

Reclamation Manual

Directives and Standards

Subject:	Employee Wellness Program
Purpose:	This Directive and Standard (D&S) outlines wellness program authority, services, and procedures intended to promote the physical and mental wellness and fitness of employees that encourages healthy life choices. This D&S supports regional efforts for preventative health programs and wellness and fitness activity reimbursement. Reclamation and its employees and families benefit from a healthy workforce through lower absenteeism, increased job productivity and morale, and reduced overall healthcare costs.
Authority:	5 U.S.C. 7901 ; 41 CFR § 102-79.35 ; Comptroller General Decision B-240371 - Purchasing access for employees to a private fitness center's exercise facilities as part of an agency fitness program authorized by 5 U.S.C.; Comptroller General Decision B-256194 - Registration fees for an athletic competition may not be paid for with appropriated funds; Comptroller General Decision B-262008 - Participation of an agency "team" in an athletic competition does not change analysis that registration fees for such athletic competition are not an appropriate use of agency funds; Federal Property Management Regulations, 41 CFR Part 101-5.3; Federal Property Management Regulations, 41 CFR Part 102-79.30 (September 30, 2005) and Part 102-79.35 (July 1, 2003) Assignment and Utilization of Space: Fitness Centers; OPM Work-Life (opm.gov) ; Department of Interior (DOI) Absence and Leave Handbook (doi.gov) ; Employee Assistance Programs relating to drug and alcohol abuse.
Approving Official:	Deputy Commissioner - Policy, Administration and Budget
Contact:	Human Resources Policy Office (84-12100)

1. Introduction.

The Bureau of Reclamation recognizes the benefits of a healthy workforce, and actively promotes and supports employee wellness activities. The Wellness Program helps employees in achieving healthy lifestyles while permitting employees the flexibility to choose wellness program and fitness components that best meet individual needs and preferences. The Wellness Program supports employees' efforts to gain and maintain healthy habits by providing wellness resources and activities and reimbursing employees for a portion of the eligible expenses incurred for fitness activities and wellness programs.

Employees will use non-duty, unpaid time, to participate in individual health and fitness activities. Employees may use lunch periods, and time before and after work hours.

Supervisors are encouraged to accommodate employee requests for alternate work schedules and annual leave to participate in health and fitness activities that does not

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interfere with duty and mission accomplishment. Employees in a position with a physical fitness requirement as a condition of employment, such as law enforcement and firefighters, may participate in health and fitness activities during work hours in accordance with bureau policies.

Per the current version of the DOI Leave and Handbook, Chapter on Excused Absences, “in certain limited circumstances, a Bureau may exercise regional leadership authority to grant short periods of excused absences for participation in officially sponsored group health and fitness programs, such as a federal fitness day event, a bureau-sponsored health screening or informational wellness event.”

2. **Applicability.**

This D&S applies to all permanent and temporary employees with assignments into a Reclamation position. Reference the “Employee Eligibility” section paragraph 9 for specific wellness/fitness program and services eligibility. Employees are encouraged to participate in the Wellness Program, participation is voluntary.

Nothing in this D&S is intended to eliminate or modify any requirements established by law, regulation, or Executive Order.

3. **Requirements and Responsibilities.**

A. **Reclamation Leadership Team (RLT)** is responsible for:

- (1) establishing local wellness procedures and services that meet the minimum requirements set forth in this D&S for their region, directorate or office;
- (2) ensuring regional budgetary support for the Wellness Program and fitness reimbursement;
- (3) establishing the local reimbursement recurrence allowable (monthly, quarterly, or annually);
- (4) establishing the local maximum allowable reimbursement and participant cost-share;
- (5) ensuring local wellness procedures and services are consistent for employees at a particular location; and
- (6) supporting the Wellness Program and fitness and wellness activities that help employees in achieving and maintaining physical and mental health and fitness. Third Level Paragraph

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- B. **Deputy Commissioner – Policy, Administration and Budget** is responsible for approving or denying requests for individual wellness program or fitness activity deviations from this D&S.
- C. **Human Capital Officer (HCO)** is responsible for:
- (1) administering the Wellness Program; and
 - (2) monitoring and evaluating compliance with the requirements of the Wellness Program to include reviewing requests for deviation, established in this D&S.
- D. **Human Resources Policy Office (HRPO), Manager Workforce Relations Division** is responsible for:
- (1) designating a Reclamation Wellness Program Coordinator within HRPO;
 - (2) monitoring and evaluating compliance with the requirements of the Wellness Program established in this D&S;
 - (3) ensuring requests for information regarding the Wellness Program are answered timely; and
 - (4) ensure timely Reclamation Manual (RM) review and monitoring of this D&S.
- E. **Reclamation Wellness Program Coordinator** is responsible for:
- (1) establishing minimum requirements and preparing and updating Reclamation-wide guidance for the Wellness Program;
 - (2) reviewing and providing input on local wellness procedures and services, and requests for deviation to ensure D&S requirements are met;
 - (3) ensuring the local wellness procedures and services, as implemented, meet the minimum requirements set forth in this D&S;
 - (4) advising and providing information related to the D&S application for Wellness Program requirements;
 - (5) compiling Reclamation-wide data related to the participation rates and costs for the Wellness Program; and
 - (6) coordination of individual program deviation requests to the Deputy Commissioner – Policy, Administration and Budget.

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F. Regional Wellness Coordinator is responsible for:

- (1) gathering regional data on an annual basis and reporting to the Reclamation Wellness Program Coordinator the number of participants and the amount spent on the Wellness Program, when requested;
- (2) coordinating review of local wellness procedures to ensure compliance with this D&S;
- (3) coordinating with supervisors to approve and ensure consistency of local approvals for wellness/fitness activities eligible per this D&S;
- (4) maintaining wellness agreements, reimbursement documents, and records related to the Wellness Program;
- (5) review requests for reimbursement for compliance with this D&S, completion and accuracy, verification of the annual maximum is not exceeded, and record reimbursement data;
- (6) processing approved requests for wellness reimbursement to the Interior Business Center (IBC) Payroll Operations Division;
- (7) ensuring that all the procedures outlined in this D&S are followed, wellness agreements and reimbursement documents are completed, and only eligible expenses for wellness/fitness activities are approved; and
- (8) providing information and guidance to supervisors and employees on the Wellness Program, local wellness procedures, program reimbursement procedures, and this D&S to include requests for deviation prior to submission to the Reclamation Wellness Program Coordinator.

G. Supervisor (or Designee) is responsible for:

- (1) reviewing employee required Wellness Agreement (Appendix A), Medical Screening Questionnaire (Appendix B), Fitness Reimbursement Request (Appendix C), and Report of Taxable Fringe Benefits (Appendix D) for accuracy in accordance with this D&S;
- (2) ensuring the D&S (see Paragraph 5) and local maximum reimbursable amount is not exceeded;
- (3) review and approve or deny other fitness activities not specifically included or excluded in this D&S;
- (4) maintaining employee wellness agreement documents in a secure filing system; and

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- (5) reviewing and approving a completed copy of employee fitness reimbursement request form, Report of Taxable Fringe Benefits appendices, with receipts, to the Regional Wellness Coordinator for processing to the IBC Payroll Operations Division no later than September 30th of the current fiscal year.

H. Employees are responsible for:

- (1) completing Wellness Agreement (Appendix A) and Medical Screening Questionnaire (Appendix B) to participate in the fitness component of the Wellness Program;
- (2) providing a Fitness Reimbursement Request (Appendix C) and timely and current Report of Taxable Fringe Benefits form (Appendix D), with receipts, for reimbursement of eligible expenses to the supervisor for signature;
- (3) forwarding a completed copy of a Fitness Reimbursement Request (Appendix C) and Report of Taxable Fringe Benefits form (Appendix D), with receipts, to the Regional Wellness Coordinator for processing no later than September 30th of the current fiscal year; and
- (4) adhering to all applicable guidance for the Wellness Program as set forth in this D&S and any additional local wellness procedures, as applicable.

4. Local Wellness Procedures and Services.

The RLT and local supervisors, in coordination with the Regional Wellness and Safety Coordinator(s), have the flexibility to develop and promote a local wellness program that fits community and cultural aspects. The local wellness program services may include health screenings, physical and mental health information, nutrition support, other informational health and wellness classes, fitness challenges, weight loss programs, and promotional wellness communication.

Each RLT member or designee (for the Denver and Washington Offices only) may develop and promote local wellness procedures and services that include establishing prior approval for participation using a Wellness Agreement (Appendix A) and requirements for minimum participation time spent in wellness/fitness activities.

Local wellness programs may address any of the following services for wellness/fitness activities:

- A. Reimbursement for fitness activities in accordance with this D&S.
- B. Education to encourage and maintain a healthy lifestyle. Examples include wellness fairs and presentations, fitness clinics, resource libraries, newsletters, and training programs.

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- C. Educational programs to promote and maintain physical and emotional health and to prevent illness and disease. Common programs include mental health awareness presentations, diet and nutrition, stress management, financial management, substance abuse, physical activity, disease prevention and management, and weight control.
- D. Regional or office group engagement activities to motivate employees to improve their overall well-being and cultivate a sense of community. Examples include book groups, meditation or yoga lunchtime groups, healthy recipe exchanges, healthy potluck lunches, peer support groups, walking groups, and fitness assessments.
- E. Health screenings and immunizations administered by qualified medical staff to assess an employee's health status and potentially detect or prevent the presence or risk of disease. Medical staff may refer employees to the DOI Employee Assistance Program, private licensed physicians, or other health resources. Common voluntary workplace screenings may include blood pressure, blood lipids, glucose, vision, and hearing.
- F. Workplace environment adjustments to supply equipment and space that encourages wellness. Examples include making stairways desirable for walking; installing bike racks, standing desks, showers, and/or gyms; setting aside quiet rooms for stress relief or meditation; or creating a community garden.

Other subsidy programs such as the Transportation and Bicycle Benefit Program (348 DM 2, Part 2) are not covered under this D&S.

5. **Reimbursement/Funding.**

Funding for approved individual wellness and fitness activities is provided by the regional operational budget and based on fiscal year budget. The Reclamation annual maximum reimbursement amount shall be \$500 per fiscal year with a participant cost-share (of the total requested reimbursement amount) of no less than 25 percent to enhance the employee's investment and commitment to the Wellness Program.

Employees may participate in and get reimbursed for more than one fitness activity or wellness service or more than one aspect of each component up to the total reimbursement maximum per year.

Funding for other regional wellness program services will be per applicable Federal budgetary, financial appropriation, and property regulations.

6. **Participation.**

Participation in any component of the Wellness Program is voluntary and individual activities must be done on employee's own time. No official duty time is authorized for individual wellness or fitness activities under this D&S or local wellness procedures or program, except for positions with a physical fitness requirement as a condition of employment.

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7. **Liability.**

Reclamation will not be held liable for injuries sustained by employees participating in the Wellness Program which occur during the use of fitness and recreational facilities and activities outside of official working hours, on or off Federal premises.

8. **On-site Facility.**

On-site fitness facilities may be provided, per federal regulations by the region/directorate/office at no cost, or with a cost-share, to employees. Availability of an on-site facility shall not replace nor reduce the total reimbursable amount allowed to employees when the employee has elected to use the on-site facility.

9. **Employee Eligibility:**

- A. Employees appointed to a permanent position are eligible for all Wellness Program services, including the wellness/fitness reimbursement.
- B. Employees appointed to a Term or temporary position with an appointment of twelve (12) months or longer, are eligible for all Wellness Program services, including wellness/fitness reimbursement while employed.
- C. Employees appointed to a Term or temporary position with an appointment of less than twelve (12) months are eligible to participate in group and other health and wellness services but are not authorized fitness or other reimbursement.
- D. Contractors and volunteers are not eligible for the Wellness Program.

There is no wait period for Wellness Program participation.

10. **Eligible Expenses.**

Eligible expenses include activities undertaken to gain or maintain health and fitness and to participate in an essential part of a health and physical fitness program. The intent of wellness program and fitness activities is to gain and maintain health and fitness (physical and mental) that includes gym memberships, fitness centers, exercise classes, weight loss support groups, health screenings and nutritional classes and information. These activities are designed to improve overall health and morale, allowing for a work/life balance and workforce retention.

Commercial facilities, classes and services must be unsegregated, where membership is not restricted based on race, color, religion, sex, national origin, political affiliation, marital status, disability and genetic information, age, or membership in an employee organization.

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Eligible expenses include:

- A. **Membership Fees to a Fitness Center.** The monthly or annual cost of a gym or other fitness center membership, including any associated initiation fees and annual fees.
- B. **Virtual Fitness Membership.** The monthly or annual subscription cost for an online or virtual fitness service. A virtual or online fitness service must be for a fitness activity that could be performed in person. Reimbursement is allowable only for the fitness class or fitness activity subscription portion of the premium.
- C. **Fees for Participation in Fitness Classes.** Fees for group classes such as step aerobics, Pilates, yoga, spinning, Zumba, aquatics, and kickboxing.
- D. **Smoking Cessation Aids.** Federal Employee Health Benefit (FEHB) plans now offer smoking cessation programs and aids, as do most personal health plans, and should be the primary provider for these services. If there is no coverage, smoking cessation aids may be reimbursed.
- E. **Wellness or Health Maintenance Activities.** Enrollment fees for health and wellness education subscription or courses available to the public, such as weight control/management, nutrition, and activities designed to modify lifestyles to improve health.
- F. **Other Activities Not Specified.** Other wellness programs and fitness activities, not specifically mentioned as included or excluded in this D&S, require prior approval by the supervisor, in coordination with the Regional Wellness and Safety Coordinator(s). Activities and programs must have a wellness/fitness component, be an essential part of a fitness program, and not be personal in nature or inherently dangerous. Before approving wellness/fitness programs or activities not specified in this D&S, supervisors must consider the local availability of eligible activities, ethical and public perception, the needs of the employee, budget, and other approved wellness programs and fitness activities that may meet the specific wellness need.

11. Ineligible Expenses.

Expenses not eligible for reimbursement include but are not limited to the following:

- A. **Products and Services Inherently Personal in Nature.** Products of a personal nature, or for use only by the individual, will not be reimbursed. Examples include, but are not limited to, ski or trail passes or running, skiing or other event entry fees, any portion of a virtual or online fitness service subscription towards ownership of equipment, the purchase of exercise equipment including fit watches and wearable wellness trackers, personal trainers, lessons for recreational activities, diet/fitness books, software, fitness videos, pedometers, shoes/clothing, products used to enhance or maintain performance, chiropractic and acupuncture treatments, biofeedback and hypnosis sessions, laser

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treatments, massages, the purchase of fitness/weight loss beverages, food, prescription medication, vitamins, and nutritional supplements. are ineligible for reimbursement.

- B. **Recreational Activities.** Extracurricular activities that are considered personal in nature, competitive, recreational, or inherently dangerous are excluded for reimbursement. Federal funds may not be used to pay for such activities or sporting or fitness events and fees. Examples include, but are not limited to, adult recreational sports leagues, hockey, skiing (to include ski and trail passes), tennis, roller skating, skydiving, snowboarding, rock climbing, surfing, horseback riding, marathon entry fees, and ballroom dancing.
- C. **Costs Incurred by Family Members.** Only costs for the eligible employee are reimbursable. If an employee has a family or group membership, documentation must be provided showing the cost for an individual member (the employee) and only that amount will be used to calculate the reimbursable amount.
- D. **Time Compensation.** Compensation for time spent participating in individual fitness or wellness activities is not eligible for reimbursement.

12. Excluded Activity Deviation Request.

Individual requests for deviations to fitness activities specifically noted as excluded for reimbursement in this D&S, may be requested by the Regional or Office Director or Deputy Director in writing, to the Deputy Commissioner – Policy, Administration and Budget through the Reclamation Wellness Coordinator. The request must specify the excluded activity, the fitness activity or wellness program benefit to the employee or a specific personal accommodation or need. A Regional permanent deviation from the requirements in this D&S will not be granted.

13. Wellness Agreement.

The Wellness Agreement (Appendix A) and Medical Screening Questionnaire (Appendix B) are required to participate in the Wellness Program and fitness reimbursement component(s).

14. Reimbursement Process.

- E. **Reimbursement Timeframe.** Reimbursement is allowable monthly, quarterly, or annually for fees incurred October 1st through September 30th of the current fiscal year. Reimbursement may only process when a Wellness Agreement (Appendix A) has been approved prior to fitness activity or wellness program or service use.
- F. **Engagement in Eligible Health/Fitness Activities.** Reimbursement is allowable for eligible expenses incurred for activities performed prior to the reimbursement request. Annual gym membership and other costs will be reimbursed from October 1st to the date of the reimbursement request. Advance expense reimbursement is not allowable.

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- G. **Forms and Supporting Documentation.** Each eligible employee requesting Wellness program reimbursement must complete and submit the following to the Regional Wellness Coordinator for reimbursement anytime, but no later than September 30th of the current fiscal year:
- (1) **Reimbursement Request.** A completed and supervisor approved Fitness Reimbursement Request form (Appendix C) explaining the wellness activity and costs.
 - (2) **Receipts.** Appropriate receipts supporting the Fitness Reimbursement Request. An acceptable receipt is a vendor document that includes the facility/vendor's name, the name of the employee, expenses, period covered by receipt, and the dollar amount paid (copies are acceptable). If dues are paid by auto-withdrawal, a copy of the bank or credit card statement with specific payee facility/vendor name may be submitted as proof of payment. The employee must remove all personally identifiable information on the statement except for the name of the employee, the name of vendor and financial institution, and the line item that shows the payee and charge.
 - (3) **Report of Taxable Fringe Benefits.** A completed IBC Report of Taxable Fringe Benefits form (Appendix D). Note: when completing the form, the calendar year in which the reimbursement is made is the year entered on the line "Taxable Income to be Reported in Tax Year" and not the calendar year of participation.
 - (4) **Maintain Original Paperwork.** The supervisor or designee, maintain the original reimbursement paperwork. The employee and Regional Wellness Coordinator may receive and maintain a copy of the documents.
 - (5) **Reimbursement Processing.** After the request and forms for reimbursement are reviewed and processed, the Regional Wellness Coordinator will forward the request to the IBC Payroll Operations Division, Attention: D-2663 via email to POD_POB_WIP@ibc.doi.gov for reimbursement processing.
 - (6) **Direct Deposit.** The Payroll Operations Division has two pay periods to process wellness/fitness reimbursements. Reimbursements will be deposited into the employee's bank account as part of their paycheck and listed as "Fringe Benefit" on the Leave and Earnings Statement.

15. Tax Liability.

All reimbursements made under the Wellness Program are taxable income to the employee. The calendar year in which the reimbursement is made is the year entered on the line "Taxable Income to be Reported in Tax Year" and not the calendar year of participation.

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16. **Review Period.**

The originating office will review this release every 4 years.