

# The University of Alabama Premium Assistance Guidelines



Division of  
Finance and Operations  
Human Resources

[hr.ua.edu/benefits/health-care-benefits/premium-assistance](https://hr.ua.edu/benefits/health-care-benefits/premium-assistance)

## Program Description:

UA provides premium assistance to benefit-eligible active employees by giving a medical premium discount based on (1) family size and (2) total combined household income set at 1.5x the [Federal Poverty Level](https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines) (FPL) for the prior calendar year: <https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>. For example, the eligibility determination for an employee applying for premium assistance in January 2023 would be compared against the 2022 FPL. A [discount table](#) is available to review on the HR website.

## Application Instructions:

To apply for this discount, benefit-eligible employees must submit the following Premium Assistance Application and furnish acceptable proof of total annual household income based on their most recently filed Federal Income Tax Return transcript, W-2s and 1099s. The Benefits Office will make the final determination.

## Application Deadlines:

- [Current Employees](#) – Submit documentation annually during Open Enrollment (Oct. 15 – 31 each year)
- [Newly Eligible Employees](#) – 30 days from date of hire / start date

The amount of the discount provided is equal to the lowest cost single plan employee premium offered. Refer to the [Current Rates webpage](#) and the HDHP medical rates for employee only coverage: <https://hr.ua.edu/benefits/health-care-benefits/current-rates>. The discount is available for employees covered by either medical plan, the PPO or HDHP. Employee's regular healthcare premiums will remain tax-sheltered.

After receipt and approval of the application, the premium discount will be effective based on the medical plan effective date and will be reflected in the first available paycheck. The discount only applies to medical plan enrollment and is for the current plan year only. Employees must reapply each year during Open Enrollment.

Estimate your eligibility for the discount using the table on the [Premium Assistance webpage](#): <https://hr.ua.edu/benefits/health-care-benefits/premium-assistance>. If eligible, complete the application on back and send it to our office with all required information from your Federal Income Tax Return for the current year.

***See Reverse Side for Premium Assistance Application, Application Instructions and Required Documentation Requirements.***

Contact the HR Service Center with questions at (205) 348-7732 or email [hr@ua.edu](mailto:hr@ua.edu).

**PREMIUM ASSISTANCE APPLICATION  
BENEFIT-ELIGIBLE EMPLOYEES**  
1670 Ruby Tyler Parkway ♦ 1001 HR Administration  
Tuscaloosa, Alabama 35487-0174  
(205) 348-7732



**Please complete Steps 1-5 below to apply for the UA Premium Assistance Program.**

**STEP 1: Complete the Employee information below.**

*Name must be entered as shown on your Social Security card.*

CWID	First Name	Middle Initial	Last Name	
Mailing Address		City	State	Zip Code
Home Phone	Cell Phone	myBama Email Address		
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Legally Separated				

**STEP 2: Include ALL of the following within 30 days of hire (or annual Open Enrollment)**

- Premium Assistance Application** (this form) must be completed, signed and dated. If married, member and spouse must sign all documents.
- Tax Return Transcript** of your most recently filed federal income tax return, showing you and/or your spouse's name or last four digits of Social Security numbers and tax filing period. The tax return transcript is the only official record of the tax return that you filed with the IRS. A copy of your tax return (Form 1040, 1040A, 1040EZ, or Form 8879 e-file documentation) is not sufficient documentation because it can be falsified and is not an official record of what was filed with the IRS. **To receive your tax return transcript, visit <https://www.irs.gov/individuals/get-transcript> or call 800.908.9946.**
- All W-2s AND all 1099s** from sources of income that were included in the Total Household Income of your and your spouse's (if married) Federal Income Tax Return(s).

**STEP 3: Sign and date this application**

I declare that the above information, the accompanying tax return transcripts, supporting 1099s, and W-2s are true, complete and accurate. I also understand that if any statements or accompanying tax returns and supporting 1099s and W-2s are found to be incorrect, incomplete, false or misleading, I will be required to repay all premium assistance discount amounts.

Employee Signature \_\_\_\_\_ Date Signed \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse Signature \_\_\_\_\_ Date Signed \_\_\_\_/\_\_\_\_/\_\_\_\_

**STEP 4: Email this completed application to the HR Service Center at [hr@ua.edu](mailto:hr@ua.edu), fax to (205) 348-8755, or deliver to 1022 Employee Resource Center building located at 1515 Flint River Drive.**

**STEP 5: Upload all required tax documents from STEP 2 to the Document Center within the Benefitfocus portal (tag with keyword Premium Assistance) available via single sign-on in myBama or deliver in-person to the HR Service Center.**

**Reminders**

1. Only one application will be reviewed per year unless there is a qualifying life event, like marriage or birth.
2. **You must reapply every year during Open Enrollment. Your discount does not automatically renew.**

Any information provided to UA is kept strictly confidential.  
Your income and tax information will not be shared with any third party.