CHAKRA HOURS

FOR HR AND BENEFITS TEAMS
DALLAS-FORT WORTH ONSITE · LIVE ONLINE NATIONWIDE

WELLNESS FUND GUIDE

Use your wellness fund for *live stress and resilience sessions.*

Many medical plans include a wellness fund or credit that the carrier reimburses and that expires at the end of the plan year. Here is how to check yours, what to ask, and what we send so the claim is simple.

Three steps

1. **Find out what you have.** Ask your benefits broker or your carrier account manager whether your plan includes a wellness fund or credit this plan year, how much remains, and the last date services can take place.
2. **Confirm the session qualifies.** Fund rules commonly name stress-management education offered to all employees. Morale and entertainment activities are usually excluded, so we describe each session by what it teaches.
3. **Book, then claim.** We deliver the session and send an itemized invoice built to the carrier's requirements (sample on page 2). You submit it for reimbursement before the carrier's claim deadline.

What we send you

- ✓ **An itemized invoice** with session dates inside your plan year
- ✓ **Participants per session** and cost per employee
- ✓ **A session description** stating the educational content
- ✓ Confirmation the session was open to all employees
- ✓ W-9 and a certificate of insurance on request
- ✓ A one-page recap of the session for your records

Timing to watch

- ✓ **Calendar-year plans** usually end December 31; services must happen in the plan year
- ✓ **Claims are often due soon after**: one major carrier asks for invoices within 30 days of the plan year's end
- ✓ **Other plan years** (for example October 1) run to their own end date
- ✓ New funds are usually set at renewal, so plan next year's sessions then

A note you can send to your broker or carrier

Hi [name], does our medical plan include a wellness fund or credit for this plan year? If so, how much remains and what is the last date for eligible services?

We would like to book a live stress-management education session for all employees with Chakra Hours (onsite or online). They provide an itemized invoice with dates, participants, and cost per employee. Can you confirm this qualifies and tell us what documents you need for reimbursement?

Sessions that fit a remaining fund

- ✓ Office Reset or Walking Reset, onsite, $900
- ✓ Live sound bath, onsite, $1,200
- ✓ Live online session, anywhere in the US, $695

Plan the whole year

The Stress and Resilience Program combines four dated onsite events with twelve monthly live online sessions for every employee. Ask us for a quote sized to your team and your fund.

Each carrier sets its own rules, amounts, and deadlines. Chakra Hours does not determine eligibility or promise reimbursement; please confirm with your broker or carrier before booking.

CHAKRA HOURS

Invoice

ITEMIZED FOR WELLNESS FUND REIMBURSEMENT

SAMPLE FOR ILLUSTRATION

BILL TO
Your Company, Inc.
Attn: Benefits Manager
Dallas, TX

PLAN
Medical carrier: [your carrier]
Plan year: Jan 1 to Dec 31, 2026
Wellness fund or credit

INVOICE
No. CH-2026-SAMPLE
Date: December 10, 2026
Terms: NET-30
Due January 9, 2027

DATE	SERVICE	PARTICIPANTS	COST PER PARTICIPANT	AMOUNT
Dec 9, 2026	**Live stress-management education session, onsite** Guided relaxation with live sound (gongs, crystal bowls) and breathwork instruction, 45 minutes. The Workday Reset Method™, Reset module: three stress-reset techniques employees can use at their desks. Open to all employees.	20	$60.00	$1,200.00
Dec 9, 2026	**Live online stress-management session (Zoom)** The Workday Reset Method™, Lesson 1, about 30 minutes, for remote and hybrid staff. Open to all employees.	34	$20.44	$695.00

For your claim

- ✓ All sessions took place within the plan year shown
- ✓ Each session was offered to all employees
- ✓ Content: stress-management education based on The Workday Reset Method™
- ✓ Participant counts are headcounts; no names or health data collected

Sessions	**2**
Total participants (all sessions)	**54**
Cost per participant	**$35.09**
Employees eligible (offered to all)	**150**
Cost per eligible employee	**$12.63**
Total	**$1,895.00**

Pay by card or ACH (link on the emailed invoice), or by check to Chakra Hours. W-9 and certificate of insurance available on request. This sample shows the format only; amounts, dates, and counts are illustrative.