



# Financial Assistance

New Patient Appointment

or 214-645-8300



UT Southwestern Medical Center provides care for the most vulnerable patients in the community, including patients with financial hardships.

## Charity Care and Financial Assistance

Our mission is to enhance the health of people in the state of Texas, including those in the community who are most vulnerable, such as patients with financial hardships. At the same time, UT Southwestern must preserve its fiscal integrity and strength for the future.

The following information is provided about charity care and financial assistance as a resource to patients and families. For applications and complete eligibility information, please call 214-633-4036.

### Who Is Eligible for Financial Assistance?

UT Southwestern provides financial assistance to Texas residents who:

- Meet the eligibility requirements for the UT Southwestern Charity Care Program (henceforth referred to as the Program)
- Have no other means to meet their financial obligations to UT Southwestern hospitals and physicians
- Have completed an application for assistance and have been approved in the screening process

Even if a patient is financially eligible for the Program, he or she might not qualify for assistance through it. The availability of institutional resources needed for a particular patient's medical care and the overall resources needed for patients already in the Program must be taken into account.

the diagnosis, urgency, or level of care required. A special request for an exception to the residency requirement must come from a physician, and it must be approved in writing by the Executive Vice President for Health System Affairs before the patient begins the application process.

## What About Medical Emergencies?

Any individual, regardless of ability to pay, who comes to a UT Southwestern Medical Center property, including the University Hospital Emergency Department, for a potential emergency medical condition or emergency services will receive an appropriate medical screening examination, consistent with University Hospital Policy UHRI 1-1 04 Emergency Medical Treatment and Labor Act (EMTALA). UT Southwestern is committed to fulfilling EMTALA and ensuring that neither the initial medical screening nor lifesaving treatment will be impeded by inquiries about the individual's method of payment or insurance status.

# More Information About the Program

The purpose of the Charity Care Program policy is to:

- Define the eligibility criteria for qualified Texas residents applying for the Program and subsequent charity care discounts
- Define the process by which patients are evaluated for assistance
- Provide guidelines that will ensure consistency in the Program's review and approval process

## Eligibility

Program eligibility for full or partial charity care discounts is based on the eligibility criteria, which are indexed to the published Federal Poverty Guidelines (FPG) in place at the time of consideration for eligibility.

Charity care discounts can also be allowed for coinsurance and deductible amounts. As long as the patient continues to qualify for the Program, the qualifying application and status will be valid for the effective period (which can be less than, or at most equal to, one year). The Program will recheck a participant's financial status periodically during the effective period.

Elective and nonmedically necessary services will not be considered for charity care discounts. Medically necessary services that are not covered under an individual's payor plan might be covered by the Program. Parkland Health Plus, a charity care program within Parkland Health & Hospital System, is not a recognized payor under the Program.

## Eligibility Requirements

- Generally, a patient qualifies for the category of Financially Indigent (100% discount) if the patient is uninsured or underinsured, and their annual household income is at or below 400% of the FPG.
- A patient qualifies for the category of Medically Indigent (partial discount) if the patient's balance exceeds the patient's annual household gross income by 100%, after any and all discounts or insurance adjustments have been applied.
- Prior to consideration for financial assistance a verification of eligibility of alternate funding sources will be required. Examples include Medicare, Medicaid, commercial (employer based workers compensation/disability/COBRA), county public assistance programs, and any third party liability.

**Summary of Eligibility Criteria and Discount Amounts**

**Financially indigent:** A patient qualifies for the category of financially indigent if the patient is uninsured or underinsured and the patient's annual household income is at or below 400% of the FPG, based on the number of people in the household and/or propensity to pay. Approved applicants are still responsible for any deposits or amounts indicated in any financial agreements and might receive a bill for any balances due. However, those amounts or deposits might be addressed by the charity care discount, which is 100% for the Financially Indigent category.

**Medically indigent:** A patient qualifies for the category of medically indigent if the patient's medical balance exceeds the annual gross household income by 100%. UT Southwestern considers the patient's ability to pay without liquidating assets critical to living or earning a living (such as home, car, personal belongings, etc.) and the patient's outstanding UT Southwestern balance for both facility and professional fees as a percentage of the applicant's household income. The charity care discounts for the medically indigent category are:

- If the percentage of patient balance to income is 100% to 150%: 40% income owed toward patient balance
- If the percentage of patient balance to income is 151% or greater: 20% income owed toward patient balance

## Evaluation

UT Southwestern uses three processes to determine whether a patient can enter the Program:

- Determining what institutional funds and resources are available for such care
- Prioritizing requests for care
- Determining a patient's eligibility for charity care discounts

## How to Apply

To apply for financial assistance, please download the application form in English (PDF), in Spanish (PDF), or visit MyChart.

You can also request a copy of the form:

- **In person:** William P. Clements Jr. University Hospital Admission Office
- **By phone:** Call 214-633-4036
- **By mail:** UT Southwestern Medical Center (Mail Code 9233), Attn: Financial Assistance, P.O. Box 36423, Dallas, Texas 75235-9662
- **By email:** FinancialAssistance@UTSouthwestern.edu

# Definitions of Terms Used in the Program

**Applicant:** An individual who applies to the UT Southwestern Charity Care Program (the Program) for a charity care discount. Generally, this is the patient unless the patient is a minor child or has a legal guardian, in which case the applicant is the parent or legal guardian of the patient. When a patient is a child or has a legal guardian, the evaluation will generally be based on the patient's Texas residency and citizenship status, and the income/asset evaluation will be based on the household income as defined. If the patient is a child whose custodial parent is a Texas resident, then the child can be considered a Texas resident.

**Assets:** Resources including, but not limited to, the following:

- Cash
- Checking and savings accounts
- Certificates of deposit
- Stocks
- Bonds
- Other securities
- Equity value of real or personal property, including income-producing property but excluding primary residence and vehicle
- Retirement accounts

**Dependent:** A spouse, minor child, or parent whose family member is responsible for his or her support (see definition of Family)

persons who [illegible] the financial affairs of the patient, to whom the patient is legally responsible. The family might or might not live in the same home as the patient (e.g., custodial parent living away). This designation includes legal guardians, anyone who has claimed the patient as a dependent on his or her most recent federal income tax return, or anyone who takes the federal elderly income tax credit for the patient on his or her most recent federal income tax return. Spouses are included in this definition. Spouses who live apart but are not divorced are included, unless it can be demonstrated that they have lived apart for at least two years, with separate addresses, separate financial accounts, and separate income tax returns. Common law or informal marriages are included in the family definition if either of the following conditions is met:

- The couple has filed a declaration of informal marriage, or
- The couple meets all of the following conditions:
  - They have made a declaration of their marriage under Section 1.92 of the Texas Family Code on a form prescribed by the Bureau of Vital Statistics, and
  - They have agreed to be married and, after the agreement, have been living together in Texas as husband and wife and representing to others that they are married.

For the purposes of this policy, “family” does not include noncustodial parents who are not legally obligated to support the applicant or who do not claim the applicant as a Dependent; adult (age 18 or over) children or siblings with no financial responsibility for the applicant; friends; renters; or any others not financially responsible for the applicant.

Federal Poverty Guidelines (FPG): Guidelines issued each year in the Federal Register by HHS are a simplification of the poverty thresholds for use for administrative purposes – for instance, determining financial eligibility for certain federal programs.

Household Income: Money or its equivalent received by those who are legally responsible for the support of the patient, who claim the patient as a dependent or tax credit, or who are defined as family in this policy. If an applicant has received voluntary support from someone who is not legally obligated to provide support, the amount of that support should be considered as part of the applicant’s total income and documented, but the total income of the person providing that support is not considered. The value of anticipated or future voluntary income or gifts cannot be considered.

Medically Necessary Service: A treatment that is reasonable and medically necessary for the diagnosis or treatment of illness or injury or that improves the functioning of a malformed body member, consistent with the applicable standard of care, and that is not considered an elective procedure or treatment.

Patient Balance: The medical expenses that are the responsibility of a patient after any and all applicable third-party coverage payments, discounts, or contractual adjustments have been applied.

Primary Residence: The address at which a person resides most of the time, considers as his or her home, and

- Has been admitted to the U.S. under the following designations: as an asylee or refugee; an alien whose deportation is being withheld; a Cuban or Haitian entrant; an Amerasian lawful permanent resident; a victim of severe trafficking; a U.S. military active-duty service member's or veteran's spouse or dependents; special immigrants from Iraq and Afghanistan; or the alien battered spouse or child(ren) of a U.S. military active-duty service member or veteran, regardless of the length of residence in the United States.

An alien whose presence in the United States is based solely upon a non-immigrant visa (e.g., student visas, work permits, visitors' permits, or other temporary circumstances) is not a qualified legal alien.

- Note: Qualified alien status is not required for emergent or unplanned services (e.g., Emergency Department outpatients or Emergency Department-generated admissions).

Texas Resident: A person who:

- Physically and lawfully resides within the geographic boundaries of the state of Texas for at least six months prior to the date of the application for a financial discount.
- Maintains a permanent residence (e.g., house, apartment, or trailer, and not just a post office box) in Texas. If the applicant cannot show a permanent physical residence, then a notarized letter of support can be provided.
- Claims permanent residency in Texas and can provide two residence proofs found in the verification sources document.
- Is a minor child residing in Texas, with at least one parent, managing conservator, guardian and/or other person or entity with primary legal responsibility for the child who is a Texas resident.
- If claimed as a dependent of a parent or guardian, is not an emancipated adult and is enrolled and attending a post-secondary educational institution outside Texas, maintains permanent residency in Texas, and does not claim residency in any other state for tuition purposes; or
- Does not claim permanent residency in any other state or country and is not eligible to receive or does not receive any of the following benefits in another state or country:
  - Has the right to vote in another state or country, unless holding dual citizenship in that country;
  - Owns a primary residence in another state or country, although the ownership of second homes or property is acceptable;
  - Pays personal state income tax in another state;
  - Receives homestead tax benefits in another state or country, unless holding dual citizenship in that country;
  - Is registered (or has custodial children registered) and attends elementary or secondary school in another state or country, unless holding dual citizenship in that country; or

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UT Southwestern Medical Center

## Main Location

5323 Harry Hines Blvd.
Dallas, TX 75390

## General Inquiries

214-648-3111

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