

Household Size and Income Worksheet

Upload **COMPLETED** worksheet and supporting documentation to Portals or Fax to 800-282-7692

HealthWell Identification Number:

Place a checkmark on the box next to the income documentation you will submit with this worksheet for your entire household and write in the current number of household members, including you, the grant recipient.

If you file taxes, you are required to submit your Federal 1040 Tax Return; please read below:

- If submitting income before federal Tax Day, the previous year's Federal 1040 Tax Return is acceptable unless you already filed taxes in the current year.
- If submitting income after federal Tax Day, the current year's Federal 1040 Tax Return is required.
- If you claimed medical and dental expenses, please also include Schedule A.

Federal 1040 Tax Return from most recent tax year

- Current Household Size (including you) _____
 - If household size or income situation is different from what is indicated on the 1040, please provide an explanation (include a letter if needed):

If you are exempt or not required to file a tax return, submit your Form W-2 and/or Form 1099 from the previous year (or a benefits verification letter for the current year) if applicable for your household income. If you do not have a W-2, SSI/SSDI, or pension documentation, submit your most recent 3 consecutive pay stubs. Select from the options that apply to all members of your household.

W-2 Wage Income, Social Security Income (SSI)/Social Security Disability Income (SSDI) and/or Pension Income

- Current Household Size (including you) _____

Paystubs (3 most recent and consecutive)

- Current Household Size (including you) _____

None of the above or your financial situation has recently changed.

- Please call HealthWell at 800-675-8416, Monday through Friday from 9:00 am to 5:00 pm Eastern Time, identify yourself as a patient and select the option to speak with an **Income Specialist** to discuss the appropriate next steps.