

SCHOOLS WELLNESS HEALTH PROGRAM

INSURANCE FUND



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.

☒ 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, teachers lounge)
- 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
- The Fund will reimburse approved expenses twice a year (December and July) by submitting a completed voucher (available on the website) 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)
- Check Copies or proof of payment for each item listed on voucher
- Stipend Policy:
 - All stipends awarded under the SHIF Wellness Grant shall be processed through district payroll and treated as taxable compensation. Stipends must be:
 - Approved by board resolution;
 - Included in board minutes;
 - Reported as wages on Form W-2;
 - Supported by documentation of duties performed.

Stipends shall not be issued via personal check or 1099 to salaried employees. Exceptions to this policy are not permitted unless the recipient is a bona fide independent contractor, as defined by IRS and NJDOE standards.

- The only vendors to be paid directly by the Fund are the 11 approved vendors.
- All expenses are reimbursed to the BOE only.