

## Appendix C

### Financial Assistance - Required Documentation Checklist

Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Patient \_\_\_\_\_

Medical Record # or Guarantor # \_\_\_\_\_

**Dear Patient/Guarantor:**

In addition to completing the Inova Financial Assistance application, you will need to provide proof of your income and residency. Note that certain documents can be used for both income and residency documentation.

<b>Income Documentation</b>
Proof of Family Income - Spouse or Domestic Partner income is needed <b>Must include at least two (2) of the following documents:</b>
Two Recent Paystubs
Most Recent Federal Income Tax Return <i>(**Instructions Below**)</i>
Monthly Bank Statement with Applicant's Name and Current Address <i>(Must be issued by a bank within the last 90 days reflecting deposits)</i>
Notarized Verification of Employment <i>(Form/Letter completed By Employer)</i>
Notarized Verification of Support <i>(Form/Letter completed by Spouse/Partner/Self-Declaration)</i>
Government Assistance Program/Public Assistance Benefit Letter
Social Security Benefit Letter
I20 Form (International Students)
Pension/Retirement Income
Survivor Benefits
Unemployment Compensation
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 <i>(Home Lease, Purchase Application, Automobile Lease, Loan Application, etc.)</i>

<b>Residency Documentation</b>
Proof of 90 days residency within the Inova Service Area <b>Must include at least two (2) of the following documents:</b>
Valid Virginia Issued Driver License or Identification Card <i>(Must be issued at least 90 Days prior to date of service)</i>
Most Recent Federal Income/State Income Tax Return <i>(**Instructions Below**)</i>
Monthly Bank Statement with Applicant's Name and Current Address <i>(Must be issued at least 90 Days prior to date of service)</i>
Notarized Verification of Residency <i>(Form/Letter completed by Landlord)</i>
Utility Bill (Gas, Electric, Sewer, Water, Cable etc.) with Applicant's Name and Current Address <i>(Must be issued at least 90 Days prior to Date of Service)</i>
Current Auto Insurance Policy or Home Insurance Policy Bill with Applicant's Name and Current Address
Lease Agreement
Virginia Voter Registration Card
Receipt for personal property taxes 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 form
Certified copy of school records/transcripts issued by a school accredited by a U.S. state jurisdiction or territory
DMV Records
Immigration Residency Certification Document
W2

<b>Multi-Use Documentation</b>
The following items can be used as proof of (1) Income and (1) Residency in one document:
Most Recent Federal Income Tax Return <i>(**Instructions Below**)</i>
Monthly Bank Statement with Applicant's Name and Current Address <i>(Must be issued by a bank within the last 90 days)</i>
Notarized Verification of Support <i>(Form/Letter completed by Spouse/Partner/Self-Declaration)</i>

**Failure to submit the requested documents will result in the DENIAL of your application, leaving you responsible for the entire balance.** For any question or if you need more time to gather the documents requested, please call 571-423-5880. If you prefer to send the verifications via fax, please fax to 571-423-5886.

**\*\*Tax Return** – When submitting taxes completed by a firm or business please submit full document with date and signature. When submitting self-prepared taxes, please submit full documentation signed and dated.

**Once verifications of income, residency and family size are received, please allow 30 days for processing**

===== **IMPORTANT!** =====

<p><b>Attach documents to this sheet and mail within fifteen (15) days to:</b></p>	<p><b>Inova Health System Patient Financial Services 8095 Innovation Park Drive, Suite 501 Fairfax, VA 22031</b></p>
--	--