Online nutrition tracker
 - Certified personal trainers
 - Weight loss
 - Meditation Apps
- Race/Club Entry Fees
 - 3K, 5K, triathlon, half marathon, marathon
 - Skiing or Running club
 - Team sports fees



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The following items are NOT eligible under this program:

- Clothing
- Nutrition supplements, energy gels, bars, etc.
- Sports specific clothes or gear except bike helmets
- Accessories for bikes, skis, and split boards
- Boats, Canoes,
- Camping, fishing, hiking, hunting equipment
- Power sport equipment
- Administration fees
- Gym childcare fees
- Medical Procedures billable to insurance (to include chiropractic massage)
- Installation, assembly, or delivery costs
- Repairs
- Shipping
- Warranties

2. Process

To be reimbursed for wellness program/facility fees, the Alyeska employee or loanee must submit a completed electronic *Form 11009, Health Reimbursement Maintenance Form*, with a detailed receipt, including date of service/purchase, vendor, and service/item detail. OHU will review and, if approved, forward the expense record to Payroll for processing. The reimbursement is considered taxable income and will be included in the employee’s first paycheck following payroll’s receipt of the approved expense record.

All expense records must be submitted to the Occupational Health Unit by January 31st to be reimbursed for expenses paid in the previous year.

4.0 References

- *CW-200, Records Retention Schedule.*
- *11009, Health Maintenance Reimbursement Form*

END OF PROCEDURE

5.0 Records

<i>11009, Health Maintenance Reimbursement Form</i>	All records generated as a result of this document will be retained in accordance with <i>CW-200, Records Retention Schedule.</i>
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6.0 Revision History

Revision	Date	Revision Summary
Approved by Robyn Brune, Corporate Health and Safety Supervisor		
16	04/05/23	<ul style="list-style-type: none"> • Section 1.0, Purpose: added clarification that the health maintenance program is for Alyeska employees and loanees. • Section 2.0, Accountable Resources: OHU Program Manager revised to read OHU Designee. • Section 3.0, Procedure, Part B: Added #4. Form 11009 and receipts must be submitted for reimbursement prior to participants last day of employment. • Section 3.0, Procedure, Part C: moved paddle boards/kayaks from NOT eligible to eligible exercise equipment, and added meditation apps for exercise/nutrition programs as eligible. Clarified that chiropractic massage is not eligible for reimbursement. • Added service/item detail as a requirement for submittal on form 11009.
15	02/14/22	<ul style="list-style-type: none"> • Modified OHU/WC Manager to read OHU Manager. • Moved paddle boards/kayaks from the NOT eligible list to the eligible list of exercise equipment. • Modified the exercise/nutrition programs list of reimbursable expenses to include Meditation Apps. • Added chiropractic massage to the list of NOT eligible for reimbursement expenses. • Modified the deadline to submit these reimbursable expenses from March 31st to January 31 for expenses paid in the previous year.
14	12/29/21	Scheduled review. Minor update to Accountable Resources. Added meditation apps to allowed reimbursables. Chiropractic massage was added to the list of non-reimbursable exercise equipment.
13	07/18/19	Updated owner title due to company reorganization. Updated Accountable Resources. Clarified that dependent expenses are not eligible for reimbursement. Major rewrite to Section C, Financial Assistance. Section D, Physical Examination: moved to item 3 under Section B, Eligibility.
12	04/11/18	Updated table with examples of reimbursable items or activities. Updated reimbursement process. Updated References. Updated Records.



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Revision	Date	Revision Summary
11	07/31/17	<p>Updated Occupational Health title from Program Coordinator to Manager.</p> <p>Removed “full-time” from applicable employees and loanees.</p> <p>Removed “reimbursement” and replaced “arranging for payment of the company’s portion of any shared costs” with “submitting to payroll for employee reimbursement” from Accountable Resources section.</p> <p>Added “-interns and Part-Time Employees are eligible at a reduced rate.” Removed portion of Eligibility section.</p> <p>Removed Approval Process and replaced with Financial Assistance section and details.</p>
10	04/15/08	<p>This procedure was revised due to the title of Form 5002 that was changed from “Employee Cash Advance and Expense Record” to “Employee Expense Record.”</p> <p>Updated “Responsible and Accountable Resources” to state “Accountable Resources.”</p> <p>Updated document to state “accountable” vs. “responsible” throughout document.</p> <p>Added “References” section. Updated “Records” section.</p> <p>The publication of this document closes out MAC Action 7564.</p>
9	02/02/06	Updated formatting, references, job titles and descriptions.
8	02/16/04	Formatted for publication in TAPS Document System.
7	11/30/02	Last revision under HR.