



Phillips 66 Fitness Reimbursement Subsidy FAQ

Q. Who is eligible for the program?

A. All active U.S. employees (including Union employees and ex-pats) PLUS dependents (spouse/partners and children aged 13-26) covered by a P66 sponsored medical plan.

Q. I am a part-time employee. Am I eligible to participate?

A. All employees eligible for the medical plan are eligible for the program.

Q. Am I eligible for reimbursement while I am on leave?

A. No. This benefit is available to active employees currently at work.

Q. As a newly hired employee can I take advantage of the full \$300 for the year?

A. New employees can take advantage of the full amount for the calendar year as long as expenses are incurred on or after the date of hire.

Q. What expenses are eligible for reimbursement under the program?

A. The program allows for reimbursement of 100% (up to \$300) of your dues and membership fees. You can find a detailed list of the expenses at www.wageworks.com. Follow the “Eligible Expenses” link once you are logged into your account.

Q. How do I setup an online account for my dependent(s)?

A. Dependent accounts can be setup at www.wageworks.com. Under the “Log In/Register” tab, select “Employee Registration” from the drop down menu. You will be asked to validate 5 pieces of information:

The screenshot shows a web form titled "FIRST-TIME USER" with a date of "August 25, 2013". The form is titled "Identify Yourself" and has a progress indicator with five dots, the second of which is filled. The form fields include: "First Name", "Last Name", "Date of Birth" (with a note "MM/DD format"), "Home Zip Code", "ID Code", and a CAPTCHA field labeled "Enter the moving letters seen in the box below" with a box containing the letters "WWT". To the right of the ID Code field, there is explanatory text: "Your ID Code is the last 4 digits of one of the following: - Your social security number, - Your employee number, - Code provided by your program sponsor." Navigation buttons for "BACK" and "NEXT" are present at the top and bottom of the form.

- Dependent First Name
- Dependent Last Name

- Dependent Date of Birth (MM/DD)
- Dependent Home Zip Code
- Dependent ID Code (last 4 digits of dependent(s)' SSN#(s))

Q. How do I setup an online account as an employee?

A. Dependent accounts can be setup at www.wageworks.com. Under the “Log In/Register” tab, select “Employee Registration” from the drop down menu. You will be asked to validate 5 pieces of information:

The screenshot shows a web browser window with the title "FIRST-TIME USER" and the date "August 25, 2013". The page is titled "Identify Yourself" and has "BACK" and "NEXT" buttons. The form contains the following fields and instructions:

- First Name: [Text Input]
- Last Name: [Text Input]
- Date of Birth: [Text Input] (MM/DD format)
- Home Zip Code: [Text Input]
- ID Code: [Text Input]
- Enter the moving letters seen in the box below: [Image of CAPTCHA with letters W, N, T]

Additional text on the right side of the form states: "Your ID Code is the last 4 digits of one of the following:

- Your social security number.
- Your employee number.
- Code provided by your program sponsor.

- First Name
- Last Name
- Date of Birth (MM/DD)
- Home Zip Code (if you are an expat you should use the P66 corporate zip code)
- ID Code (last 4 digits of your 8 digit EEID#)

Q. I am participating in the FSA and already have an online account. Can I use this same account for my eligible fitness expenses?

A. Yes. Employees will manage the FSA and their individual fitness benefit under one account. You can use the same username and password to manage both programs. However, you will need to create an online account for any eligible dependents for the fitness program.

Q. What is the ID Code?

A. The ID code is the number that identifies you and your dependents in the WageWorks system. As an employee, your ID code is the last 4 digits of your 8 digit EEID#. Your dependent(s) is/are identified by the last 4 digits of their SSN#(s).

Q. Why does the WageWorks First Time Registration process give me an option to setup reimbursements via check or direct deposit?

A. Your reimbursements will be issued via payroll; however, if you are participating in the FSA your reimbursements are issued via check or direct deposit.

Q. Where should I submit my claims?

A. You can submit your claim directly to WageWorks, online, through the EZ Receipts Mobile App, by faxing (877) 353 -9236 or mailing (Claims Administrator, PO Box 14053, Lexington, KY 40512) a

fitness reimbursement claim form directly to WageWorks.

Q. How do I submit a claim online?

A. Follow the “Submit Receipt or Claim” link to submit your expenses online. Note: Claims for your dependent(s) must be submitted separately under their account.

Q. How do I submit online claims for my dependents?

A. Expenses can be submitted online or by downloading a claim form by following the “Submit Receipt or Claim” link.

Q. What documentation is required for reimbursement?

A. You must submit a receipt with each claim. Documentation may include a receipt, credit card/bank statement, document on fitness club letterhead, or any other official documentation. The following information must appear on the receipt:

- (1) Employee or dependent name (can be written on receipt),
- (2) Name of service provider (printed on receipt),
- (3) Description of service (can be handwritten on receipt),
- (4) Payment amount (printed on receipt),
- (5) Service date (if service date/period is not available, then payment date can be used).

Q. What happens if I submit my claim using service dates vs. a payment date?

A. If service dates are entered in lieu of the payment date, the claim will be prorated over the number days in the service period.

Q. When will I receive my reimbursement?

A. Payments will be made monthly through Phillips 66 payroll. If you and/or your dependent(s)' claim(s) is approved by the 1st of the month, generally you will receive your reimbursement by the end of the month. Otherwise, you will receive your reimbursement at the end of the following month. Reimbursements are considered taxable per IRS Guidelines.

Q. What is the deadline for submitting a claim?

A. Expenses must be submitted no later than March 31 of the following year (as evident by a postmark or fax receipt).

Q. Where do I view claims information for my dependent(s)?

A. You can view claims information at www.wageworks.com under your dependent(s)' individual online account(s). Dependent claims for the fitness credit will not be visible under the employee account.

Q. Can I submit claims for my dependent(s) under my own individual account?

A. No. Your dependent claims will be denied if they are submitted under the employee account. They need to be submitted separately under the dependent account.

Q. What ID code do I use if I am a Phillips 66 employee and the spouse of a Phillips 66 employee?

A. The ID Code for all Phillips 66 employees is the last 4 digits of your EEID. All employees will have separate accounts for submitting claims, regardless of whether or not they are a spouse under another Phillips 66 employee's medical plan.

Q. When I receive the fitness reimbursement in my paycheck, will the amount be net of taxes?

A. Taxes will be deducted to comply with IRS regulations. The reimbursement payment will be identified on your paycheck as FitnessCredit.

Q. What happens if a claim is approved before I am terminated?

A. Phillip 66 cannot process payments to terminated employees for claims approved prior to termination.

Q. If I submit a claim for \$300 in eligible expenses will I get the full \$300 reimbursed?

A. Yes. Claims are processed at 100% so you would be eligible for the full \$300.00.

Q. How do I submit expenses incurred in non-US locations?

A. For expenses incurred in non-US locations, please ensure that claim form is completed in English; receipts submitted in other languages will be accepted, however, they should be translated into English. All expenses must be submitted in U.S. Dollars on the receipt and the claim form.

Q. Can I use the EZ Receipts mobile app to submit my fitness credit expenses?

A. Yes, the EZ Receipts mobile app now supports fitness claims as well as FSA.

Q. How do I submit my gym fees when they are part of a family membership?

A. If you submit receipts for anything other than your single membership, such as a dual or family membership, please provide a per person amount. Dependent expenses must be filed separately.