

Financial Assistance Application

1. Patient Information

Patient's Name: _____
First M.I. Last

Patient's Address: _____
Street City State / Zip Code

Patient's Phone Number: _____

Patient's Date of Birth: _____ Patient's Marital Status: _____
Single or Married

Patient's Social Security Number: _____

Patient's Account Number: _____

2. Guarantor Information

Guarantor's Name: _____
First M.I. Last

Guarantor's Address: _____
Street City State / Zip Code

Guarantor's Phone Number: _____

Guarantor's Date of Birth: _____ Guarantor's Marital Status: _____
Single or Married

Guarantor's Social Security Number: _____

Guarantor's Relationship to Patient: _____

	Patient/Guarantor	Spouse
through your employer or school? (Y/N)		
Do you have Medicare? (Y/N)		
Do you have Medicaid? (Y/N)		
Do you receive Veteran's Benefits? (Y/N)		

Total Household Income

Please note your household's total monthly income from all sources:

- | | | | |
|--|----------|--|----------|
| <input type="checkbox"/> Wages | \$ _____ | <input type="checkbox"/> Tips | \$ _____ |
| <input type="checkbox"/> Self-Employment | \$ _____ | <input type="checkbox"/> Business Profits | \$ _____ |
| <input type="checkbox"/> Interest Income | \$ _____ | <input type="checkbox"/> Dividends | \$ _____ |
| <input type="checkbox"/> SSI/Social Security | \$ _____ | <input type="checkbox"/> Rental Income | \$ _____ |
| <input type="checkbox"/> Child Support | \$ _____ | <input type="checkbox"/> Alimony | \$ _____ |
| <input type="checkbox"/> Veteran's Benefits | \$ _____ | <input type="checkbox"/> Worker's Comp. | \$ _____ |
| <input type="checkbox"/> Unemployment | \$ _____ | <input type="checkbox"/> Food Stamps | \$ _____ |
| <input type="checkbox"/> Pension/Retirement | \$ _____ | <input type="checkbox"/> Farm Income | \$ _____ |
| <input type="checkbox"/> Insurance/Annuities | \$ _____ | <input type="checkbox"/> Public Assistance | \$ _____ |
| <input type="checkbox"/> Trust Income | \$ _____ | <input type="checkbox"/> Other | \$ _____ |

5. Required Documentation

Attach copies of the documents listed below for both the patient/guarantor and spouse (please submit only copies; no original documents):

- Most recent tax return, including W-2 forms and supporting schedules
- Last 2 pay stubs or a letter from an employer verifying income (include employer's phone number and address)
- Bank statements for the past 2 months
- Written verification of any other income received (e.g. child support, social security, alimony)

OR

- **If you have no income, a letter or a comment below from you stating your source for paying living expenses**

6. Other Comments

7. Acknowledgement

I hereby acknowledge that the information in this application (including any attachments) is true, complete and accurate to the best of my knowledge. Furthermore, I understand that to qualify for Financial Assistance, I must take all steps necessary to apply for and obtain any other available payment sources (such as Medicaid, Medicare, insurance, etc.).

I hereby authorize UP Health System Portage to contact any person, firm or organization to verify any of the information given, and I hereby authorize any such person, firm or organization to release such information to UP Health System Portage. I also authorize UP Health System Portage to request a consumer credit report.

Patient/Guarantor's Signature: _____ Date _____

Spouse's Signature: _____ Date _____

8. Mailing Instructions / Contact Information

Mail (or hand deliver) your complete Financial Assistance Application with documentation to:

UP Health System Portage
Attn: Financial Counselors
500 Campus Drive
Hancock, MI. 49930

For additional information about UP Health System's Financial Assistance Policy, or for assistance with this application, please call Patient Financial Services at 906-483-1100 option 2 or visit a Financial Counselor at the above address.

Please allow 30 days for processing.

For Internal Use Only

Processed By: _____ Date: _____
Financial Counselor

Eligibility Determination: () Yes () No Discount: _____%

If denied, state reason: _____

Reviewed/Approved By: _____ Date: _____
Patient Access Manager/Director (or designee)

Patient Financial Services Director (or designee) Date: _____

Hospital Controller/CFO (or designee) Date: _____

Instructions for Completing UP Health System Portage's Financial Assistance Application

1. Patient Information

Patient's Name: Clearly print on the blank line the first name, middle initial, and last name of the patient.

Patient's Address: Clearly print on the blank line the address where the patient lives including the city, state and zip.

Patient's Phone Number: Clearly print on the blank line the patient's phone number.

Patient's Date of Birth: Clearly print on the blank line the patient's date of birth.

Patient's Marital Status: Clearly print "single" or "married".

Patient's Social Security Number: Clearly print on the blank line the patient's social security number.

Patient's Account Number: Clearly print the medical record number that UP Health System Portage has issued the patient (or the Guarantor's ID # if the application is for a dependent's balances).

2. Guarantor Information (Complete if applicable)

Guarantor's Name: Clearly print on the blank line the first name, middle initial, and last name of the patient's parent, legal guardian or other responsible person ("guarantor").

Guarantor's Address: Clearly print on the blank line the address where the guarantor lives including the city, state and zip.

Guarantor's Phone Number: Clearly print on the blank line the guarantor's phone number.

Guarantor's Date of Birth: Clearly print on the blank line the guarantor's date of birth.

Guarantor's Marital Status: Clearly print "single" or "married".

Guarantor's Social Security Number: Clearly print on the blank line the guarantor's social security number.

Guarantor's Relationship to Patient: Describe what the guarantor's relationship is to the patient (for example, parent or legal guardian).

3. Spouse Information (Complete if applicable; may be skipped if patient/guarantor is single)

Spouse's Name: Clearly print on the blank line the first name, middle initial, and last name of the patient/guarantor's spouse.

Spouse's Address: Either clearly print on the blank line the address where your spouse resides (or indicate "Same" if you and your spouse reside at the same address).

Spouse's Phone Number: Clearly print on the blank line your spouse's phone number.

Spouse's Date of Birth: Clearly print on the blank line your spouse's date of birth.

Spouse's Social Security Number: Clearly print on the blank line your spouse's social security number.

4. Household Information

Dependents: Clearly print the name, relationship and date of birth for each person in your household whom you can claim as a dependent on your taxes (children or adults for whom you financially provide more than 50% of their living expenses). You may attach additional sheets of paper if more space is needed.

Employment and Insurance Information: For both patient/guarantor and your spouse, answer each of the questions indicated. Write "Yes" or "No" or provide the requested information in each applicable box.

Total Household Income: Clearly print the total income your household (yourself, your spouse, and dependents) receives each month from all sources. You may attach additional sheets of paper if more space is needed.

- If your household receives income from a source that you do not see listed, please indicate that amount on the line for "Other."
- If your household receives income from a source that is not paid to you every month, take the total amount you have received from that source during the past 12 months, divide it by 12, and then indicate that amount on the application.

5. Required Documentation

The documents listed in this section are needed to help us determine if you qualify for financial assistance under UP Health System Portage's Financial Assistance Policy. If you do not have, or cannot produce the items listed, please include an explanation as to why. Please note that additional information or documentation may be requested by the Patient Financial Services staff when processing your application.

6. Comments

Use this section to share any additional information you would like us to consider in the evaluation of your Financial Assistance Application.

7. Acknowledgement

Patient/Guarantor's Signature: Carefully read the acknowledgement statement in this section and then sign and date the application.

Spouse's Signature: Have your spouse (if married) carefully read the acknowledgement statement in this section and then sign and date the application.