

Welcome to the all-in-one platform for your **Wellness Account !**

Employees Eligible:

Full Time Employees (\$100 monthly)

Regular Part Time Employees (\$50 monthly)

Effective Date:

1st of the Month Following 90th Day

Eligible Expenses Include:

Day Care

Tuition Reimbursement

Gym Membership

Gas

Groceries

Health and Wellness Items

(Including Hair appointments)

Getting started

Forma is home to your Wellness Account.

Check your account balance, browse for eligible purchases, and track your transaction history, all in one place. Simply log in to Forma to get started.

Frequently used tools



On the menu bar, click on the **Account** button to bring up information including your available balance, expiration, and renewal.



Forma Store gives you access to pre-vetted products and services that you can spend the subsidies on. No reimbursements needed!



Click on the **Profile** icon to bring up your settings, profile, and transaction history, including past orders and pending reimbursement claims.



On the lower right corner, our **Member Experience Team** is one click away to assist with anything you may need.

Ways to spend

Forma Store

Forma Store offers a list of curated and verified products. Simply log into your Forma account to browse 100+ products and services.

- + Enjoy up to 30% off of retail price.
- + No reimbursement claims are required!
- + Orders are fulfilled and serviced by Forma .

Forma Virtual Card

Forma Virtual Card offers a convenient way to spend on purchases outside of the Forma Store. All benefits accounts are programmed into one card. Activate your card in the account with just a few clicks.

- + Transactions automatically verified at POS
- + Available for use anywhere Visa cut is accepted
- + No reimbursement claims required

Reimbursement Claims

Reimbursement Claims are also available in the app for any out-of-pocket eligible expenses. Make sure to keep the receipt for verification!

- + A simple claims form is available in-app and on mobile.
- + Get approved in 1–2 days.
- + Approved funds are paid out via direct deposit.

Access Forma

On the 1st of the Month following your 90th day: Access FORMA by navigating to <https://client.joinforma.com>

You must use the same personal email address used on Paylocity

