THE STEPPING STONES GROUP

Transforming Lives Together

Wellness and New Hire Policies

Finance Reimbursements Reference Guide 26/27 School Year

Attached: Reimbursement Policy, New Hire Letter, Wellness Letter, and Reimbursement Tracking Procedure

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Reimbursement Policy

SSG's reimbursement plan is based on complete expense reports and clear, compliant documentation provided by the employee ensuring reimbursements meet IRS guidelines.

Reimbursements are paid out via reports submitted in **Concur.** We do **not** reimburse receipts sent to Finance Reimbursements through email.

Only receipts 07/01/26-06/05/27 are eligible. Deadline for Submission: 06/05/27 for the 26/27 school year.

To sign into your Concur account, follow this link: https://www.concursolutions.com or download Concur's mobile app.

To facilitate timely reimbursement and ensure deadlines are not missed, please submit expense reports 30 days after purchases are made (up to 60 days at the latest).

Clear, complete receipts are *required* for reimbursement of *all* expenses to remain compliant with IRS guidelines. ***An incomplete/missing receipt or proof of payment will result in the inability to be reimbursed. There are no exceptions to this rule*.**

Receipt Images **must** meet the following criteria. ***If any of these items are missing from documentation, your report will be sent back requiring changes.***

Merchant/Vendor
Date of purchase
Itemization with cost of each item
Total paid
Method of payment

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Reimbursement of New Hire Expenses

Below is a concise list of expenses reimbursable as New Hire. Direct any questions of item eligibility to the Finance Reimbursements Team at finance.reimbursements@ssghealthcare.com

Eligible NEW HIRE Expenses
Background Checks
CPR Certification
Fax Related Costs
Fingerprints
Live Scan
Mail Cost
Notary Fees
Transcript
TB Skin Test
Mandatory Reporter Training

*Licensing fees and certifications are NOT New Hire expenses. They are only eligible for reimbursement using PDA budget

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Wellness Policy

We are pleased to provide employees with our $200 wellness benefit, offered to promote wellness through fitness. To receive your benefit, submit your eligible expenses (first paid for out-of-pocket) for reimbursement via Concur.

Only receipts dated 07/01/26—06/05/27 are eligible. Deadline for Submission: 06/05/27 for the 26/27 school year.
Wellness/PDA budgets must be used within your period of employment. It cannot be used prior to your assignment start date, nor after your employment with SSG ends.

Direct any policy, eligibility or deadline questions to the Finance Reimbursements Team: finance.reimbursements@ssg-healthcare.com
***Finance reimbursement reserves the right to decline eligibility of an expense at any time to maintain the integrity of our policy.**

Eligible Expenses

Membership program fees for fitness clubs, gyms, yoga/pilates studios, aquatic centers

- Single membership for you, the employee. Family/partner memberships not eligible

Race Registration

- Registration ONLY. Added costs for shirts/caps/clothing not eligible

At-home Fitness and/or Meditation classes/subscriptions

- Apple Fitness
- Peloton
- Yoga/Pilates
- MyFitnessPal

Weight Loss Program fees

- Weight Watchers annual fees (NO food/drink/medication)
- Noom

At-Home Cardio Equipment

- Treadmill
- Walking pad
- Elliptical
- Exercise bike
- Stepper/Climbing machine
- Bicycle (NO ebikes)

Sports Equipment

- Kayaks
- Paddle boards, surfboards

- Racquets
- Skis/ski boots
- Golf clubs

Athletic shoes

- Nike, Adidas, Hoka, On, etc.
- MUST be closed-toe. No clogs or sandals

Athletic Tracker

- Fitbit
- Apple/Google Watch
- Garmin
- Oura Ring, RingConn

Strength Training

- Dumbbells
- Kettle weights
- Benches/Racks
- Resistance bands
- Weight Training gloves

Core Equipment

- Yoga mats
- Medicine balls
- Foam rollers
- Twist machine

Single Massage

- Single-purchase massage is eligible. NO massage/spa memberships eligible
- NO scalp or foot massage

Daily Vitamin Supplements

- Will accept Vitamins in chewable, liquid, pill/capsule form.
- NO powders
- NOTHING prescribed by a doctor, NO medication

Ineligible Expenses

Medical Appointments and/or Medications of any kind

- Dentist
- Doctor
- Optometrist
- Physicals
- Health Screenings
- Anything covered by Flex Spending/Medical Insurance
- Items approved for medical use with Letter of Medical Necessity by your medical provider
- Rehab, PT/OT

Unconventional or Alternative Medine

- Acupuncture/Acupressure
- Reiki
- Chiropractor

- Art Therapy
- Hypnosis
- Red Light Therapy/Red Light Therapy at-home devices (e.g. Red Light Face Mask)

Mental Health
- Therapy/Therapy groups
- Counseling
- Personalized Wellness Centers/Retreats

Weight Management treatments
- GLP-1s (e.g. Ozempic)
- Zepbound
- Mounjaro
- Hers/Hims

FSA eligible items
- Medical equipment, including First Aid care
- Skin and sun care
- Eye and Dental care

Dietary
- Supplements/Protein powders
- Coffee, tea, Mushroom products, Immune Support
- Protein/Nutritional Soda, energy drinks
- Food plans/home delivery services
- Gut cleanses/Detox
- Fiber products
- IV Hydration

Spa/Salon
- Entrance/Membership fees
- Spa/Salon gift cards or Groupon
- Manicures or pedicures
- Facials
- Hair/Skincare appointments
- Scalp/foot massage
- Hair/Facial/Skincare Products
- Massage/Salon Memberships
- Personal Hygiene Products

Clothing
- Workout clothes/clothing of any kind
- Swimwear/Swimcaps/Goggles
- Fashion shoes/clogs/sandals
- Socks
- Outerwear

Furniture
- Desks
- Chairs

Miscellaneous

- Vibration Plate
- Massage gun
- Heat therapy
- Bowling balls
- Groupon (neither the purchase of nor redemption)
- Gift certificate/Gift card
- Kids’ athletic equipment
- Lyft Bike Share Program

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Reimbursement Payment Tracking Procedure

To keep up with your budget balances

From Concur's home screen, choose the Reporting icon from the menu in the top left and click Budget Dashboards. You will then see a screen with a window for both your PDA and Wellness budgets. Clicking on the 3 dots in the top right corner of either budget window will give you the option to view that budget's details.

Payment Tracking

It generally takes 7-10 days to receive payment once a report is approved. But Concur will notify you that your reimbursement has been PAID once your Report goes into Processing status.

Your reimbursement will appear in your bank account separate from your normal paycheck.

To track the payment status of your Reports in Concur:

From the Home screen, click the Home dropdown and choose Expense.

There, you will be able to manage your expenses. Make sure you choose This Year from the View dropdown to see approved reports ready for payment.

Click on the Report you want to view.

From there, click the Report Details dropdown and choose Audit Trail if you want to see when your Report was in various statuses, or Report Payments to see your payment status and *estimated* payment date.

If you do not see the payment 10 days after the estimated deposit date, please contact your bank, as we have sent the funds. Concur does not have authority over bank recovery procedures. Once funds have been transmitted, the resolution is fully in the hands of the financial institutions involved.

NOTE: If your banking information in your Concur profile is incorrect, your payment status will show the bank Returned your deposit. You will need to update your banking information in Concur and when we make the next payment, Concur will retry to deposit funds. **Do not resubmit your report**.