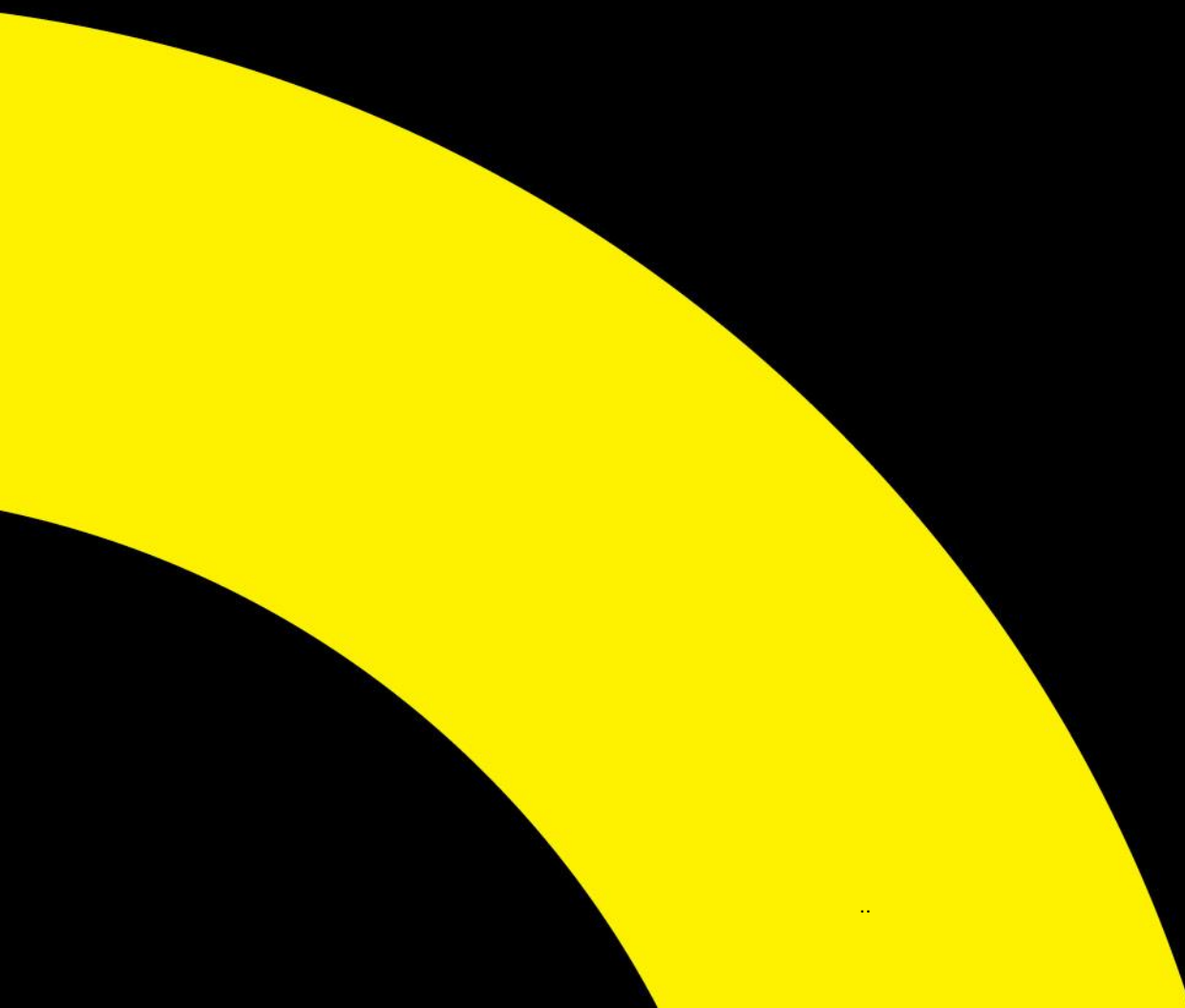




# **Phillips 66 2020 Fitness Reimbursement Frequently Asked Questions (FAQs)**

January 2020



## **Q. Who is eligible for the program?**

A. All active U.S. employees (including employees covered by a collective bargaining agreement, and expatriates) PLUS their dependents (spouse/partners and children) covered by a Phillips 66-sponsored medical plan.

## **Q. Can all employees take advantage of the full \$500 for the year?**

A. U.S. payroll employees who complete all the following gateway activities prior to November 30, 2020 will be eligible to submit reimbursements.

- Submit biometric screening results; AND
- Obtain BMI of less than 30 or consult with a primary care physician; AND
- Obtain blood pressure of less than 140/90 or consult with a primary care physician.

## **Q. When can I access my Fitness Reimbursement information on UPoint?**

A. The Fitness Reimbursement tile will be displayed after the three (3) gateway activities have been completed and eligibility sent to Alight.

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

A. The program allows for reimbursement of 100% (up to \$500) of your family's fitness-related expenses. You can find a detailed list of the expenses at [digital.alight.com/phillips66](https://digital.alight.com/phillips66). Select "Reimbursement Account" then link to Fitness Plan.

## **Q. I am participating in the Flexible Spending Account (FSA) and already have an online Smart Choice Account. Can I use this same account for my eligible fitness expenses?**

A. Yes. Employees will manage the FSA and their fitness benefit through one account. You can use the same username and password to manage both programs.

## **Q. Where should I submit my claims?**

A. You can submit your claim through the following methods.

- Online through the Smart-Choice Accounts Mobile App; or
- Upload directly to the UPoint website; or
- Fax to 855-673-6719; or
- Mail a fitness reimbursement claim form directly to Smart-Choice Accounts, PO Box 660114, Dallas, TX 75266.

## **Q. How do I submit a claim online?**

A. To submit an online claim, go to [digital.alight.com/phillips66](https://digital.alight.com/phillips66), access the Fitness Reimbursement plan under Reimbursement Account, then follow 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); and
- (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 of days in the service period.

## **Q. When will I receive my reimbursement?**

A. Payments will be made through Phillips 66 payroll. If claim(s) is/are 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 2020 claim?**

A. 2020 Expenses must be submitted by Nov. 30 of the same year (as documented by a postmark or fax receipt).

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

A. Yes. Your dependent claims will be processed under the employee account.

**Q. When I receive the fitness reimbursement in my paycheck, will taxes be deducted from the claim amount?**

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

**Q. If I submit a claim for \$500 in eligible expenses, will I get the full \$500 reimbursed?**

A. Yes. Claims are processed at 100% so you would be eligible for the full \$500. Keep in mind that these paychecks will reflect that the appropriate taxes have been withheld as part of your W-4 federal and state tax withholding elections.

**Q. How do I submit expenses incurred in non-U.S. locations?**

A. For expenses incurred in non-U.S. locations, please ensure the 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 Smart-Choice Account mobile app to submit my fitness expenses for reimbursement?**

A. Yes. The Smart-Choice Accounts mobile app supports fitness claims as well as FSA claims.

**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 only to active employees currently at work.