

Request for Legislative Action

Ord. #5652
Sponsor: Theresa Cass Galvin
Date: August 22, 2022

Completed by County Counselor's Office			
Action Requested:	Ordinance	Res.Ord No.:	5652
Sponsor(s):	Theresa Galvin	Legislature Meeting Date:	8/22/2022

Introduction
Action Items: ['Appropriate']
Project/Title:
Ordinance requesting an appropriation of \$21,000 to fully fund the 2022 Wellness Reimbursement Program.

Request Summary
<p>This request is to appropriate \$21,000 from the assigned portion General fund balance for Wellness Education. This appropriation will help the continuation of the Wellness Reimbursement Program. A total of \$196,621 is assigned in the fund balance of the General Fund for these purposes. The wellness reimbursement program has been established as a popular and important way for associates to take advantage of wellness opportunities that they may not typically be able to fund. Offering this wellness reimbursement program will continue to allow associates to pursue wellness activities that meet their current individual needs and supports a well-rounded healthy lifestyle both at work and at home. As we have done in the past, associates will be given a list of eligible expenses, that they will be able to claim for reimbursement. The reimbursements are considered a benefit-in-kind and will be taxable income. In 2021, there were 262 associates that took advantage of the wellness reimbursement program, for a total of \$45,150 in reimbursements. Our request is to continue with the established \$175 maximum for 2022, and plan for a potential increase in participation of 20%, putting our total projected cost for the 2022 Wellness Reimbursement at \$55,000. The first \$34,000 was already budgeted during the Adopted Budget; therefore, the appropriation request is for the balance of \$21,000. The \$34,000 is a reimbursable expense we will receive from Blue Cross and Blue Shield for 2022. Attached is a draft communication of the 2022 Wellness Reimbursement Program.</p>

Contact Information			
Department:	Human Resources	Submitted Date:	8/9/2022
Name:	Michelle K. Chrisman	Email:	MChrisman@jacksongov.org
Title:	Director of Human Resources	Phone:	816-881-1204

Budget Information	
Amount authorized by this legislation this fiscal year:	\$21,000
Amount previously authorized this fiscal year:	\$ 0
Total amount authorized after this legislative action:	\$21,000

Request for Legislative Action

Is it transferring fund?			Yes
Transferring Fund From:			
Fund:	Department:	Line Item Account:	Amount:
001 (General Fund)	9999 (*)	32810 (Undesignated Fund Balance)	\$21,000
Transferring Fund To:			
Fund:	Department:	Line Item Account:	Amount:
001 (General Fund)	1196 (Wellness Incentive)	56711 (Wellness Incentive)	\$21,000

Prior Legislation	
Prior Ordinances	
Ordinance:	Ordinance date:
5321	March 30, 2020
Prior Resolution	
Resolution:	Resolution date:
5207	March 4, 2019

Purchasing	
Does this RLA include the purchase or lease of supplies, materials, equipment or services?	No
Chapter 10 Justification:	
Core 4 Tax Clearance Completed:	
Certificate of Foreign Corporation Received:	
Have all required attachments been included in this RLA?	

Compliance	
Certificate of Compliance	
Not Applicable	
Minority, Women and Veteran Owned Business Program	
Goals Not Applicable for following reason: Not spending money	
MBE:	.00%
WBE:	.00%
VBE:	.00%
Prevailing Wage	
Not Applicable	

Fiscal Information

Request for Legislative Action

- Funds sufficient for this appropriation and/or transfer are available from the source indicated on the budget information tab.

Request for Legislative Action

History

Submitted by Human Resources requestor: Michelle K. Chrisman on 8/9/2022. Comments:

Approved by Department Approver Gina M. Campbell on 8/9/2022 11:53:57 AM. Comments:

Not applicable by Purchasing Office Approver Barbara J. Casamento on 8/9/2022 12:35:08 PM. Comments:

Approved by Compliance Office Approver Katie M. Bartle on 8/9/2022 1:08:25 PM. Comments:

Returned for more information by Budget Office Approver Mark Lang on 8/9/2022 2:38:07 PM. Comments: The "Request Summary" references \$202,832, which was in the 2020 CAFR. Now that the 2021 CAFR has been distributed, please change this number to \$196,621.

Submitted by Requestor Michelle K. Chrisman on 8/9/2022 3:13:40 PM. Comments: Changed CAFR amount to \$196,621.

Approved by Department Approver Gina M. Campbell on 8/9/2022 4:23:21 PM. Comments:

Not applicable by Purchasing Office Approver Barbara J. Casamento on 8/10/2022 9:09:23 AM. Comments:

Approved by Compliance Office Approver Katie M. Bartle on 8/10/2022 1:55:12 PM. Comments:

Approved by Budget Office Approver Mark Lang on 8/11/2022 2:13:26 PM. Comments: The fiscal note is attached.

Approved by Executive Office Approver Sylvia Stevenson on 8/11/2022 2:26:35 PM. Comments:

Approved by Counselor's Office Approver Elizabeth Freeland on 8/17/2022 3:34:04 PM. Comments:

Supplemental Appropriation Request Jackson County, Missouri

Funds sufficient for this appropriation are available from the source indicated below.

Date: August 9, 2022

Ord # 5652
eRLA ID #: 610

Org Code/Description	Object Code/Description	From	To
001	General Fund		
9999 -	32810 Undesignated Fund Balance	\$ 21,000	\$ -
1196 Wellness Incentive	56711 Wellness Incentive	-	21,000
		<u>\$ 21,000</u>	<u>\$ 21,000</u>

APPROVED
By Mark Lang at 2:12 pm, Aug 11, 2022

Budget Office

DRAFT – PENDING LEGISLATION
REQUESTS CANNOT BE SUBMITTED AT THIS TIME



2022 Wellness Reimbursement Program

WELLNESS REIMBURSEMENT

It's up to you to make personal choices that fuel your well-being! Jackson County Living Smarter will reimburse each full-time associate up to **\$175 for the year**, towards eligible wellness expenses that fit their unique wellness needs and interests.

Program Eligibility

Full-time associates may incur and submit expenditures for reimbursement the first day of the month following their hire date. Associate must still be employed at the time reimbursement is to be paid.

Program Requirement

The maximum reimbursement is \$175 total for the year, paid as a reimbursement via payroll check, with applicable taxes withheld. The item or activity must be an eligible product or service that is purchased and used **1/1/2022 to 11/28/22**, by an eligible Jackson County associate. Misuse or fraudulent use of the program may result in disciplinary action. Expenses must occur and be submitted **by Monday, Nov. 28, 2022; any unused amount will be forfeited.**

The Reimbursement Process

- Submit the electronic wellness reimbursement form along with scanned receipt of payment(s). Or print out the paper form, attach receipts, and send interoffice or mail to: Jackson County Courthouse, Attn: Jill Miller, Human Resources, Suite 104, Kansas City, MO 64106. Receipts should be batched together for a **minimum of \$75 per request**, with any sales tax or service fees excluded from the total. Shipping fees can be included as part of the total if they were paid to obtain a reimbursable item. Receipts totaling more than the maximum allowed will be reimbursed at \$175. The details of the product or service must be clearly stated on receipt, along with the amount, and payment date. Associate's name must be clearly stated on membership, class, or event fees, for the claim to be approved. Receipts from an auto-pay membership can be obtained from your member portal or the facility; avoid sending bank or credit card statements as proof of payment. All submissions are subject to wellness team approval based on eligibility, eligible expense, receipts submitted, and reimbursement program balance. Requests will be accepted through November 28, 2022.

Placeholder for 2022 Electronic Form

Placeholder for Reimbursement Request Paper Form

Eligible Expenses

- Membership or Initiation Fees: Health Club, Fitness Center, Community Center, or Studio
- Session, Class, or Program Fees: Personal Training, Fitness, Weight Mgmt , Stress Mgmt
- Athletic Event Registration Fees: 5K, Marathon, Duathlon, Triathlon, Obstacle Course, etc.
- Smoking Cessation program not covered by insurance
- Home Exercise Equipment: strength or cardio equipment & accessories, mat, DVD, wearable fitness device etc.

Note: Virtual memberships, classes, events, and meetings, that can be verified, will be accepted.

Non-Eligible Expenses

Gifts, apparel, shoes, food, travel, supplements, cell phone accessories, camping or recreational activities or equipment, spa services (massage, facial, pedicure, etc.), items fully or partially covered by insurance, secondhand items from private seller, other items as determined by the wellness team.

All information is also available on Sharepoint.

Need ideas how to spend your free money? Send me an email with your goals and interests!