

Application for 2017 Medical Cost Relief Program

1. Eligibility

Qualified applicants will receive two payments through the program that will be on the first paychecks in October 2017 and April 2018.

- You must have an active appointment and be enrolled in a UPlan Medical Plan at the time of each payment.
- You must receive paychecks with medical premium deductions that include the above dates to receive the payments.
- You must have had a 2016 **household** income at or below the dollar amounts listed in the **Medical Cost Relief Program Chart** (on back).
- Both payments will be based on your UPlan coverage tier as of September 1, 2017, and your 2016 household income as shown in the 2016 tax filing.
- **The application deadline is September 11, 2017.**

2. Employee Information *(please print)*

Last Name _____ First Name _____ MI _____ Employee ID Number _____

Employee Benefits will contact you only if there is a problem with your application. To reach you, please provide:

Phone Number _____

Email Address or Mailing Address _____

3. 2017 Medical Plan Coverage Level

- Employee-only
- Employee & Children
- Employee & Spouse with or without Children

4. Tax Form Required

1. Write in your 2016 Federal Income from the tax form(s) that you used:* \$ _____

* For purposes of this program, your federal income is determined from either:

- Line 22 of federal tax form 1040
- Line 15 of federal tax form 1040A
- Line 4 of federal tax form 1040EZ

2. Write in the amount of Medical Cost Relief for which you qualify: *Look at the **Medical Cost Relief Program Chart** on the back of this application:* \$ _____

3. Along with this application, please include a **copy** of your **2016 Federal Tax** form 1040, 1040A, or 1040EZ. You do not need to submit any of the separate federal schedules or your state tax form(s). If you have Employee and Spouse with or without Children coverage, also include a **copy** of your spouse's 2016 Federal Tax form if you cover your spouse and your filing status is Married Filing Separately.

If your 2017 Medical Cost Relief Program application is approved, you will receive two payments that will be on the first paychecks in October 2017 and April 2018. The two payments will be added to your 2017 and 2018 W-2s.

The application deadline is September 11, 2017.

Please Note: After your tax form is received and the information is verified, it will be confidentially destroyed. Your tax form will not be kept on file at the University. *Even though all tax forms will be destroyed and applications kept confidential, your department's accounting staff will have access to the payout details since they see your compensation information.*

5. Employee Authorization *(Please read before signing)*

I am applying for the UPlan's Medical Cost Relief program. I certify that all personal and financial information provided is accurate. I understand that the University holds the right to request and again receive access to my 2016 tax form if necessary for future audit purposes. I further understand that providing false information on this application may result in disciplinary action up to and including termination of employment. I agree that the University may recover damages for losses and reasonable attorney's fees incurred by the University to recover such damages.

Employee Signature _____ Date _____

If you have questions, contact the Employee Benefits Service Center at 612-624-8647 or 1-800-756-2363 or by email at benefits@umn.edu.
Please make a copy of this application for your records and send both the application and tax form(s) to Employee Benefits:

U.S. Mail: Employee Benefits
 200 Donhowe Bldg., 319 15th Avenue SE
 Minneapolis, MN 55455-0103

Fax: 612-626-0808

2017 Medical Cost Relief Program Chart

Coverage tier as of 9/1/2017	2016 Gross Household Income					
	Employee Only	N/A	N/A	N/A	N/A	N/A
Employee and Children	Up to \$36,430	From \$36,431 up to \$39,240	From \$39,241 up to \$42,030	From \$42,031 up to \$44,830	From \$44,831 up to \$47,640	From \$47,641 up to \$50,440
Employee and Spouse with or without Children	Up to \$54,370	From \$54,371 up to \$57,160	From \$57,161 up to \$59,920	From \$59,921 up to \$62,770	From \$62,771 up to \$65,570	From \$65,571 up to \$68,380
2017/2018 Payment Amounts						
	Qualifies for:	Qualifies for:	Qualifies for:	Qualifies for:	Qualifies for:	Qualifies for:
Annual	\$ 450	\$ 400	\$ 350	\$ 300	\$ 250	\$ 200
Per Payment	\$ 225	\$ 200	\$ 175	\$ 150	\$ 125	\$ 100

Information and Privacy — There are laws to protect your rights.

Several state and federal laws aid in protecting your rights to privacy and make it easier for you to review information in your insurance file. Under one of these laws – the Minnesota Government Data Practices Act (Minnesota Statutes 13.01-13.43) – you have the right to know the following.

A. Why the Information is Needed

The information we request about you, your employment, and family members is needed for one or more of the following reasons:

- To determine whether you are eligible for University of Minnesota UPlan Health Program coverage
- To determine eligibility under the 2017 Medical Cost Relief Program

B. Supplying Information – Your Rights

- **Minnesota Statute 13.04.** You may refuse to provide the information we request; however, without certain minimal information, we may be unable to process your application.
- **Federal Privacy Act of 1974; Public Law 93-579.** Disclosure of your Social Security number is voluntary. The information is requested to identify your records in the Employee Benefits system and the records of the Plan Administrators. While you are not legally required to furnish this information, processing of your application will be delayed without it.

C. Who Uses the Information and How It is Used

The information we collect will be used by the University's Employee Benefits department to determine eligibility for the 2017 Medical Cost Relief Program. The information will not be used for any other purposes.

D. What Information You can Access

You may request in writing to be shown information about yourself that is maintained by our department. There is no charge for this service, but there is a small copy charge should you need copies.