

# Appendix C

## Financial Assistance Required Documentation Checklist

In addition to completing the Inova Financial Assistance application, you will need to provide proof of your income and residency from the list of options below that will satisfy Inova's Financial Assistance Policy requirements.

**Please note that your application submission must be within 365 days from first statement date to be eligible for review and decision.**

<b><u>Individual/Family Income Requirement</u></b> If a spouse or partner lives with you, their income documentation is also required. Must include one (1) of the following from the list below:	<b><u>Residency Requirement</u></b> Proof of 30-days of Virginia residency prior to any services received at Inova is required. Must include one (1) of the following from the list below:
<b>Most recent federal income tax return:</b> <ul style="list-style-type: none"> <li>• Please submit the full tax return documentation with date and signature.</li> <li>• Between January and April this will not be accepted. The two most recent paystubs should be submitted instead.</li> </ul>	<b>Valid Virginia-issued Driver License or Identification Card, Virginia Voter Registration Card, Virginia DMV records:</b> Document must have been issued at least 30 days prior to the date of service.
<b>Two Most Recent Paystubs:</b> Paystubs must show gross income before deductions, pay period date and year to date earnings.	<b>Most recent federal income tax return:</b> Please submit the full tax return documentation with date and signature.
<b>Verification of Employment:</b> <ul style="list-style-type: none"> <li>• If tax return or paystubs are unavailable, employer may complete this form/letter.</li> <li>• Download from <a href="http://www.inova.org/patients-visitors/financial-assistance">www.inova.org/patients-visitors/financial-assistance</a></li> </ul>	<b>Utility bill or bank statement:</b> <ul style="list-style-type: none"> <li>• Document must reflect applicant's name and current address.</li> <li>• Document must have been dated/generated at least 30 days prior to the Inova date of service.</li> </ul>
	<b>Verification of Residency:</b> <ul style="list-style-type: none"> <li>• Form is to be completed by landlord/property owner.</li> <li>• Download from: <a href="http://www.inova.org/patients-visitors/financial-assistance">www.inova.org/patients-visitors/financial-assistance</a></li> </ul>
<b>Verification of Support:</b> <ul style="list-style-type: none"> <li>• Form is intended for patients who are unemployed and receiving support from family/friend/other.</li> <li>• Form is to be completed by the person (family/friend/other) helping to support with shelter, food and/or living expenses. <b><i>This document does not assign the person completing the form any financial responsibility of outstanding medical debt due from the patient who is applying for financial assistance.</i></b></li> <li>• Taxes will be requested of supporters in the same household to determine if patient is claimed as a dependent.</li> <li>• If recently unemployed, please also provide documentation from the previous place of employment.</li> <li>• Download from: <a href="http://www.inova.org/patients-visitors/financial-assistance">www.inova.org/patients-visitors/financial-assistance</a></li> </ul>	<b>School records:</b> <ul style="list-style-type: none"> <li>• Documents must reflect child name, school name and current address.</li> <li>• School must be accredited by a US state, jurisdiction or territory.</li> <li>• This may include a transcript, Emergency Care Form, letter or other documentation that can be requested from the school or downloaded from a virtual portal.</li> </ul>
<b>Verification of Self-Declaration:</b> <ul style="list-style-type: none"> <li>• Intended for patients who are day workers, migrant/seasonal workers, earn tips as their income or who are unemployed and not receiving support from family/friend/other with shelter, food and/or living expenses.</li> <li>• If recently unemployed, please also provide documentation from previous place of employment.</li> <li>• Download from: <a href="http://www.inova.org/patients-visitors/financial-assistance">www.inova.org/patients-visitors/financial-assistance</a></li> </ul>	
<b>Other Income-Related Documentation that may be requested include (but are not limited to)*:</b> Social Security benefit letter, pension, retirement income, survivor benefits, unemployment benefits, government assistance program, public assistance benefit letter, interest dividends, royalties, income from estate/trust, education/tuition assistance documentation, alimony/child support documentation, ambassador status verification on embassy letterhead, third-party income verification (home lease, purchase application, automobile lease, loan application, etc.), I20 Form (international students), child's birth certificate, letter of circumstances *Please call the team for more information: 571-472-5880.	<b>Other Residency-Related Documentation that may be requested include (but are not limited to)*:</b> Lease agreement, receipt for personal property tax in Virginia or real estate taxes paid within the last year to the Commonwealth of Virginia or a Virginia locality, Virginia Department of Education Certificate of Enrollment, immigration residency certification document, W2 *Please call the team for more information: 571-472-5880.

**IMPORTANT:** Failure to submit the required signed and dated application and required documentation for proof of individual/family income and residency will result in the DENIAL of your application. If you are denied for financial assistance, the outstanding balance will remain as patient responsibility, and you will receive Inova patient billing statements for the amount due.

Please allow 30 days for our team to review and determine your eligibility for Financial Assistance. Additional documentation may be requested and submitted during this time. A decision letter will be sent to you via certified mail and/or will be visible in MyChart within that 30-day term defined within Inova's Financial Assistance Policy Requirements.

**For questions, please call the Inova Financial Assistance Team: 571-472-5880.**

## How to submit your completed/signed financial assistance application including proof of income and residency

### **MyChart**

Upload completed and signed application and all required residency and income documentation to MyChart:

**Log in or create an account within MyChart: <https://mychart.inova.org/mychart>**

1. Once logged in, navigate to the menu in the top left-hand corner of the home screen.
2. Scroll down to the "Billing" Category and select "Financial Assistance."
3. Complete each screen and upload a completed and signed Application, as well as your income and residency documents that are required in the designated order as prompted.
4. Once all documents have been uploaded and appropriate fields have been filled in within each screen, click Submit.

The processing team will then begin the review of your case and communicate status of your submission and approval or denial decision, or a request for additional documentation if needed.

### **Mail**

Mail the completed and signed application and all required residency and income documentation to:

Inova Patient Financial Services  
Attn: Rev Cycle Financial Assistance Department  
8095 Innovation Park Drive  
Fairfax VA 22031

**This location does not accept patient walk-ins.**

### **Fax**

Fax the completed and signed application and all required residency and income documentation to:

Fax #: 571-665-6895  
Attn: Rev Cycle Financial Assistance Department

### **Drop Off**

Drop off your completed and signed application and all required residency and income documentation to:

Inova Partnership for Healthier Communities  
2700 Prosperity Ave., #280  
Fairfax VA 22031

7617 Little River Turnpike, Suite 850  
Annandale, VA 22003

Monday to Friday 8:30am – 5:00pm  
(In person assistance available Monday to Friday 8:30am – 12:00pm.)