How to apply for financial assistance
Instructions for filling out your application

By law, all hospitals have to provide financial assistance to people and families who meet certain requirements. You may be able to get free care or pay less for certain services based on your family size, income and assets, even if you have health insurance. To view our financial assistance policy, please go to ohsu.edu/financial-assistance.

What is covered by financial assistance

- Not all services qualify so you will need to make sure that the service is covered before you get it. For a list of services we do NOT cover, see our financial assistance policy at ohsu.edu/financial-assistance.
- Please note that if you are approved for financial assistance, it does NOT guarantee that you will get services.
- If you could qualify for Medicaid or other programs, we encourage you to apply for these as they may have additional benefits.

Steps to complete the application form

1. Fill out information about you and your family
   - You do NOT need to provide your social security number.
   - List family members who are related to you by birth, marriage, or adoption and who live together.
   - A child is typically considered a dependent if they are under 18.
   - Examples of households are:
     - Legally married couples (or domestic partners) who live together, along with their dependent children under 18 years, and anybody else who lives in the household that the couple claims on their taxes
     - Unmarried couples with one or more children in common, if the child is the patient
     - Sponsored non-citizen, their sponsor, and sponsor's family

2. Fill out information about your family's gross income (income before taxes and deductions) and expenses.

3. Declare and provide proof of assets.

4. Attach all other information that we have asked for.

5. Sign and date the financial assistance form.

For help filling out the application, call 503-494-8551, Monday-Friday, 9 a.m-4:30 p.m.
Documents to include with the form

Please send the most current copies of all documents below that apply to you. We will NOT be able to return original documents.

- **Proof of residency.** Provide one of the following: utility bill in your name, rental agreement, mortgage statement for your residence, copy of your driver’s license or identification card. We may ask for additional proof of residency. You must be a resident of the state of Oregon or bordering county in the state of Washington (Benton, Clark, Columbia, Cowlitz, Klickitat, Lewis, Pacific, Skamania, Wahkiakum, Walla Walla, and Yakima) with no plans to move out of the area.

- **Paycheck stubs** for the last three full calendar months. If you do not have your paystubs, you may instead give us a letter from your employer that lists your gross income for the last three full calendar months. Income is counted in the month it was received (pay date) and not the month it was earned.

- **Income tax returns** for the most recent year filed, including any schedules (such as schedule C for self-employment income).

- **Social Security, Veterans, Pension Award Letter** or the equivalent

- **Claims determination** from the State Employment Division

- **Child support** and/or **spousal support** statement

- **Self-Employment Income Worksheet** or **Profit and Loss** statement for the last three full calendar months

- Verification documents for any other income source listed on your application, including income from interest or dividends, or any other recurring source of income

- **Bank/credit union statements**; checking and savings accounts

- **Cash deposit (CD), stocks, bonds, or investment account statements**

- Financial statement that confirms your **business equity**

- Documentation confirming any miscellaneous **assets listed**

Turn in the form

- We will let you know if you qualify for financial assistance within **3 weeks** after we get your completed application and documents

- You will still get bills while we are reviewing your application.

**Mail or fax:**
Oregon Health & Science University
Patient Financial Services, RPB07
3181 SW Sam Jackson Park Road
Portland, OR 97239-3098
**Fax:** (503) 418-2377

**To deliver in person:**
Sam Jackson Hall, Room 1306
OHSU Marquam Hill Campus
Physical address: 3245 SW Pavilion Loop
Portland, OR 97239
**Financial Assistance Application Form**

*Please fill out all information completely. If it does not apply, write “NA.” Attach additional pages if needed.*

### SCREENING INFORMATION

- Do you need an interpreter?  □ Yes  □ No  If Yes, list preferred language:
- Has the patient applied for Medicaid?  □ Yes  □ No
- Does the patient receive state public services such as TANF, Basic Food, or WIC?  □ Yes  □ No
- Is the patient currently homeless?  □ Yes  □ No
- Is the patient’s medical care need related to a car accident or work injury?  □ Yes  □ No

### PLEASE NOTE
- We cannot guarantee that you will qualify for financial assistance, even if you apply.
- Once you send in your application, we may check all the information and may ask for additional information or proof of income.
- Within 21 calendar days after we receive your completed application and documentation, we will notify you if you qualify for assistance.

### PATIENT AND APPLICANT INFORMATION

<table>
<thead>
<tr>
<th>Patient first name</th>
<th>Patient middle name</th>
<th>Patient last name</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Male  □ Female  □ Other (may specify ____________)</td>
<td>Birth Date</td>
<td>Patient Social Security Number (optional)</td>
</tr>
<tr>
<td>Person Responsible for Paying Bill</td>
<td>Relationship to Patient</td>
<td>Birth Date</td>
</tr>
</tbody>
</table>

Mailing Address (include physical address if different)
_________________________________________________________________
_________________________________________________________________
City                                                      State                                         Zip Code

Main contact number(s)
(   ) __________________
(   ) __________________

Email Address: ______________________________

Employment status of person responsible for paying bill
□ Employed (date of hire: ______________________) □ Unemployed (how long unemployed:________________________)
□ Self-Employed  □ Student  □ Disabled  □ Retired  □ Other (____________________)

### FAMILY INFORMATION

List family members in your household, including you. “Family” includes people related by birth, marriage, or adoption who live together.

**FAMILY SIZE ___________**

<table>
<thead>
<tr>
<th>Name</th>
<th>Date of Birth</th>
<th>Relationship to Patient</th>
<th>Employer(s) name or source of income</th>
<th>Total gross monthly income (before taxes):</th>
<th>Also applying for financial assistance?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td>Yes / No</td>
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<td>Yes / No</td>
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</table>

All adult family members’ earned and unearned income must be disclosed. Please provide unearned income for anyone in the household who is under 18. Sources of income include, for example:
- Wages
- Unemployment
- Self-employment
- Worker’s compensation
- Disability
- SSI
- Child/spousal support
- Work study programs (students)
- Pension
- Retirement account distributions
- Other (*please explain*)
INCOME INFORMATION

**REMEMBER:** You must include proof of income with your application.

You must provide information on your family’s income. Income verification is required to determine financial assistance. All family members must disclose their income. Please provide proof for every identified source of income. Please see the cover sheet for a complete list of income requirements. Examples of proof of income include:

- Current pay stubs (3 months); and
- Last year’s income tax return, including schedules, if applicable; and
- Written, signed statements, from employers or others; and
- Approval/denial of eligibility for Medicaid and/or state funded medical assistance; and
- Approval/denial of eligibility for unemployment compensation

If you have no income, please attach an additional page with an explanation.

EXPENSE INFORMATION

*Optional. May be used in some situations to get a more complete picture of your financial situation.*

<table>
<thead>
<tr>
<th>Monthly Household Expenses</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Rent/mortgage</td>
<td>$</td>
</tr>
<tr>
<td>Insurance Premiums</td>
<td>$</td>
</tr>
<tr>
<td>Other Debt/Expenses</td>
<td>$</td>
</tr>
<tr>
<td>Medical expenses</td>
<td>$</td>
</tr>
<tr>
<td>Utilities</td>
<td></td>
</tr>
<tr>
<td>(child support, loans, medications, other)</td>
<td></td>
</tr>
</tbody>
</table>

ASSET INFORMATION

This information will be used if your income is above 101% of the Federal Poverty Guidelines.

<table>
<thead>
<tr>
<th>Current checking account balance</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current savings account balance</td>
<td></td>
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</tbody>
</table>

Does your family have these other assets?

**Please check all that apply**

- Stocks
- Bonds
- 401K
- Health Savings Account(s)
- Trust(s)
- Property (excluding primary residence)
- Own a business

ADDITIONAL INFORMATION

Please attach an additional page if there is other information about your current financial situation that you would like us to know, such as a financial hardship, excessive medical expenses, seasonal or temporary income, or personal loss.

PATIENT AGREEMENT

I understand that OHSU Health may verify information by reviewing credit information and obtaining information from other sources to assist in determining eligibility for financial assistance or payment plans.

I affirm that the above information is true and correct to the best of my knowledge. I understand if the financial information I give is determined to be false, the result may be denial of financial assistance, and I may be responsible for and expected to pay for services provided.

_______________________________________________   __________________________
Signature of Person Applying                                  Date