

Wellness Reimbursement Account: Your healthy lifestyle benefit



Gordon Food Service now offers a \$500 wellness benefit for full time employees (quarterly proration for new hires).

This benefit provides you with money to use on eligible expenses that can help to boost your health and financial wellness!

The employer-funded account helps you to take advantage of education and tools centered around important decisions regarding your life and health. Examples of benefits include:

- Exercise equipment
- Fitness/gym membership
- Exercise apps
- Sports leagues
- Nutrition Support/Weight Management Programs
- Yoga and Meditation classes
- Group exercise challenges
- Online services and counseling for mental health issues like stress, depression and anxiety
- Mental Health apps or programs
- Estate Planning and Goal Setting
- Financial Planning and Investment counseling

Here's how it works

Employees with an eligible expense can pay using personal funds and then receive a reimbursement.

Reimbursements will be issued to you through payroll. Please note:

- Payment cards are not used for this type of benefit.
- This is an individual benefit and only those expenses incurred by employees are eligible for reimbursement.



Easy Reimbursement:

Submit your claim with receipts through the Optum Financial online portal or mobile app. Select the closest category to your expense type.

Once approved, Gordon Food Service will issue reimbursements to you through payroll. You will see your approved reimbursement in approximately 2-3 payroll cycles, depending on the timing of your claim.

Using your account is easy

Follow these steps to get the most out of it.

Step 1 — Pay for eligible expenses using personal funds

Be sure to collect and save an itemized receipt from your health or financial service provider or merchant with all the required information.

- Name of employee receiving service (this benefit is for employee expenses only)
- Date of service
- Provider's name and address
- Description of the service
- Amount paid

Step 2 — Request reimbursement for your expense

- Sign in to your account online at secure.optumfinancial.com or by using the Optum Financial mobile app. When accessing your account for the first time, you will need to create a HealthSafe ID® username and password. HealthSafe ID adds an extra layer of security to your account by using two-factor authentication.
- Select “Reimburse Myself” and follow the on-screen prompts to fill in the requested information.
- Check your itemized receipt to make sure it contains the five pieces of required information for reimbursement.
- Follow the on-screen prompts to submit your documentation. Snap a photo and upload it directly from your mobile device.* Or upload from your desktop computer.

You're done!

Once all the information is submitted correctly, the claim will be processed.

After your claim is reviewed and approved, you will receive your reimbursement through payroll in the next available pay period.

Sign back into your account to check the status of your claim at any time.



Use technology to your advantage

Save time by downloading the Optum Financial mobile app and use it to:

- View account balances and payments
- Request a payment
- Take a photo of your receipt and upload it directly to the system



Frequently asked questions

Q: Can I contribute funds to this account?

A: No, these are employer-funded programs for you to use for eligible financial, health and wellness expenses as defined by your employer's plan.

Q: Do I have to pay taxes on the amount I use?

A: Yes, you will have to count these funds as income or pay taxes on the amount used.

*Data and messaging rates may apply.

**Employer will be solely responsible for determining whether reimbursement is taxable income and for any and all tax reporting. Lifestyle Accounts are administered on behalf of your plan sponsor by Optum Financial, Inc. or ConnectYourCare, LLC (collectively, "Optum Financial") and are subject to eligibility and restrictions. This communication is not intended as tax or legal advice. Please contact a legal or tax professional for advice on eligibility, tax treatment, and restrictions. Please contact your plan administrator with questions about enrollment or plan restrictions. Federal and state laws and regulations and the design of your plan are subject to change.