



# ST. THOMAS MORE COLLEGE

## UNIVERSITY OF SASKATCHEWAN

### STM WELLNESS BENEFIT (Administered by STM Payroll/Benefits)

Note: The following eligible expenses are considered a taxable benefit.

#### ELIGIBLE EXPENSES

##### ***Fitness-related services (memberships and fitness lessons)***

- fitness club memberships (includes membership to any physical activity center)
- registration fees for fitness-related programs or lessons (such as aerobic classes, yoga, dance lessons, figure skating and martial arts)
- sport team memberships and registration fees
- annual memberships and daily passes to athletic facilities (such as golf courses, racquet clubs and ski hills)
- personal trainers, certified fitness or lifestyle consultants and licensed exercise physiologists.
- registration fees for fitness-related events (such as walks, runs and races)
- recreational activity fees (such as boating, or camping fees and trail passes)
- fees for athletic facilities and equipment rental costs
- fitness-related apps, software and programs
- hunting and fishing licenses

*New: \*Family membership is acceptable if the employee is an active fitness centre member or recreational member and provided that the membership is under the employee's name.*

##### ***Fitness equipment***

- durable equipment such as treadmills, exercise bikes and universal gyms
- skates, roller blades, bicycles, child bike trailers, tennis racquets, golf clubs, and specialized sports equipment.

##### ***Specialized sporting equipment***

- fishing rods, fishing supplies, camping tents and camping gear.
- jogging or cycling strollers
- specialized athletic footwear (such as running shoes, golf shoes and swim fins)
- fitness-related apparel (such as running jackets, cycling shorts and swim caps)
- athletic safety equipment (such as helmets, eye protection and mouth guards)
- fitness tracking tools (including watches and heart-rate monitors)
- fitness consoles and accessories, DVDs and downloadable work-out videos

##### ***Health-related services***

- weight management programs (excluding food) including hypnosis seminars
- smoking cessation programs and products
- nutrition programs and counseling

- maternity services (prenatal classes and mid-wife services)
- services of the following alternative health practitioners: reflexologist, iridologist, herbalist, homeopath, athletic therapist, Chinese medical practitioner, Shiatsu therapist, osteopathic practitioner and acupressurist, sleep assessment
- stress management programs
- cholesterol and hypertension screening
- first aid and CPR (cardiopulmonary resuscitation) training
- health, fitness or lifestyle assessments (must be conducted by a certified health professional)
- allergy tests
- vitamins & supplements including herbal products
- sleeping aids (such as orthopedic mattresses and pillows, darkening blinds, white noise machines and earplugs)
- medical alert products and services
- personal care items (such as heating pads, thermometers, sunscreen, teeth whitening kits and denture products)
- life coach services
- other alternative wellness services: Reiki, Ayurvedic medicine, touch therapy, Rolfing,
- cosmetic procedures (such as Botox, dermabrasion and tattoo removal)
- light therapy and hypnosis seminars
- day-spa services (such as baths, saunas and aesthetic treatments)

### ***Spiritual Enrichment Activities***

- Spiritual counselling fees
- Spiritual retreats and workshops (excludes cost of travel and accommodations)
- Spiritual conferences, classes and group seminars

### **Education and personal development**

- tuition fees for university, college or continuing education (including books and supplies)
- fees for language training and tutoring
- fees or dues for professional memberships or associated with maintaining a professional designation
- hobby or general interest classes and supplies (including cameras)
- personal computers, accessories and software
- online courses offered through a recognized educational institution requiring registration
- cultural activity passes or tickets (such as museums, zoos, music concerts, plays, operas and symphonies)
- lessons, courses, seminars and conferences (including books, instruments, supplies and accessories)
- reading materials and book club memberships (including e-readers and books)
- finance-related apps, software and programs
- smartphones and tablets

### **Green living/Work-life balance:**

- childcare expenses

- elder-care expenses
- pet-care services (such as kenneling, obedience training, dog walking and veterinarian fees)
- domestic services (such as house cleaning, snow removal, landscaping and moving services)
- intelligent personal assistant (IPA) devices (such as Google Assistant and Amazon Alexa)

#### **Safety initiatives:**

- baby safety equipment
- first aid products (such as bandages, Automated External Defibrillators (AED) and disinfectant)
- smoke alarms, carbon monoxide (CO) detectors, fire extinguishers and fire escape ladders
- personal protective gear (such as safety boots, eye protection and safety gloves)
- home security systems and associated fees

#### **Professional services:**

- estate planning, financial investment counselling and tax return preparation
- legal expenses (such as wills and house purchases/sales)

#### **Insurance premiums**

- life and critical illness insurance premiums, as well as long-term care facility premiums
- pet insurance premiums

#### **Financial:**

- Registered Retirement Savings Plan (RRSP) contributions
- Registered Education Savings Plan (RESP) contributions
- Tax-Free Savings Account (TSFA) contributions

#### **EXCLUSIONS**

- Services provided to family members
- courses provided by a non-accredited institution
- sandals (including golf and hiking sandals)
- clubs where the focus is not a physical activity
- claims for family members
- interest charges or maintenance fees
- maintenance of equipment
- certain equipment or supplies for hobby activities (such as rifles, paint-ball supplies)
- assembly, service or delivery fees
- fees related to the physical activity (e.g., lockers, books, exams)

#### **CLAIM PROCEDURES**

St. Thomas More College (Payroll office) will provide reimbursement for eligible wellness expenses incurred by the eligible member. **Original receipts only (with packing slips, if applicable)** will be processed and the Claims Form completed and submitted with receipts.

Claims will be processed in the same month if received by the Payroll office by the 4<sup>th</sup> and/or 20<sup>th</sup> of the month.

#### **TAXATION**

St. Thomas More College's interpretation of the Income Tax Act, amounts reimbursed from the Wellness Spending Account are considered taxable benefits to the eligible member.

#### **WELLNESS SPENDING ACCOUNT INFORMATION**

If your Wellness Spending Account reaches a zero balance at any time during the plan year, any further expenses will not be carried forward. If there is a credit remaining in the account at the end of the plan year, it can be carried forward to the next plan year but only to the extent that it represents one year's allocation.

Any unused credit amounts are forfeited by the member and revert to St. Thomas More College.

#### **CONTINUATION OF COVERAGE**

The Wellness Spending Account is in effect while you are actively at work. If you are on an approved leave of absence and have continued health benefits, your eligibility for the Wellness Spending Account will continue.

#### **TERMINATION OF COVERAGE**

Coverage will cease in the event of:

- a member's employment termination,
- a member's retirement,
- a member's death,
- a change in a member's eligibility, or
- the program termination.

*The above information is intended only as a summary of your Wellness Spending Account. In the event of any misunderstanding or discrepancy, benefits will be paid according to the Terms of Reference and applicable legislation.*



# ST. THOMAS MORE COLLEGE

## UNIVERSITY OF SASKATCHEWAN

### Wellness Spending Account Claim Form

**Name:** \_\_\_\_\_

**Department:** \_\_\_\_\_

Reimbursement is limited to the list of eligible expenses noted on the plan summary.

- Receipts are to be attached to your claim form and clearly indicate date of purchase, item claimed and total cost. **Original receipts are required.**
- Indicate with a check (✓) the item(s) you are claiming. Multiple items may be claimed on one form.
- Where applicable, receipt must be in employee's name.

<b>Wellness Items for use by Employee</b>
---

- Fitness-related services (membership and fitness lessons)
- Fitness equipment/Specialized sporting equipment
- Health-related services
- Spiritual enrichment activities
- Education and personal development
- Green living/Work-life balance/Safety initiatives
- Professional services/Insurance/Financial

Total Amount Claimed: (not to exceed maximum benefit amount)

\$	
----	--

I hereby declare that all information is correct and accurate. My claim adheres to the requirements of the program and I understand that receipts are subject to verification.

\_\_\_\_\_  
**Employee Signature:**

\_\_\_\_\_  
**Date:**

Payroll/Benefits Use Only	
Employee#:	Payroll verified:
Wellness Fund Balance:	Date: