

Trilogy is making your health and well-being a top priority by providing a Lifestyle Spending Account (LSA). LSAs are a new type of benefit that can help you stay on track with your physical, emotional, and financial wellness goals. Effective April 1, full and part-time employees will have the ability to earn quarterly incentives by completing activities through Virgin Pulse. You can earn up to \$75 per quarter or a total of \$225 this year. Instead of Virgin Pulse Cash, your earnings will be deposited into your LSA at Bank of America (BoA). With an LSA, you can pay for a wide range of wellness-related purchases—from gym memberships to annual park passes—with money Trilogy deposits in your account.

How it works!

1. Complete activities in Virgin Pulse and earn up to 15,000 points (\$75 LSA dollars) each **quarter**.
 2. Achieve Levels 1, 2, 3, and/or 4. Levels worth \$10, \$15, \$20, \$30 respectfully.
 3. Receive an LSA deposit for the level achieved **at the end of each quarter**.
 4. Use your LSA funds to reimburse yourself.
- Any Virgin Pulse balances over \$30 as of March 31, 2023 have moved to your LSA at BoA. If you had less than \$30 VP Cash as of March 31, 2023, those funds were forfeited and a LSA account was not created. A LSA account is created by BoA only when funds are earned.
 - Who is eligible to earn LSA dollars? All PT and FT employees
 - How do I access my LSA dollars? Via BoA site: myhealth.bankofamerica.com or call BoA at 866-791-0250. **A debit card will not be issued.**
 - When will I see the LSA contribution that I earned in Virgin Pulse in my LSA account? At the end of each quarter (July 2023, October 2023, January 2024).
 - What do I need to do to use my LSA dollars? <https://healthaccounts.bankofamerica.com/how-to-use-your-lsa.shtml>

Filing a Claim to receive your Reimbursement



Member website

- From the Home screen select "Send Payment" or "Reimburse Myself" and follow the on-screen instructions to complete the submission process



MyHealth app

- Select "File a Claim" > "Add a New Payee" or "Pick a Payee"
- From the Home screen select "Send Payment" or "Reimburse Myself" and follow the on-screen instructions to complete the submission process
- Upload your receipt > "Submit"
Note: When you use a receipt from the Receipt Organizer it will display with a green "Used" indicator at the top right.



Mail or fax

- Download the Reimbursement Request Form from the member website: "Tools & Support" > "Account Support & Forms"
- Fill out the form.
- Fax or mail it to Bank of America.

Deadlines for filing claims

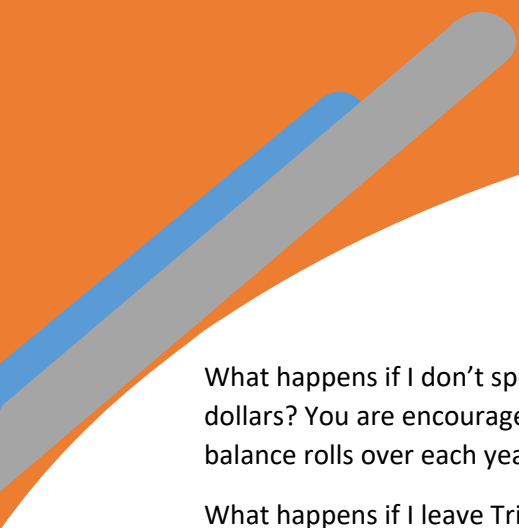
For details on filing deadlines, find your plan in the "Accounts" section on the homepage. Hover mouse over the information icon to the right of the plan name and a pop-up will appear showing you the key dates for your account.

What can my LSA dollars be used for?

PHYSICAL WELLNESS	FINANCIAL WELLNESS	EMOTIONAL WELLNESS
<ul style="list-style-type: none"> - Athletic equipment - Gym memberships - Fitness classes - Fitness trackers - Entry fees for marathons - Nutritional supplements 	<ul style="list-style-type: none"> - Down payments and closing costs - Financial planning services - Walmart Plus / Amazon Prime - Groceries - Rent / Mortgage 	<ul style="list-style-type: none"> - Marital / parental counseling - Pet care - Camping equipment - Personal development classes - Childcare

How are the LSA dollars taxed? Your LSA is funded by Trilogy and the money you spend is considered taxable income. You should see the benefit itemized on your payroll stub with applicable taxes withheld when funds are spent.

<https://healthaccounts.bankofamerica.com/lisa-fqs.shtml#:~:text=Do%20I%20have%20to%20pay,stub%20with%20applicable%20taxes%20withheld.>



What happens if I don't spend my LSA dollars or is there a timeframe on when I have to spend my LSA dollars? You are encouraged to spend your funds in the calendar year they are deposited. However, the balance rolls over each year.

What happens if I leave Trilogy, where will my LSA dollars go? *Employees will have 30 days after termination to file claims that were incurred while employed.*

Who do I contact if I need help with my LSA account? BoA 866-791-0250

Timeline of LSA Funding

LSA Accounts are opened once there is a balance to transfer.

Points earned in the below months:

April through June: **will be available in your account in July.**

July through September: **will be available in your account in October.**

October through December: **will be available in your account in January.**

