

Wellness Credits Eligible Services

Overview and Strategy

The overall goal of a wellness credit offering:

- Encourage customers to establish, maintain and implement a wellness strategy within the covered population.
- Offer services that directly affect the **physical and mental** well-being of the overall population of covered members:
 - Eligible **physical health** services are directly related to improving physical health, resulting in increased wellness awareness and potentially reducing claim costs. These services must be in direct relation to physical health and not a subset of services.
 - Example: dedicated onsite wellness coordinator, health clinic preventive services.
 - Non-eligible **physical health** services are indirectly related to physical health and may be considered a subset of services.
 - Example: workspace ergonomic and safety equipment and training.
 - While they assist in the physical wellbeing of an individual, they are not a direct part of a wellness plan.
 - Eligible **mental health** services are directly related to improving mental health, resulting in increased mental health stability and wellness strategies. These services must be in direct relation to mental health and not a subset of services.
 - Example: Mental and behavioral management classes that provide resources to the employer to improve mental and behavioral stability for the employee population.
 - Non-eligible **mental health** services are indirectly related to mental health and may be considered a subset of mental health services.
 - Example: financial classes, employee entertainment and morale activities, individual programs not designed to benefit the overall employee population.
 - While they may assist in the mental wellbeing of an individual, they are not a direct part of a wellness plan.

Eligible Services

The following items are eligible services covered by wellness credits.

- Biometric screening to measure cholesterol, blood pressure, blood glucose, body fat percent
- Dedicated onsite health and wellness coordinator service/program management
- Employee Assistance Program (EAP) fee reimbursement.
 - Invoice from EAP must include the eligible wellness service and associated costs with this specific service. Payments for an overall EAP with in-eligible services will not be reimbursed.
- Flu shots
- Food related items that contribute to an overall healthy lifestyle to incent employee participation in onsite wellness event.
- Health and wellness onsite educational classes from an external vendor or speaker (i.e. stress management, nutrition, cooking demo, etc.)
- Hepatitis B shots
- Health coaching (modifiable risks) online, telephonic, onsite/via mail
- Onsite behavioral change classes: weight watchers, smoking cessation, anger management
- Onsite health clinic preventive services
- Onsite health fair services- osteoporosis screening, skin cancer screening, nutritional consulting/education, mobile mammography or cardiovascular screening
- Paper health assessments
- Printing expenses and materials that are directly related to a health and wellness event to promote participation in an eligible wellness service
- Smoking cessation programs and therapy (i.e. nicotine replacement therapy) including cotinine testing to test for tobacco usage
- Wellness related consultative services from physicians, licensed therapists, registered dieticians and other health care professionals
- The fees for producing data feeds to UnitedHealthcare/Optum® for biometric screening data to be loaded into Rally (standard file layout only). Non-standard file layouts may generate additional costs and are not considered reimbursable under this program
- The fees for generating out of company data extracts that are explicitly used to support wellness programs

Eligible Services with Taxable Considerations

The following items are eligible services covered by wellness credits that may be taxable to the plan participant. Please consult with your tax professional.

- Gym equipment- onsite and offsite
 - Example: Bikes including Peloton, Elliptical, treadmill, pedometers, weights, Apple watch
- Gym memberships
- Online activity tracking and reward administration
 - Example: Paying a health and wellness vendor to track employee participation in wellness service

- Relaxation equipment and services for onsite relaxation: Massage chairs, onsite massage, massage therapy, yoga
- Incentives related to health and wellness that are provided to encourage participation in wellness programs.
 - Examples: Entry fees to a wellness event, attire/gear for a wellness event, rental of equipment for wellness activity, water bottles, achievement awards, prizes for participation.
 - Gift cards and cash

Eligible Services Invoice Requirements

- Invoice outlining eligible wellness expense must be submitted for expenses incurred within the policy/contract year to UnitedHealthcare within 30 calendar days from end of that policy/contract year.
- Invoice should be addressed to the customer and include:
 - Dates of service
 - Total number of employees participating
 - Cost per employee and total overall cost
 - Itemized charges indicated by wellness service, and dollar amount of each

Non-Eligible Services

Beginning, May 1, 2021 the following items have been removed as eligible services. Customers that previously received approval to offer these services, may do so until the end of their current policy/contract period.

- Executive physicals.
 - Intent of wellness credits is to offer to the overall population.
- Ergonomic equipment. Examples include workstations, chairs, keyboards, back supports, headsets
 - These are standard employer expenses and outside of a wellness service offering.
- Lactation room supplies. Examples include couch, table, lighting.
 - These are standard employer expenses and outside of a wellness service offering.

Questions related to eligible services and submission for reimbursement should be directed to your UnitedHealthcare Account Management team.

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