



Operating Procedure

Occupational Health Unit

Title: Health Maintenance Reimbursement

Number: OHU-8.07

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Revision: 17

Effective Date: 05/27/25

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

Health and Safety: Alyeska's Health and Safety Designee is accountable for approving all health maintenance programs, facilities, and activities, processing employee reimbursement entries, submitting to payroll for employee reimbursement and for budgeting annually, as appropriate. The Health and Safety 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 information and receipt/s 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 Reimbursement 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 requests for reimbursement using the Health Maintenance Reimbursement App prior to his/her last day of employment.



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C. FINANCIAL REIMBURSEMENT

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

1. 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. There is no guarantee of reimbursement for an item or service if the allocated budget has been met.

2. Types

Reimbursement is limited to the Eligible items listed within the Health Maintenance Reimbursement App; a listing of Ineligible items is also maintained. As best practice, any item or service an employee questions as eligible should be verified by contacting the Health and Safety Designee prior to purchase. There is no guarantee of reimbursement for an item or service if it does not align with this procedure.

3. Process

To be reimbursed on a cost-shared basis for items and services covered under this program, the Alyeska employee or loanee must submit an expense submission to the Health Maintenance Reimbursement App, identifying date of expenditure, and including a detailed receipt with date of service/purchase, vendor, and service/item detail. One expense submission per categorized item or service listed on a receipt; see examples outlined below. The Health and Safety Designee will review and, if approved, the expense will be processed to Payroll for reimbursement. 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 requests must be submitted to the Health Maintenance Reimbursement App within the quarter of expenditure, and no later than 4-weeks (28 days) past the end of the quarter. Any exceptions will be identified within the App.

a. Categorized Expense Examples

- 1) You pay for three months of gym membership at once and the gym itemizes them on a single receipt, submit one reimbursement request due to the single expenditure for the same services (gym membership).
- 2) You make three separate payments for three months of gym membership, submit three separate reimbursement requests - one for each expenditure as they are on different receipts.
- 3) You purchase a weight bench and free weights on the same receipt, submit two reimbursement requests, uploading the same receipt for each item. Multiple expense submissions are needed in this scenario because of the multiple types of items.



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4.0 References

- [CW-200](#), *Records Retention Schedule*.

END OF PROCEDURE

5.0 Records

All records generated as a result of this document will be retained in accordance with [CW-200](#), *Records Retention Schedule*.

6.0 Revision History

Revision	Date	Revision Summary
Approved by Brian Beauvais, Health and Safety Manager		
17	05/27/25	<ul style="list-style-type: none">• Updated procedure to direct employees to the new Health Maintenance Reimbursement App.• List of Eligible and Ineligible items moved from this document to be maintained within the App.• Changed due-date of expense requests to the end of quarter, allowing up to three late submission requests within the calendar year (if submitted within 28 days after the end of the quarter the expenditure occurred).
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.



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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.
11	07/31/17	Updated Occupational Health title from Program Coordinator to Manager. Removed “full-time” from applicable employees and loanees. 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. Added “-interns and Part-Time Employees are eligible at a reduced rate.” Removed portion of Eligibility section. Removed Approval Process and replaced with Financial Assistance section and details.



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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.