



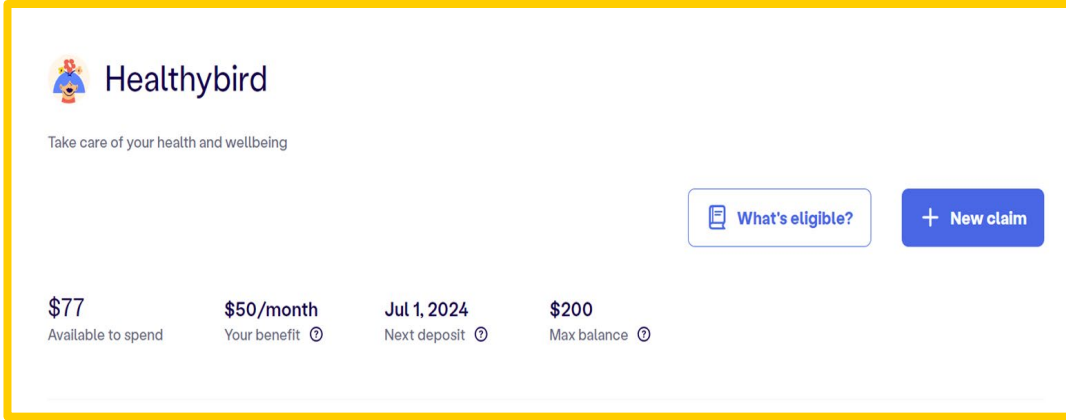
Introduction to Forma Benefits

allbirds

- 01 **Forma Benefit Plan**
- 02 Accessing Forma Benefits
- 03 Using Forma Benefits
- 04 Help with Forma Benefits


HealthyBirds

- **What is it?** A lifestyle account allowing employees to use their monthly benefit towards wellness expenses to support and encourage a well-rounded lifestyle for our employees.
- **Who is eligible?** All **full-time employees** are eligible to participate in HealthyBirds and must be employed by Allbirds when eligible expenses are incurred (paid for)
- **What is the amount? \$50 USD or local equivalent** per month and can accrue up to \$200 USD or local equivalent. You will have until February 28th of the next year to submit any remaining claims for the prior calendar year.
- **What does it cover?**
 - Fitness Activities
 - Fitness Equipment
 - Digital Health Trackers
 - Massage Therapy
 - Aromatherapy
 - More options under “What’s Eligible” on your HealthyBird wallet.




TalkingBirds

- **What is it?** A lifestyle account allowing employees to use their monthly benefit towards connectivity purposes, cell phone plans or cell phone purchase
- **Who is eligible?** All **full-time exempt employees** are eligible to participate in TalkingBirds and must be employed by Allbirds when eligible expenses are incurred (paid for)
- **What is the amount?** **\$50 USD or local equivalent** per month and can accrue up to \$200 USD or local equivalent. You will have until February 28th of the next year to submit any remaining claims for the prior calendar year.
- **What does it cover?**
 - Connectivity Utility Bills (cell-phone and internet)
 - Cables and Cords

 **Talkingbird**

For keeping touch with people that matter the most

 [What's eligible?](#)

[+ New claim](#)

\$50	\$50/month	Jul 1, 2024	\$200
Available to spend	Your benefit ⓘ	Next deposit ⓘ	Max balance ⓘ

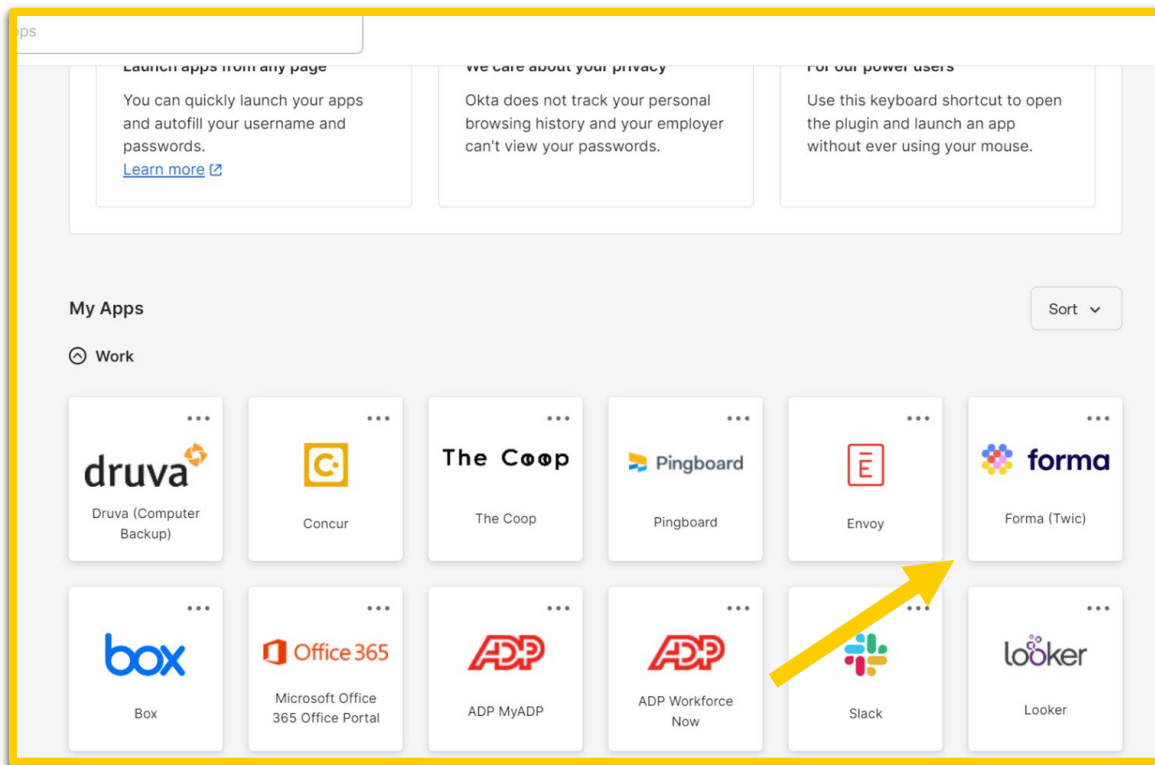
BabyBirds

- **What is it?** A lifestyle account allowing employees to use their one-time stipend to assist in reintegrating back to work after the arrival of their newest family addition
- **Who is eligible?** All employees who have recently returned from parental leave
- **What is the amount?** **\$1,000 USD or local equivalent** one-time stipend.
- **What does it cover?**
 - Baby Gear & Accessories
 - Childcare Services
 - Parental Coaching
 - Food Delivery Services
 - Parking/Commuting Fees



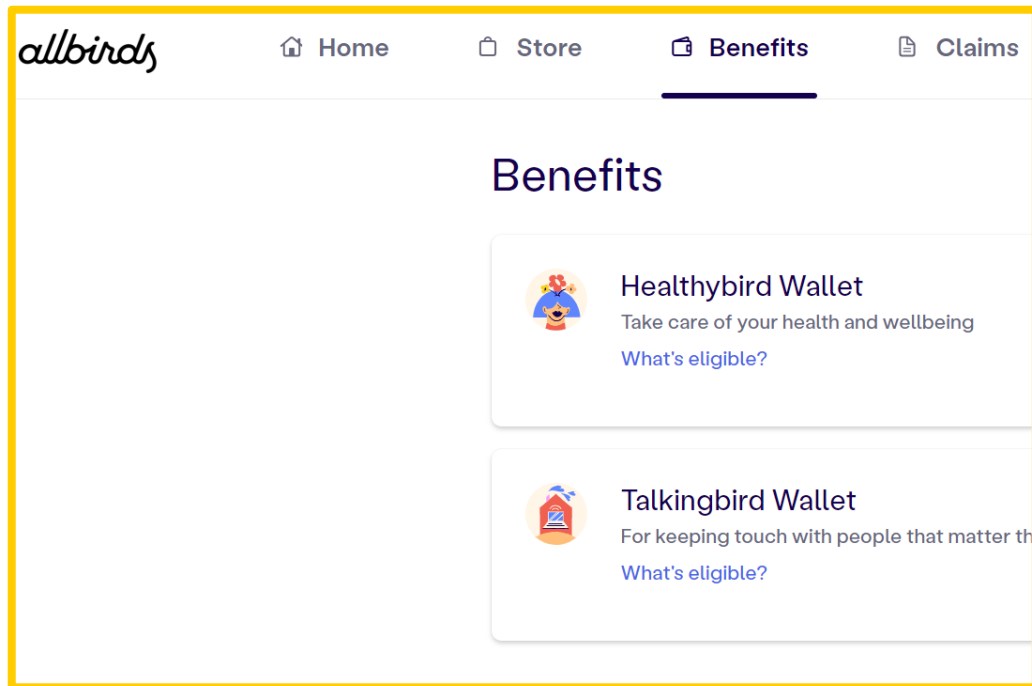
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- Log In to Okta Portal
- Click on the Forma Icon



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- Click on Benefits tab in the top navigation bar to view both active and past accounts.



- Click on an individual benefit to view:
 - Available Balance
 - When the balance renews or expires
 - Transaction History

The screenshot displays the Healthybird app interface. At the top, the logo 'Healthybird' is accompanied by the tagline 'Take care of your health and wellbeing'. Below this, there are two buttons: 'What's eligible?' and 'New claim'. The main section shows four key metrics: 'Available to spend' (\$77), 'Your benefit' (\$50/month), 'Next deposit' (Jul 1, 2024), and 'Max balance' (\$200). Each metric has a small question mark icon next to it. At the bottom, there is a 'Transaction history' section with two filters: 'Date range' set to 'Past 90 days' and 'Transaction type' set to 'All transactions'.

Healthybird

Take care of your health and wellbeing

[What's eligible?](#) [+ New claim](#)

\$77
Available to spend

\$50/month
Your benefit ⓘ

Jul 1, 2024
Next deposit ⓘ

\$200
Max balance ⓘ

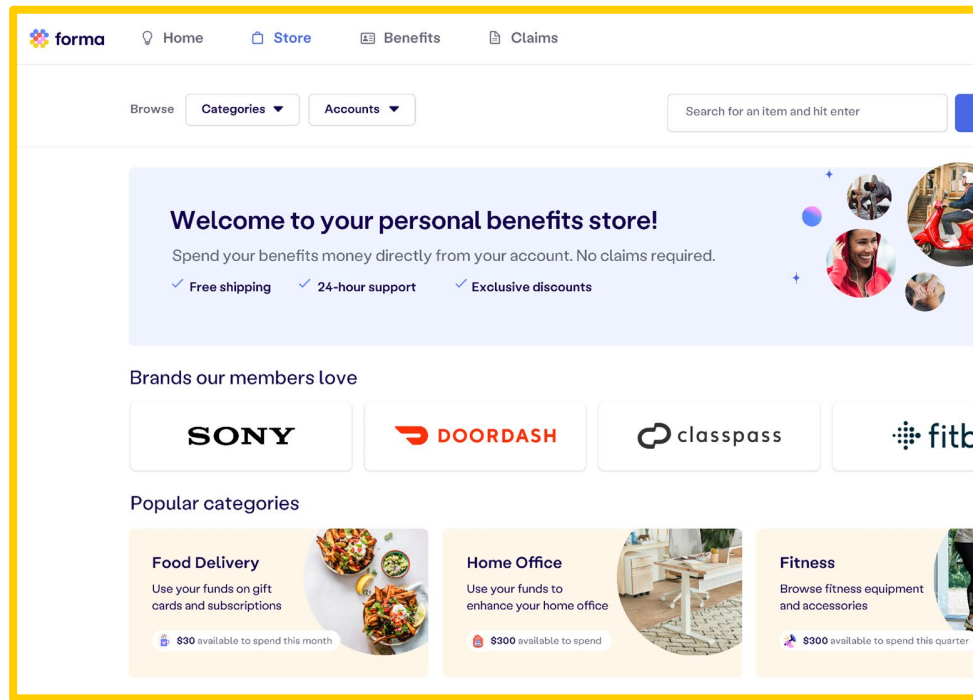
Transaction history

Date range
Past 90 days ▼

Transaction type
All transactions ▼

Forma Store Purchases

- Click on the Store tab to access discounts on eligible products:
 - 30% off retail
 - Free shipping
 - No reimbursement required



Reimbursement Claims

- To start a claim, click on Claims -> New Claim in the navigation bar
 - Fill in the form completely, attach your receipt(s) and submit
 - Claims are reviewed in 2-3 days
 - If approved, get reimbursed via payroll

File a claim

Select your account

Healthybird Wallet \$77.00



Amount

\$

Merchant or provider

Search or choose a category



Purchase date on the receipt



Description

Upload receipt(s)

Reimbursement Timeline

Submission Time	U.S. Expected Payout	International Expected Payout
January 1 - 31	2nd paycheck in February	The following month's paycheck
February 1 - 28	2nd paycheck in March	The following month's paycheck
March 1 - 31	2nd paycheck in April	The following month's paycheck
April 1-30	2nd paycheck in May	The following month's paycheck
May 1-31	2nd paycheck in June	The following month's paycheck
June 1-30	2nd paycheck in July	The following month's paycheck
July 1-31	2nd paycheck in August	The following month's paycheck
August 1-31	2nd paycheck in September	The following month's paycheck
September 1-30	2nd paycheck in October	The following month's paycheck
October 1-31	2nd paycheck in November	The following month's paycheck
November 1-30	2nd paycheck in December	The following month's paycheck
December 1-31	2nd paycheck in January	The following month's paycheck

Reimbursement Plans

- If you file a claim for an eligible expense that exceeds your available balance, it creates a “reimbursement plan” to pay you back in installments until you get the full amount.
 - Follow the same submission process as a single reimbursement claim
 - Enter the total amount (larger than your balance), you’ll see this message to confirm you’re creating a reimbursement plan

File a claim

Select your account

Healthybird Wallet \$77.00

Amount

\$ 150

Reimbursement plan

If you file a claim for an amount greater than your account balance, we will reimburse you every following period until the entire purchase is fully reimbursed (or the end of the calendar year, depending on your company's program policy.)

Merchant or provider

Search or choose a category

Purchase date on the receipt



Description

Upload receipt(s)

Reimbursement Plans

- Forma will deduct from your available balance the same day each month
 - Example: Jan 14, Feb 14, March 14...
 - If you spend some of your funds, the system will pull the remaining balance you have left
 - Cannot allocate a certain dollar amount towards a reimbursement plan item
- “Reimbursed so far” does not necessarily mean that money is in your bank account yet. See your program policy for more details on reimbursement timelines
- Claim statuses: Pending > In Progress > Completed

Claim for €250.00 at Crossfit

In Progress • The next deduction from your Sweaty Pursuits account will be on Aug 07, 2023

€100.00 reimbursed so far

€150.00 remaining ⓘ

Reimbursement Plan (Monthly)

📄 [See program policy for reimbursement info](#)

€100.00

Approved on 7/7/2023

Reimbursement via payroll

Additional claim information

📄	Description 6-month Crossfit membership
📄	Claim ID 9124ebef-301f-4fef-8fdb-3b7b320a45bd
💰	Amount approved €250.00
✅	Date of claim submission Jul 07, 2023

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Forma Support

Contact **Form Support** via live chat or email at
support@joinforma.com

Help Center
Find answers to your [FAQs!](#)