

**^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\*\*  
2023**

**Facility Identification (FID):** 4396591 (Enter 7-digit FID# from attached hospital listing)\*\*\*

**Name of Hospital:** Methodist Southlake Medical Center **County:** Tarrant

**Mailing Address:** PO Box 655999, Dallas, TX 75262-5999

**Physical Address if different from above:** 421 E State Hwy 114, Southlake, TX 76092

**Effective Date of the current policy:** 01/23/2023

**Date of Scheduled Revision of this policy:** 01/23/2024

**How often do you revise your charity care policy?** Yearly

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

Name of the office/department: Central Business Office (CBO)

Mailing Address: PO Box 655999 c/o CC 90840, Dallas, TX 75265-5999

Contact Person: Mitch Taylor Title: Director of Patient Accounts

Phone: 2149476300 Fax: \_\_\_\_\_

Person completing this form if different from above:

Name: Leslie Pierce Phone: 2149474583

\*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.texas.gov/chs/hosp](http://www.dshs.texas.gov/chs/hosp) under 2023 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: <http://www.dshs.texas.gov/chs/hosp/>

**I. Charity Care Policy:**

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

As part of it's mission, Methodist Health System provides Financial Assistance to patients who lack ability to pay for hospital services.

2. Provide the following information regarding your hospital’s current charity care policy.

a. Provide definition of the term **charity care** for your hospital.

Financially Indigent means a patient meets the following two criteria: (i) who is uninsured or underinsured; and (ii) whose annual income is equal to or less than 200% of the Federal Poverty guidelines as published each February in the Federal Register, and who have no ability to pay for their medical care.

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

4

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 means a patient with medical or hospital bills from MHS, after payment by all third parties, are equal to or greater than 5% of the patient’s yearly household income and whose annual income is greater than 200% but less than or equal to 500% of the federal poverty guidelines

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

YES NO If yes, please briefly summarize method. The determination of the ability to pay may take into account a number of variables, including but not limited to: a) the earning status and potential of the patient and family; b) other sources of income and assets; c) the level and type of liabilities; d) the ability to obtain additional credit; e) the amount and frequency of hospital/medical bills; and family size.

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

5. Other, please explain \_\_\_\_\_

g. What is included in your definition of income from the list below? Check all that apply.

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

3. Does application for charity care require completion of a form? 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.

- 1. By telephone
- 2. In person
- 3. Other, please specify By mail, MHS website and/or 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 75204

d. Is the application form available in language(s) other than English?

YES  NO

If yes, please check

Spanish  1 Other, please specify Vietnamese, Korean, Arabic, Mandarin

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. Paycheck 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
20. Veterans benefit statement
21. Other, please specify Credit Inquiry or other public data

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 3 weeks upon submission of all required documents

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 180 days post the application approval date

10. How does the hospital notify the patient about their eligibility for charity care? Check all that apply.  
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). Procedures that are deemed not an emergency or medically necessary including, but not limited to, Bariatric surgeries, cosmetics surgeries, and CT Calcium Scoring are not covered by this policy.

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 2 on Part 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 twenty-third 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.texas.gov](mailto:dwayne.collins@dshs.texas.gov).

Name of Hospital: \_\_\_\_\_ City: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Suggestions/questions:**