



# Healthy Workplace Initiatives Program Funding Guide

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## IMPORTANT DATES

<b>April 29, 2025</b>	Funding period starts
<b>February 23, 2026</b>	<b>Optional:</b> deadline to send all invoices/ receipts/ general ledgers for reimbursement before the end of the funding round. <b>Only if your department requires a partial reimbursement before the end of the fiscal year</b>
<b>May 3, 2026</b>	Complete your initiative. Gather all reimbursement documents for reimbursement
<b>June 3, 2026</b>	The funding period ends. Submission Deadline for all invoices, reports, and surveys are due

# RUNNING A SUCCESSFUL HEALTHY WORKPLACE INITIATIVE

## ***Getting started***

- Connect with your manager or senior leaders about the HWIP initiative and ask them to promote and participate. This is an excellent opportunity for leaders to show their commitment to wellbeing. Senior leaders' involvement can also generate interest and inspire others to join the initiative.
- Enlist support from others to help coordinate or set up activities.
  - If your department has a wellbeing/wellness committee, this may be a good place to start or enlist the support of those who are already interested in supporting wellbeing in your department. Create a small working group or planning committee to share the workload
  - Connect with a [Workplace Wellbeing Ambassador](#) in your department or Social/ engagement committee if you have one.
- Plan early and think beyond one-off events
  - Consider the different seasons and workload of the team. For instance, you can organize one activity or workshop per season (Fall, Winter, Spring, Summer)
- Brainstorm ideas and obtain feedback from those participating in the initiative. This gives a chance to voice ideas, increase buy-in and generate interest in the team.
- Consider how this initiative can be integrated into ongoing programming, processes, or initiatives (e.g., team meetings, Pro-D workshops, strategic sessions).
- When planning, take into account accessibility, ease of access to workshops and activities, dietary restrictions, and catering to varying physical abilities
- Include an educational component
  - If you are hosting a nutrition or food related event, consider bringing in a dietitian or nutritionist, or contact the Workplace Wellbeing team to provide free workshops and resources
  - The [Workplace Wellbeing team](#) also offers free training, on-demand workshops and consulting services

## ***During your initiative***

- Get feedback from participants and monitor your progress
  - Check in regularly with your team to discuss progress and determine what is working or what could be improved. Review, adjust, and modify the plans. Having data can also be sent to managers and leaders to promote their continued support of the initiative
- Provide incentives to garner interest, but also recognize participation

## ***After***

- Celebrating team achievements and success
  - Take time to celebrate your success, both big and small.
  - You may wish to host a wrap-up event or post the success of your initiative and activities so that everyone in the department can see it

# PROGRAM EVALUATION

Evaluation of health promotion initiatives is an important step to long-term success. Evaluation can help identify ways to improve programs, justify the use of resources, assess an intervention's efficacy and help identify outcomes.<sup>1</sup>

## HR’s Evaluation

As part of the Healthy Workplace Initiatives Program, you will be required to submit evaluation surveys.

<a href="#">Participant Post-Survey</a> (Minimum of 10 to be submitted): upon completion of your initiative
<a href="#">Final Report</a> : completed by application leads only, at the end of your programming.

## Your Department’s Evaluation

Participating departments are strongly encouraged to do their own evaluation throughout a Healthy Workplace Initiative Program. The feedback collected by HR relates to individual health behaviours, not program specifics.

Surveying your group will help to assess the program’s rollout, popularity, viability and future sustainability. You will find a sample Department Evaluation as part of this toolkit.

<sup>1</sup> O'Connor-Fleming ML et al., A framework for evaluating health promotion programs. Health Promotions Journal of Australia (2006), 17(1):61-66.

# HWIP REIMBURSEMENT GUIDELINES

To get reimbursed through the Healthy Workplace Initiatives Program (HWIP), please follow the steps below. If anything is missing (like receipts or the coversheet), your package will be returned for you to complete.

## Pay for your HWIP expenses

- Submit your receipts to your department first (e.g., through your department's admin or finance team).
- Make sure each invoice or receipt clearly says it is an HWIP expense (e.g. HWIP catering expense) in the notes or memo section when submitted

## Reimbursement Instructions

### 1. Complete the provided Cover Sheet (send as an Excel file)

- Use the cover sheet template provided to you.
- **Fill out all the blue spaces—this includes:**
  - Your department's Workday codes (Program Code), this is where your reimbursement from HR will be sent
  - Receipt/invoice details
  - HWIP Funding Category
  - Approved Amount, etc.

Healthy Workplace Initiatives Fund Program Coversheet								
Please fill in all the spaces in blue								
1. All Budget Reports, receipts and General Ledger screenshots MUST be provided in order to be reimbursed.								
2. Number and scan receipts (match each transaction with corresponding receipt)								
3. Do not combine receipts into one budget item; report them individually								
HWIP Funding Period	2025-2026				Description	Max	GL Total	Check
Department/Unit Name (in full)					Prizes/incentives	Prizes	\$0.00	OK
Your Department's Cost Center					Food	Food	\$0.00	OK
Your Department's Worktag					Promotional material	Promotional material	\$0.00	OK
					Transportation/mileage	Transportation/mileage	\$0.00	OK
					Small equipment	Small Equipment	\$0.00	OK
					Health & Wellbeing Apps	Health & Wellbeing Apps	\$0.00	OK
HWIP Funding Category:	Select your HWIP initiative				Guest instructor or facilitator	No max	\$0.00	
Approved Amount:					Room rental	No max	\$0.00	
					Educational workshop costs	No max	\$0.00	
						Total	\$0.00	
						Remaining HWIP:	\$0.00	
					From General Ledger Report in Workday- See example			
Receipt #	Invoice Date (DD/MM/YYYY)	Name of vendor	Description (select from drop down menu)	Invoice Amount	Ledger Account	Ledger Amount (translated debit amount )	Spend Category	Note
0	29/4/2025	Amazon	(e.g. Prizes/incentives, food, facilitator fee, etc.)	\$ 64.94	6300:Supplies and Sundries	\$ 63.00	Office Supplies	
1								
2								

### 2. Gather receipts/invoices

- Label each receipt clearly (e.g., Receipt #1, Receipt #2)

### 3. Ledger Report of Expense Items from Workday ( in Excel coversheet)

**Ask your department's finance department or supervisor to download the Ledger Summary – Distributed Report entries for your HWIP claim only (this shows what was paid and when).**

- The Ledger Summary – Distributed report shows the summary of transactions (Actual Revenue and Expenditures) in Workday
- Only include ledger entries related to HWIP expenses in the sheet labelled '2. Ledger Summary'
- Ensure each receipt/invoice matches a line in the ledger report and coversheet. If Receipt #1 in the coversheet is for a guest facilitator, ensure the same appears as #1 in the Ledger summary sheet.**

Receipt #	Journal	Journal Source	Accounting Date	Budget Date	Ledger Account	Fund	Cost Center	Driver Worktag	Translated Debit Amount
Receipt 0-example	Operational Journal: UBC The University of British Columbia - 2024-08-01	Expense Report	8/1/2024	29/4/2025	6300:Supplies and Sundries	FD000 General Purpose Operating	CC00000 Workplace Wellbeing   VP Human Resources	PM00000 Workplace Wellbeing   VP Human Resources	\$ 63.00
Receipt 1									
Receipt 2									
Receipt 3									
Receipt 4									
Receipt 5									

**Submit your reimbursement package to [ubcempl-g-hwip@mail.ubc.ca](mailto:ubcempl-g-hwip@mail.ubc.ca).**

**Your reimbursement may take 6 to 8 weeks to process, provided all required documents are submitted correctly.**

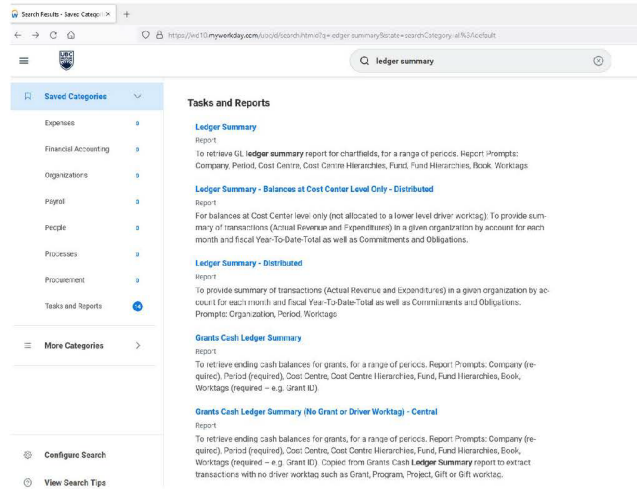
- Your package should include:
  - ✓ Copies of all receipts/invoices
  - ✓ Completed coversheet
  - ✓ Workday ledger report for all claims only



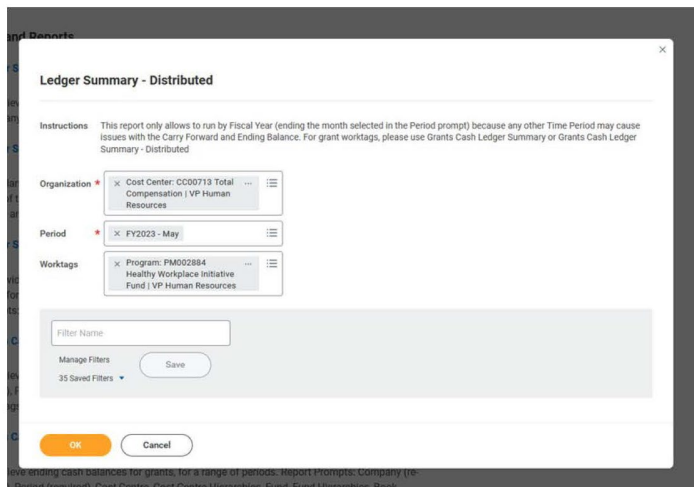
## Appendix: How to pull ledgers from Workday

### Reimbursement Guidelines : General Ledgers

#### Step 1: Search for Ledger Summary – Distributed Report



#### Step 2: Enter Worktags (Cost Center, Period, Program/Grant/Project/Gift/Gift Initiative/Activity)





### Step 3: Select any amount in blue (either for month or Year-To-Date Total)

**Ledger Summary - Distributed**

Organization: Cost Center: 2000-10 Jctra: Compensation | VP Human Resources      Worktype: Program: M222864 Healthy Workplace Initiative Fund | VP Human Resources

Period: FY2023 - May

12 Rows

Ledger Account	Actual Expenses					Commitments Balance to Date	Obligations Balance to Date
	Expenses Balance	Apr	May	Year-To-Date Total	Ending Balance		
Assets	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Liabilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2010 AP (Accrual Liabilities)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Carry Forward	0.00						
Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4000 Accounting Funding	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Expenses	0.00	0.00	4,316.23	0.00	0.00	0.00	0.00
6000 Supplies and Supplies	0.00	0.00	4,316.23	0.00	0.00	0.00	0.00
Total Revenues - Expenses	0.00	0.00	(4,316.23)	0.00	0.00	0.00	0.00
Prepaid Expenses							0.00
Balance Available							0.00

### Step 4: Select either PDF or Excel to save a copy that can be downloaded.

12 Rows

Journal	Journal Source	Accounting Date	Budget Date	Ledger Account	Fund	Cost Center	Cost, CPT, Project or Program	Transferred Debit Amount	Transferred Credit Amount	Operational Transaction	Purchase Order	Supplier Customer or Employee Name	Credit Card Merchant Name	Invoice Memo	Line Memo	External Reference ID	Supplier Invoice Number
JE 000133241 - UBC The University of British Columbia 2022 04 14 4000 reimbursement for 1 language A1 Policy Location Department to team health challenge for 2021-2022	1 Campus Manual	2022-04-14	2022-04-14	6000 Supplies and Supplies	F-2000 General Purpose Operating	0000103 Total Compensation   VP Human Resources	PV002184 Healthy Workplace Initiative Fund   VP Human Resources	221.55	0.00					HWIP reimbursement for Department's team health challenge for 2021-2022	HWIP for 2021-2022 for		
JE 000133244 - UBC The University of British Columbia 2022 04 14 4000 reimbursement for 1 language A1 Policy Location Department to team health challenge for 2021-2022	1 Campus Manual	2022-04-14	2022-04-14	6000 Supplies and Supplies	F-2000 General Purpose Operating	0000103 Total Compensation   VP Human Resources	PV002184 Healthy Workplace Initiative Fund   VP Human Resources	289.08	0.00					HWIP reimbursement for Department's team health challenge for 2021-2022	HWIP for 2021-2022 for		
JE 000133244 - UBC The University of British Columbia 2022 04 14 4000 reimbursement for 1 language A1 Policy Location Department to team health challenge for 2021-2022	1 Campus Manual	2022-04-14	2022-04-14	6000 Supplies and Supplies	F-2000 General Purpose Operating	0000103 Total Compensation   VP Human Resources	PV002184 Healthy Workplace Initiative Fund   VP Human Resources	439.64	0.00					HWIP reimbursement for Department's team health challenge for 2021-2022	HWIP for 2021-2022 for		

To facilitate reimbursement, please match the ledger transactions to the receipts/invoices.