



AUTOMOBILE MECHANICS' LOCAL 701 WELFARE FUND

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IMPORTANT BENEFIT PLAN CHANGES

The Trustees of the Automobile Mechanics' Local No. 701 Union and Industry Welfare Fund have made certain changes to the **Premier Plus**, **Premier**, and **Pre-Medicare Retirees** Plans (collectively, the "Plans") as documented in the applicable combination Summary Plan Description and Plan Document ("SPD/Plan") that was previously provided to you. Each change is summarized below and is effective as of the date indicated below.

1. Effective as of March 1, 2025, the Plan engaged Conifer Value-Based Care, LLC as the case management and utilization review company instead of MCM/Valenz Care,.
2. Effective January 1, 2025, the **Premier Plus**, **Premier**, and **Pre-Medicare Retirees** Plans were amended to add a new wellness program under which you and your covered spouse will each be eligible to receive a reimbursement up to \$125 towards your annual deductibles for completing a biometric screening at the Fund's annual health fair.

SUMMARY OF MATERIAL MODIFICATIONS

This document, referred to as a “summary of material modifications,” is intended to supplement the SPD/Plan. You should retain this summary of material modifications with your copy of the SPD/Plan. If you have any questions, you may contact the Fund Office at 1-708-482-0110.

1. Change to the Plan’s Case Management and Utilization Review Company

The Plan will be switching to Conifer Value-Based Care, LLC as the case management and utilization review company instead of MCM/Valenz Care, effective as of March 1, 2025. Therefore, all references in the SPD/Plan to “MCM/Valenz Care” are replaced with “Conifer Value-Based Care, LLC.” The new contact information for Conifer Value-Based Care, LLC is 1-844-213-5660.

2. Addition of Deductible Credit for Completing a Biometric Screening

The Plan was amended to allow you and/or your covered spouse to each receive a reimbursement up to \$125 towards your annual deductibles for completing a biometric screening at the Fund’s annual health fair. Accordingly, effective January 1, 2025, a new paragraph is added to the end of the Calendar Year Deductible subsection under the Medical Benefit section of the SPD/Plans to read as follows:

You and/or your covered spouse will each be eligible to receive a reimbursement up to \$125 towards the applicable calendar year deductible following the completion of a biometric screening at the Fund’s annual health fair, which will generally be held prior to October 31 in each Plan Year. You will be eligible to receive a reimbursement up to \$125 if you complete such a screening, and your covered spouse will be eligible to receive a reimbursement up to \$125 if your spouse completes such a screening. The reimbursement will be issued based on the annual deductible for the same Plan Year in which the screening occurs. Please see the Wellness Program section of this Plan/SPD for more information about the wellness programs offered by the Fund.

In addition, effective January 1, 2025, a new section entitled “Wellness Programs” is added after the Health Reimbursement Account (“HRA”) section of the SPD/Plans to read as follows:

From time to time the Fund may offer wellness programs designed to promote the health and well-being of you and your covered spouse. These wellness programs may provide financial incentives to engage in activities that encourage healthy lifestyle changes, provide you with information about your current health condition by undergoing health screenings or answering questionnaires, give you the opportunity to receive health “coaching” and participate in disease management programs, provide on-line education tools, etc. These wellness programs are designed to help mitigate risks and allow you and your covered spouse to be more involved in your healthcare, which may lead to a healthier employee population with lower healthcare costs, ultimately saving you and the Fund money. Any information collected as part of a wellness program will be de-identified and may be analyzed and considered when developing future wellness programs and making future plan design changes affecting all participants. The terms of any wellness programs will be communicated to you separately as part of the Fund’s annual notice distribution or other communication. Participation in the wellness program is available to all members and their covered spouses and is completely voluntary. Any wellness program and related financial incentive offered under the Plan/SPD shall comply with the requirements and limitations of HIPAA, PPACA, EEOC and related guidance.

You and/or your covered spouse will each be eligible to receive a reimbursement up to \$125 towards the applicable calendar year deductible following the completion of a biometric screening at the Fund’s annual health fair, which will generally be held prior to October 31 in each Plan Year. You will be eligible to receive a reimbursement up to \$125 if you complete such a screening, and your covered spouse will be eligible to receive a reimbursement up to \$125 if your spouse completes such a screening. The reimbursement will be issued based on the annual deductible for the same Plan Year in which the screening occurs.