Texas Nonprofit Hospitals *
Part II
Summary of Current Hospital Charity Care Policy and Community Benefits
for Inclusion in DSHS Charity Care Manual as Required
by Texas Health and Safety Code, § 311.0461**
2015

<table>
<thead>
<tr>
<th>Facility Identification (FID):</th>
<th>1135113 (Enter 7-digit FID# from attached hospital listing)***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Hospital:</td>
<td>Methodist Charlton Medical Center (MCMC)</td>
</tr>
<tr>
<td>County:</td>
<td>Dallas</td>
</tr>
<tr>
<td>Mailing Address:</td>
<td>P.O. Box 655999, Dallas, TX 75265-5999</td>
</tr>
<tr>
<td>Physical Address if different from above:</td>
<td>3500 W. Wheatland Road, Dallas, TX 75237</td>
</tr>
<tr>
<td>Effective Date of the current policy:</td>
<td>06/25/2015</td>
</tr>
<tr>
<td>Date of Scheduled Revision of this policy:</td>
<td>06/25/2016</td>
</tr>
<tr>
<td>How often do you revise your charity care policy?</td>
<td>Periodically as needed</td>
</tr>
</tbody>
</table>

Provide the following information on the office and contact person(s) processing requests for charity care.

| Name of the office/department: | Centraal Business Office (CBO) |
| Mailing Address:               | P.O. Box 655999, Dallas, TX 75265-5999 |
| Contact Person:                | Jim Perez                       |
| Title:                         | Director, CBO                   |
| Phone:                         | (214) 947-6377                  |
| Fax:                           | (214) 947-6322                  |
| E-Mail                         | jamesperez@mhd.com              |

Person completing this form if different from above:

| Name:                         | Larry Whitson                   |
| Phone:                        | (214) 947-6452                  |

* This summary form is to be completed by each nonprofit hospital. Hospitals in a system must report on an individual hospital basis. Public hospitals, for-profit hospitals participating in the Medicaid disproportionate share hospital program and exempt hospitals are not required to complete this form. This form is only available in PDF format at DSHS web site: www.dshs.state.tx.us/chs/hosp under 2015 Annual Statement of Community Benefits Standard.

** The information in the manual will be made available for public use. Please report most current information on the charity care policy and community benefits provided by the hospital.

*** The list is also available on DSHS web site: www.dshs.state.tx.us/chs/hosp/.
I. Charity Care Policy:

1. Include your hospital’s Charity Care Mission statement in the space below.

As part of its mission, Methodist Health System provides Financial Assistance to patients who lack ability to pay for hospital service.

2. Provide the following information regarding your hospital’s current charity care policy.
   a. Provide definition of the term charity care for your hospital.

   Patients eligible for charity consideration will include both Financially Indigent and Medically Indigent applicants who have adequate resources to pay for services provided. Financially Indigent patients include those patients who are uninsured or under insured, whose annual income is equal to or less than the Federal Poverty Guidelines, as published each February in the Federal Register, and who have no ability to pay for their medical care. Medically Indigent patients include those patients who are capable of paying for their living expenses, but whose medical and hospital bills, after payment by third party payers, would require use of or liquidation of income and/or assets critical to living or earning a living.

   b. What percentage of the federal poverty guidelines is financial eligibility based upon? Check one.

   1. 100%
   2. <133%
   3. <150%
   4. <200%
   5. Other, specify

   c. Is eligibility based upon net or gross income? Check one.

   d. Does your hospital have a charity care policy for the Medically Indigent?  
   
   YES
   NO

   IF yes, provide the definition of the term Medically Indigent.

   Medically Indigent patients include those patients who are capable of paying for their living expenses, but whose medical and hospital bills, after payment by third party payers, would require use of or liquidation of income and/or assets critical to living or earning a living.

   e. Does your hospital use an Assets test to determine eligibility for charity care?  

   YES  NO

   If yes, please briefly summarize method.

   f. Whose income and resources are considered for income and/or assets eligibility determination?

   1. Single parent and children
   2. Mother, Father and Children
   3. All family members
   4. All household members
g. What is included in your definition of income from the list below? Check all that apply.

- [x] 1. Wages and salaries before deductions
- [x] 2. Self-employment income
- [x] 3. Social security benefits
- [x] 4. Pensions and retirement benefits
- [x] 5. Unemployment compensation
- [x] 6. Strike benefits from union funds
- [x] 7. Worker’s compensation
- [x] 8. Veteran’s payments
- [x] 9. Public assistance payments
- [x] 10. Training stipends
- [x] 11. Alimony
- [x] 12. Child support
- [x] 13. Military family allotments
- [x] 14. Income from dividends, interest, rents, royalties
- [x] 15. Regular insurance or annuity payments
- [x] 16. Income from estates and trusts
- [x] 17. Support from an absent family member or someone not living in the household
- [x] 18. Lottery winnings
- 19. Other, specify ____________________________

3. Does application for charity care require completion of a form? [x] YES  NO

If YES,

a. Please attach a copy of the charity care application form.

b. How does a patient request an application form? Check all that apply.

- [x] 1. By telephone
- [x] 2. In person
- [x] 3. Other, please specify Email ____________________________

 c. Are charity care application forms available in places other than the hospital?
☐ YES  NO  If, YES, please provide name and address of the place.
Central Business Office, 4040 N. Central Expressway, Suite 601, Dallas, TX 75240

4. When evaluating a charity care application,
   a. How is the information verified by the hospital?
      1. The hospital independently verifies information with third party evidence
         (W2, pay stubs)
      2. The hospital uses patient self-declaration
      ☑ 3. The hospital uses independent verification and patient self-declaration
   b. What documents does your hospital use/require to verify income, expenses, and assets? Check all that apply.
      ☑ 1. W2-form
      ☑ 2. Wage and earning statement
      ☑ 3. Pay check remittance
      ☑ 4. Worker’s compensation
      ☑ 5. Unemployment compensation determination letters
      ☑ 6. Income tax returns
      ☑ 7. Statement from employer
      ☑ 8. Social security statement of earnings
      ☑ 9. Bank statements
      ☑ 10. Copy of checks
      ☑ 11. Living expenses
      ☑ 12. Long term notes
      ☑ 13. Copy of bills
      ☑ 14. Mortgage statements
      ☑ 15. Document of assets
      ☑ 16. Documents of sources of income
      ☑ 17. Telephone verification of gross income with the employer
      ☑ 18. Proof of participation in gov’t assistance programs such as Medicaid
      19. Signed affidavit or attestation by patient

http://www.dshs.state.tx.us/chs/hosp/
20. Veterans benefit statement

21. Other, please specify Credit Bureau Reports, Notifications of Bankruptcy, and Asset Searches

5. When is a patient determined to be a charity care patient? Check all that apply.

- a. At the time of admission
- b. During hospital stay
- c. At discharge
- d. After discharge
- e. Other, please specify __________________________

6. How much of the bill will your hospital cover under the charity care policy?

- a. 100%
- b. A specified amount/percentage based on the patient’s financial situation
- c. A minimum or maximum dollar or percentage amount established by the hospital
- d. Other, please specify __________________________

7. Is there a charge for processing an application/request for charity care assistance?

YES ☑ NO

8. How many days does it take for your hospital to complete the eligibility determination process?
Approximately three weeks
9. How long does the eligibility last before the patient will need to reapply? Check one.
   - a. Per admission
   - b. Less than six months
   - c. One year
   - d. Other, specify ________________________________

10. How does the hospital notify the patient about their eligibility for charity care? Check all that apply?
   - a. In person
   - b. By telephone
   - c. By correspondence
   - d. Other, specify ________________________________

11. Are all services provided by your hospital available to charity care patients?
   - YES ✓ NO
   
   If NO, please list services not covered for charity care patients (e.g. transplant services, ER services, other outpatient services, physician’s fees). Bariatric surgeries, cosmetic surgeries, and transplant services are not covered under our Financial Assistance Program.

12. Does your hospital pay for charity care services provided at hospitals owned by others?
   - YES ✓ NO
II. Community Benefits Projects/Activities:
Provide information on name, brief description (3 lines), target population or purpose (3 lines) for each of the community benefits projects/activities CURRENTLY being undertaken by your hospital (example: diabetes awareness).

Please refer to the narrative located just before Tab A of the hardcopy submitted to the Texas Department of State Health Services, Center for Health Statistics, Hospital Survey Unit.

Additional Information:
Use this space if more space is required for comments or to elaborate on any of the information supplied on this form. Please refer to the response by question and item number.

On Worksheet 1 on Part 1 of the report: charity charge write-offs are not separated in accounting records between Medically Indigent and Financially Indigent.
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NOTE: This is the fourteenth year the charity care and community benefits form is being used for collecting the information required under Texas Health and Safety Code, § 311.0461. If you have any suggestions or questions, please include them in the space below or contact Dwayne Collins, Center for Health Statistics, Texas Department of State Health Services at (512) 776-7261 or fax: (512) 776-7344 or E-mail: dwayne.collins@dshs.state.tx.us.

Name of Hospital: __________________________________ City: ______________________
Contact Name: ___________________________ Phone: ______________________

Suggestions/questions: