

## 9.8 SAMPLE DETERMINATION OF INCOME POLICY

(See MT TX FP Administrative Manual, Policy 3.4, *Determination of Income*)

**Policy:** These policies have been prepared to ensure that client's income is accurately and consistently assessed to reduce any financial burden on clients. To ensure the client sliding-fee-scale discount is applied consistently, appropriately and accurately; to ensure that gross revenue and client sliding-fee-scale discounts are recorded in an accurate and timely manner; and to ensure outstanding client account balances are billed in an accurate and timely manner on a pre-determined schedule, outlined by the family planning programs policies and procedure.

**Procedure:**

The family planning program staff will determine the eligibility of all clients for discounted fees. The eligibility process varies between programs due to the requirements of each program.

The following list indicates what income is accepted, but it is not intended to be all inclusive:

1. Previous year's Income Tax return.
2. Most recent two consecutive (2) pay stubs.
3. If a client does not file income tax returns and does not get paid with checks, a letter from the employer may be accepted as proof of income.
4. Cancelled checks or bank statements
5. Unemployment check stub or web verification
6. Disability check stubs or automatic deposit slips
7. Pension/retirement statements
8. Client statement of income for self-employment

The Director has the authority to approve other types of income verification on a case-by-case basis.

Clients who refuse to provide income information are considered full fee. Clients will be considered full fee until they are unable to provide appropriate documentation, if a client is unable to provide documentation, the clients' verbal declaration will be used.

A schedule of eligibility will be determined annually for households with income from 0 - 250% of the Federal Poverty Level (FPL). Eligibility will be based on household income and family size. Eligibility discounts for minors seeking confidential Title X services will be based on the following:

Adolescent's income should be used when:

- a. The adolescent is self-supporting;
- b. The adolescent is supported by a parent or guardian but requests confidential services; or
- c. The adolescent is supported by a parent or guardian but parents are unwilling to pay for services.

Family income should be used when

- a. The adolescent is partially or completely supported by a parent or guardian who is willing to pay

The sliding fee discount for Title X family planning services will be as follows:

<b>Category</b>	<b>Discount</b>	<b>Amount/Fee</b>
Income Category A (0 – 100% of poverty)	100%	\$0
Income Category B (101 – 137% of poverty)	80%	20% of Usual and Customary Charges
Income Category C (138 – 175% of poverty)	60%	40% of Usual and Customary Charges
Income Category D (176 – 213% of poverty)	40%	60% of Usual and Customary Charges
Income Category E (214 – 250% of poverty)	20%	80% of Usual and Customary Charges
Income Category F (Above 250% of poverty)	0%	100% of Usual and Customary Charges

Or

<b>Category</b>	<b>Discount</b>	<b>Amount/Fee</b>
Income Category A (0 – 100% of poverty)	100%	\$0
Income Category B (101 – 150% of poverty)	75%	25% of Usual and Customary Charges
Income Category C (151 – 200% of poverty)	50%	50% of Usual and Customary Charges
Income Category D (201 – 250% of poverty)	25%	75% of Usual and Customary Charges
Income Category E (Above 250% of poverty)	0%	100% of Usual and Customary Charges

INCOME SOURCES FOR TITLE X SERVICES

<b>Do consider</b>	<b>Don't consider</b>
Wages	Social security disbursements
Salary	Food or rent in lieu of wages (if not claimed on taxes)
Training stipends	Military allotments
Net receipts from self-employment (after deductions for business expenses)	Tax refunds
Strike benefits from union funds	Child support
Capital gains	Lump-sum inheritances
Alimony	One-time insurance payments or compensation for injury
Gifts (over \$14,000)	Non-cash benefit such as: Employer-paid or union-paid portion of health insurance; other employee fringe benefits
Regular support from absent family member or someone not living in the household	Assistance from federal aid Programs like Medicaid, food Stamps, public housing, TANF, SSI
Private pensions	
Regular insurance or annuity payments	
Income from dividends	
Interest rent, royalties	
Food or rent in lieu of wages (if claimed on taxes)	
Assets drawn down as bank withdrawals (if claimed on taxes)	
Proceeds from sale of house car or property (if claimed on taxes)	
Periodic receipts from estates or trusts (if claimed on taxes)	

Adapted from the Affordable Care Act (ACA) Medicaid Eligibility Criteria, 2015