Verifying Client Income When Scheduling an Appointment

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Follow these steps and sample scripts to ensure alignment with Title X Program Expectations of reasonable efforts to verify a client's income when scheduling an appointment.

STEP 1
Explain the need for income information

We ask all our clients to provide income information at check-in to figure out the appropriate fee based on your income. This helps us provide you with the appropriate discount for the services you receive today.

Do you have any questions?

STEP 2
Present options for documentation

We ask all our clients to bring proof of income to their appointment. We accept a recent pay stub, a benefits letter, or any similar document; this can be a physical copy or an image on your phone.

STEP 3
Address client concerns with sensitivity

We understand that this is personal. We ask these questions of all our clients. Our goal is to make sure we are providing affordable services. At check-in, our staff approach your visit with deep care, respect, and privacy.

[*Add what your agency does to ensure privacy for clients, such as playing music, having white noise machines, or conducting client intake in a private space.*]

STEP 4
Offer help

If you have any questions or concerns about this process, please let me know. I'm here to help and make this as easy as possible for you.

STEP 5
Assure confidentiality

Everything you tell us is private. We only use it to figure out how much you need to pay for today's visit.

STEP 6
End on a positive note

Thank you for helping us with this process. Let me know if there's anything else you need today.

Note: For individuals who are uninsured or self-pay, refer to the 45 CFR § 149.610(b), which outlines the requirements for providing a good faith estimate to uninsured or self-pay individuals.

Verifying Client Income
At Appointment Check-in

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Follow these steps and sample scripts to ensure alignment with Title X Program Expectations of reasonable efforts to verify a client's income at check-in.

STEP 1
Explain the need for income information

We are excited to care for you and your health needs today. Before we get you in a room to talk to the provider, we need to collect your income information. We ask all our clients to provide this information at check-in to figure out the appropriate fee based on your income. This helps us provide you with the appropriate discount for the services you receive today.

Do you have any questions?

STEP 2
Present options for documentation

When you scheduled your appointment, we shared that we accept a recent pay stub, a benefits letter, or a similar document. Do you have a physical copy or an image on your phone today?

If a client doesn't have proof of income: "If you don't have proof of income, that's okay. You can tell me your family size and income. At your next visit, please bring your documents."

If a client refuses to self-declare: "You will still be seen by your provider and receive the care you need, but since you can't share your family size or income, we will not be able to apply any discounts and will have to charge you full fee for today's visit."

STEP 3
Address client concerns with sensitivity

We understand that this is personal. We ask these questions of all our clients. Our goal is to make sure we are providing affordable services.

Is there something I can do to make you more comfortable providing us with this information?

STEP 4
Offer help

Let me know if you have any questions. I'm here to help and make this as easy as possible for you. We know your time is valuable, and we want to get you seen as soon as we can.

STEP 5
Assure confidentiality

The information you provide today is confidential and will only be used to determine your fee for today's visit.

Do you have any questions or concerns?

STEP 6
End on a positive note

Thank you for helping us with this process. Let me know if there's anything else you need today. You'll be called to see the provider soon.

Note: For individuals who are uninsured or self-pay, refer to the 45 CFR § 149.610(b), which outlines the requirements for providing a good faith estimate to uninsured or self-pay individuals.

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