

**IOWA ANNUAL CONFERENCE OF THE UNITED METHODIST CHURCH
MEDICAL EXPENSE ASSISTANCE FUND
ADMINISTERED BY THE BOARD OF PENSION & HEALTH BENEFITS**

PURPOSE: The purpose of this fund is to provide assistance to clergy members of the annual conference and/or their dependents in the payment of medical expenses that are beyond their capacity to meet after exhausting all other resources.

POLICY

IT IS THE POLICY OF THE Annual conference to assist clergy members who are currently experiencing financial hardship caused by medical expenses incurred by the clergy member or a direct dependent after all other available resources have been exhausted.

1. For purposes of this policy, persons eligible for assistance are clergy members who participate in the conference Health Plan, her or his spouse, and other members of the clergy members family who are being claimed as dependents for income tax purposes. It shall also include surviving spouses of eligible clergy members who are participants in the Conference Health plan.
2. Medical expenses shall include, insurance premiums, non-covered direct medical expenses, or other expenses deductible as medical expenses for federal income tax purposes.
3. In the event that a long-term condition meets conditions set out in paragraph 2 above, a request for assistance shall be reduced by 50% in the second year, 75 for a third year, and shall not be approved for years four and five. Thereafter, this formula will reset.

Requests for assistance must be submitted by the applicant, but the District Superintendents should assist in the application process and make clergy members in distress of the availability of this fund.

The Awards Committee of the Board of Pensions and Health Benefits will be responsible for the review of each request. That committee may make an award of up to \$2500.00 or may modify the request made or deny same. If the Committee should determine that an award in excess of \$2500.00 is appropriate, the request will be forwarded to the full Board of Pensions for action.

PROCESS/PROCEDURE

1. Applications for assistance shall be submitted on forms provided by the Board of Pensions and shall include all information requested in said application. Incomplete applications will be returned to the applicant for revision if necessary.
2. The Conference Benefits Officer (CBO) shall be an advisor to applicants and to the Committee.

3. The Awards Committee of the Board of Pensions shall review all requests within 30 days of receipt of a complete application. Such review may be conducted electronically as well as in person.
4. The committee may approve the grant as submitted, modify the amount requested or may deny the request.
5. The CBO shall act as a resource to the Applicant in exploring all options and sources of funds available to the applicant before the award is made or denied.
6. If an application for relief is denied, the applicant may appeal the decision to the full Board of Pensions and Health Benefits. If the Board is not scheduled to meet for more than 30 days, the Executive Committee of the CBOP may take action on the appeal.
7. If an award is made, the funds will be deposited directly into the applicant's bank account. It is the clergy member's responsibility to make payment to the appropriate provider or in payment of expenses incurred.
8. At the time the award is made, the Applicant shall be informed that the award may be considered taxable income for the year in which received.

Questions regarding this policy should be directed to the Conference Benefits Officer.