



Quick Reference Guide

This one-page flyer highlights the most important DOs and DON'Ts for using wellness funds. Use this as a quick check before submitting expenses. If you have any questions, please reach out to your broker. **Please note, only approved wellness expenses will be reimbursed.**

Approved Expenses

- Onsite biometric screenings (blood pressure, BMI, weight, etc.)
- Onsite vaccination clinics for preventive care
- Group exercise classes (yoga, Pilates, Zumba, stretching)
- Health coaching & educational programs (weight loss, smoking cessation, stress management, cooking demonstrations with certified dietitian/nutritionist)
- Onsite wellness coordinators with Fund approved vendors
- Wellness fairs by vendor (vendor screenings, staging, materials)
- Wellness-related giveaways (pedometers, water bottles, fitness trackers)
- Athletic shoes purchased in bulk for incentives
- Gift cards (Visa, AMEX, wellness retailers)
- Wellness magazine subscriptions
- Walkathon/5K registration fees
- Charitable donations, sponsorships, fundraisers

Not Approved Expenses

- Food and beverages (catering, snacks, drinks – excludes water bottles)
- Competitions not open to all employees (e.g., Biggest Loser, step challenges)
- Gym Equipment (for home, personal or work)(bikes, fitness equipment)
- Stand-up desks
- Renovations, furniture, office supplies (wellness rooms)
- Standard operating or corporate expenses
- Travel costs (hotel, flights, mileage, taxis)
- Social gatherings (picnics, appreciation lunches, sporting events, props, decorations)
- COVID-19 supplies (PPE, cleaning products, air filtration)
- Cash rewards or payroll contributions (excluding stipends)

Submission Checklist

- Reimbursements must be Submitted within 30 days of plan year close
- Employer must reimburse employee first – no direct employee payments, including stipends.
- Please allow up to 45 days for payment

The Fund will reimburse approved expenses by submitting a completed voucher and required documents to **HIFWellness@permainc.com**. Please include the signed voucher along with required back up documents/receipts. Without the below items, reimbursement will be denied:

- Signed Purchase Orders for all items
- Vendor Invoices if applicable OR purchase receipts (must match PO)
 - A W9 must be included for all vendors for payment.
- Check Copies or proof of payment for each item listed on voucher