

## Financial Documentation Checklist for Burnett Calvert Hospice House



To be completed if patient is applying for sliding scale.

Please provide the following as minimum documentation required to apply for a sliding scale rate at the Burnett Calvert Hospice House.

Patient Name: \_\_\_\_\_ DOB: \_\_\_\_\_  
Checklist Completed By: \_\_\_\_\_ Date: \_\_\_\_\_

### ASSETS

#### Income (most recent):

- Social Security Statement
- Disability Statement
- Pension Statement
- Earnings Statement
- Support (child support, alimony)
- Tax Returns (previous 2 years)
- Other Income (rental, business, gift, etc.)

#### Accounts (Past 3 months):

- Checking Account
- Savings Account
- Money Market Account
- Certificates of Deposit
- Stocks and Bonds
- Annuities
- Trusts
- IRA

### EXPENSES

#### Expenses (Past 3 months):

- Life Insurance Premium\*
- Health Insurance Premium\*
- Long-Term Care Insurance Premium\*
- Medication Co-Pays\*

\*These are the only allowable expenses if there is no dependent living in the home

#### Expenses (Past 3 months):

- Mortgage or Rent
- Property Taxes
- Electric
- Gas
- Water/Sewer
- Food
- Car Payment (one vehicle)
- Care Insurance (one vehicle)
- Phone
- Cable

When the above required documentation has been gathered, please contact the assigned social worker to arrange submission of documentation and determination of the daily rate.

The full daily rate will be applied until all items on the Financial Documentation Checklist have been submitted and a reduced rate has been offered. The reduced rate will go into effect on the date that the Financial Worksheet has been signed, with no refund for days previously paid at the full rate.

It is recommended that copies of all documents be provided, as they will become part of the patient's record. These documents will be used only to determine if a reduced rate for Burnett Calvert Hospice House is applicable.