



North Peace Housing Foundation  
Human Resources Manual  
Policy NPHFR 4.15

<b>Section</b> 4.0 PAY, BENEFITS AND REWARDS		<b>Subject</b> <i>4.15 HEALTH AND WELLNESS PROGRAM</i>	
Page 1 of 3	<b>Board Motion</b>	<b>Initial Effective Date</b> 01 JAN 2020	<b>Last Revised Date</b>

**SCOPE** [The health and wellness of our employees is of utmost importance to us. In order to promote a healthy and productive work environment, we have established the following Health and Wellness Program](#)  
~~The employer has established an employee Health & Wellness program~~ applicable to all Support Services employees, and flexible enough to take individual preferences into account. [Specifically, the Health & Wellness program has been designed to foster a spirit of wellbeing in the workplace.](#)

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- Full and part time employees have the option of allocating their funds to either a Wellness Account (taxable) or a Health Spending Account (non-taxable), depending on their preference.

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- Casual employees will have their eligible funds placed into a Wellness Account.  
[The Health Spending Account \(HSA\) is a tax-free allowance used for medical expenses. It is administered by our Group Benefit provider and is regulated by the CRA due to its tax implications.](#)

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[The Wellness Spending Account \(WSA\) is a taxable benefit meant to encourage active lifestyles and healthy living. The WSA is administered by North Peace Housing Foundation.](#)

**ELIGIBILITY** To be eligible, an employee must be an active employee of the [F](#)oundation on January 1 of the benefit year.

**ENTITLEMENT** On January 1<sup>st</sup> of each year, eligible full-time employees are entitled to a \$500.00 account. Employees working less than full-time are entitled to an account at a pro-rated amount according to their FTE (full-time equivalent) on January 1<sup>st</sup>.

Casual employees are entitled to a \$50.00 account.

Employees are allowed to carry forward the unused portion from one year to the next provided the carry forward amount does not exceed the amount of their current year's entitlement.

**TAX IMPLICATIONS** All items reimbursed under the health and wellness program are subject to all employment taxation legislation.

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[The Health Spending Account is a tax-free benefit whereas the Wellness Account is a taxable benefit.](#)

**HSA ELIGIBLE ITEMS** [Please refer to your Group Benefit booklet for a list of eligible expenses.](#)



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WSA ELIGIBLE  
ITEMS

- > [Gym memberships and fitness classes](#)
- > [Recreational memberships \(e.g., annual memberships such as golfing, curling, etc.\)](#)
- > [Fitness and Sporting Equipment \(tennis racquet, skates, golf clubs, hiking boots, running shoes, skates, skis, paddle boards, kayaks, etc.\)](#)
- > [Fitness Coaching](#)
- > [Air Purifiers](#)
- > [Nutritional Supplements or classes](#)
- > [Essential Oils and diffusers](#)
- > [Health monitoring devices \(e.g., Apple Watch, Fitbit, Oura ring, etc.\)](#)
- > [Smoking Cessation Products](#)
- > [Health and Wellness apps or digital tools, such as meditation and mindfulness apps](#)
- > [Holistic Healing](#)
- > [Art Therapy](#)
- > [Life Coaching](#)
- > [Personal Development Courses](#)
- > [Medical and dental expenses not covered by insurance or costs that exceed insurance reimbursement](#)
- > [Organized group fitness lessons \(e.g. yoga, jazzercise, aquacize, etc.\)](#)
- > [Fitness facility fees \(e.g. Fitness-on-the-Go, Curves, etc.\)](#)
- > [Recreational memberships \(e.g. annual memberships such as golfing, curling\)](#)
- > [Fitness equipment \(pedal bike, skates, weights, yoga mat & ball\)](#)
- > [Exercise videos, Will Fit](#)
- > [Sporting Equipment \(tennis racquet, etc.\)](#)
- > [Air Purifiers](#)
- > [Nutritional Supplements, Essential Oils](#)
- > [Smoking Cessation Products](#)
- > [Medical Expenses Not Covered by Insurance or costs that exceed insurance reimbursement](#)

This is not an exhaustive list. Management will use discretion when approving individual claims.

INELIGIBLE ITEMS

- > Private sales
- > Books, magazines
- > ~~Hobby classes or groups (weaving, drama, music, etc.)~~
- > Computer games
- > Purchases for anyone other than the employee
- > Camping equipment
- > Travel expenses

**Commented [GU1]:** CB: I disagree with the massage/chiro/mental health/medical and dental -- if we include those, then why would anyone opt for an HSA? That is why we have benefits.

**Commented [TM2R1]:** I have taken your comments into consideration and have updated accordingly.

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CLAIM PROCESS

- 1) Each employee will choose how to best use the funds for his/her own particular needs. If you are uncertain as to whether or not your item meets the eligibility criteria, contact your Manager or Human Resources prior to making your purchase.
- 2) Sign, date and attach your original receipt to a completed Health & Wellness Claim form, reference Appendix 8.2.
- 3) Submit your claim to your manager who will approve it and forward it to Human Resources for reimbursement processing.
- 4) Reimbursement of eligible expenses will occur in the pay period following the receipt of the claim; the reimbursement will be included in the employee's regular pay.

LIMITATIONS AND EXCLUSIONS

- 1) The Health & Wellness year ends on December 15<sup>th</sup>. Unused entitlements will be carried forward to the new year according to the carry forward terms.
- 2) ~~3) Expense claims for items purchased between December 16 and 31 are not eligible for reimbursement due to year-end payroll processing.~~
- 2)4) You may continue to submit a claim throughout the year until the available funds in your account has been used.

The plan is designed to carry-forward the entitlement balance, not the expenses. This means the amount to be reimbursed will not, at any time, exceed the entitlement balance available to the employee on the date the purchase was made. For example, on November 15<sup>th</sup>, the employee has an entitlement balance of \$140 and makes a purchase of \$250 in anticipation of receiving a portion of the following year's entitlement. She waits until January 15<sup>th</sup> to submit the claim for \$250; the reimbursement amount will be \$140 which is the amount available to the employee on the date the purchase was made.

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Approved:   
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Tammy Menssa, Executive Director

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Date: March 29, 2023