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# Hoag Memorial Hospital Presbyterian

## Community Benefit Report

### 2023

January 1st, 2023 — December 31st, 2023

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California Department of Health Care Access and Information (HCAI)  
Facility ID #106301205

[www.hoag.org](http://www.hoag.org)

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# Executive Summary

The Community Health department at Hoag Memorial Hospital Presbyterian was established in 1995. Since its inception the program has focused on two principal strategies:

- Provide necessary healthcare-related services which are unduplicated in the community.
- Provide financial support to existing community based not-for-profit organizations which already provide effective healthcare and related social services to meet community health needs.

The Department of Community Health spearheads the organizations' efforts in the community, providing several flourishing outreach programs. The department functions with the same vision of promoting population-based health efforts. Housed within the Melinda Hoag Smith Center for Healthy Living (MHSCHL), the department focuses its efforts on improving health and well-being by providing services to the vulnerable and at-risk surrounding community. Programs include mental health services, community nurse navigation, health education and wellness programs, community-based program grants, and many more programs and services through our collaborative partnerships. In addition to these services, many other Hoag departments also provide community health services including education and support groups which are free/and or low cost to the community.

Hoag provides uncompensated care (charity) to patients who are unable to pay for the full cost of their care. These expenditures amounted to approximately \$70 million during CY 2023 (January 1, 2023 through December 31, 2023). Hoag's charity care and self-pay discount policy states that self-pay and uninsured patients who are unable to pay for the full cost of their care may qualify for charity or discounts on a sliding scale for incomes up to 400% of the federal poverty level.

Total quantifiable Community Benefit expenditures (excluding Medicare Cost of Unreimbursed Care) for CY 2023 amounted to over \$82 million.

This report provides detailed descriptions of Hoag's Community Benefit programs and services and includes quantifiable data for expenditures by programs during CY 2023.

# Chapter 1: History & Community Benefit Structure:

## Introduction

The Hoag Memorial Hospital Presbyterian Community Benefit Program was formalized in 1995 and has grown significantly since that time. We have served over 100 nonprofit community organizations in a variety of health and social service categories. We continue to emphasize the development of sustained collaborative relationships and the provision of unduplicated services to disadvantaged residents in our community as core elements of the program.

Hoag's nonprofit regional health care delivery network consists of two acute-care hospitals – Hoag Hospital Newport Beach, which opened in 1952, and Hoag Hospital Irvine, which opened in 2010 – in addition to 16 urgent care centers and 11 health and wellness centers and has delivered a level of personalized care that is unsurpassed among Orange County's health care providers. Renowned for its excellence, specialized health care services and exceptional physicians and staff, Hoag is admired as one of California's leading hospitals. It is one of the county's largest employers with approximately 8,000 employees and 2,000 volunteers. Hoag's network of more than 1,800 physicians represents 52 different specialties.

Hoag is a designated Magnet<sup>®</sup> hospital by the American Nurses Credentialing Center (ANCC) and is fully accredited by DNV. Hoag offers a variety of health care services to treat virtually any routine or complex medical condition. Through its medical staff, state-of-the-art equipment and modern facilities, Hoag provides a full spectrum of health care services including seven institutes that provide specialized services in the following areas: cancer, heart and vascular, neurosciences, women's health, digestive health, spine and orthopedics through Hoag's affiliate, Hoag Orthopedic Institute, which consists of an orthopedic hospital and four ambulatory surgical centers.

To further Hoag's commitment to provide comprehensive care to the communities we serve, Hoag Medical Group was established in 2012 with the core values of excellence, innovation, and compassion. The physician group comprises specialists and subspecialists in internal medicine, family medicine, pediatrics, geriatrics, acupuncture, neuromusculoskeletal, endocrinology, genetics, rheumatology, diabetes, allergy & immunology, and HIV medicine.

Hoag was once again the highest ranked hospital in Orange County in the 2023-2024 *U.S. News & World Report*. This marks the sixth year in a row Hoag has achieved this level of recognition. The organization was ranked the #4 hospital in the Los Angeles Metro Area and the #9 hospital in California and is the only Orange County hospital in the top 10. Additionally, Hoag was ranked #18 nationally in Orthopedics, #49 in Neurology & Neurosurgery. Hoag ranked high performing in five adult specialties, including Diabetes & Endocrinology; Gastroenterology & GI Surgery; Geriatrics; Pulmonary & Lung Surgery; and Urology, as well as high performing in 18 common adult procedures and conditions, including Aortic Valve Surgery; Chronic Obstructive Pulmonary Disease (COPD); Colon Cancer Surgery; Diabetes; Heart Attack; Heart Bypass Surgery; Heart Failure; Hip Fracture; Hip Replacement; Kidney Failure; Knee Replacement; Leukemia, Lymphoma & Myeloma; Lung Cancer Surgery; Pneumonia; Prostate Cancer Surgery; Stroke and Transcatheter Aortic Valve Replacement (TAVR).

# History

Hoag opened in 1952 as a community partnership between the Association of Presbyterian Members and the George Hoag Family Foundation, a private charitable foundation.

The George Hoag Family Foundation and the Association of Presbyterian Members represent the two founding organizations of the hospital and continue to provide leadership as corporate members of the Hoag Corporation. These members annually elect the Board of Directors, which consists of 17 members with representatives from the Hoag community and medical staff. The hospitals' Chief Executive Officer is also seated on the board as a voting member.

An annual meeting at the end of the fiscal year provides the corporate members the opportunity for the election/re-election of directors for the ensuing year.

Since its founding the hospital has welded a strong commitment to the community that it serves, including the provision of services for those who constitute a more vulnerable, at-risk population. Such care, for both inpatients and outpatients, is often only partially compensated. With excellence of management and the diligent stewardship of funds, Hoag has been able to sustain its financial strength. As a result, Hoag has been able to maintain a continuing commitment to quality of care while developing and expanding community programs and partnerships. Most of the funds expended upon Hoag's Community Benefit Program are from operating income.

For more information, visit [www.hoag.org](http://www.hoag.org).

# Mission, Vision, and Core Values

## **Hoag's Mission**

Our mission as a nonprofit, faith-based hospital is to provide the highest quality health care services to the communities we serve.

## **Vision Statement**

Hoag is a trusted and nationally recognized health care leader

## **Core Values**

Excellence

Respect

Integrity

Patient Centeredness

Community Benefit

Hoag has identified six core strategies as a means to achieve our Vision and maintain our Mission and Values:

### ***Quality and Service***

Implement the Quality Management System to drive excellence throughout the organization.

### ***People***

Develop a performance-based and integrated culture of patients, physicians and staff.

### ***Physician Partnerships***

Create and maintain commitment to the Hoag community from exceptional doctors, through sustainable and satisfying leadership opportunities and mutually beneficial economic relationships.

### ***Strategic Growth***

Implement the continuum of care strategy to provide improved access, integration and experience and experiment with new business models to create sustainability for the future.

### ***Financial Stewardship***

Achieve enterprise wide growth and financial stability while directly reducing the cost of care.

### ***Community Benefit and Philanthropy***

Improve the health of vulnerable populations in Orange County.

# Community Benefit Impact Overview

hoag.

## Community Benefit Initiatives IMPACT OVERVIEW 2023

All services are provided at no cost



192,450

Diapers  
Distributed



7,158

Door-to-Door  
Promotores Outreach  
Contacts in  
Costa Mesa



909

Provided Professional  
Training & Workforce  
Development to  
Nonprofit Partners



422

Individuals Served  
By Community  
Nurse Navigators



1,347

Participants in Health  
Education Workshops



4,314

Mental Health  
Therapy Sessions



\$30,530

Direct Aid to  
Local Families



7,630

Individuals  
Received  
Food Assistance



2,645

Participants in Mental  
Health Community  
Workshops and  
Groups



9,249

Participation in  
Integrated Health  
Services



\$107,560

Emergency Housing  
Assistance



5,027

Individuals Assisted  
with Crisis Case  
Management and  
Resource Brokering

# Department of Community Health

Hoag's mission as a nonprofit, faith-based hospital is to provide the highest quality health care services to the communities we serve. The Department of Community Health was established in 1995, to focus on two principal strategies:

- Provide necessary healthcare-related services in the community
- Provide financial support to existing community based not-for-profit organizations which already provide effective healthcare and related social services to meet community health needs

The Department of Community Health is responsible for the coordination of Hoag's Community Benefit Program and provides programs and services to improve the health of vulnerable populations. Community Benefit is embedded into the foundation of the hospital's guiding principals as one of Hoag's Core Values. Since it's founding, the hospital has welded a strong commitment to the community that it serves, including the provision of services for those who constitute a more vulnerable, at-risk population.

Housed within the Melinda Hoag Smith Center for Healthy Living (MHSCHL), the department focuses its efforts on improving the health of the community. Through a combination of in-house direct services and leveraging of existing social service programs such as Medi-Cal or CalFresh, the Department of Community Health provides a holistic approach to serving the community.

The Department's direct services and programs to the community include: mental health services; community nurse navigation and health coaching; health education and wellness programs; community-based program grants, and more through collaborative partnerships with nonprofit partner organizations.

The Department of Community Health's programs often serve as the "safety net to the safety net", filling gaps in services and resources to prevent any individual or family from falling through the cracks during a time of need. Hoag's commitment to serving the underserved and vulnerable populations highlights Hoag's investment in the community.

# Community Benefit

## Requirements

Nonprofit hospital organizations are subject to a number of regulations to maintain their tax-exempt status. These include the following requirements:

<b>1969 IRS Ruling 69-45:</b>	<b>Affordable Care Act:</b>
1) Operation of an emergency room open to all	1) Conduct a community health needs assessment (CHNA) every three years
2) A governance board composed of community members	2) Develop and adopt an implementation strategy to address the needs
3) Use of surplus revenue for facilities improvement, patient care, medical training, education, and research	3) Establish a written financial assistance policy (FAP) to describe who is eligible for charity care and how to apply
4) Inpatient hospital care for all persons in the community, including those covered by Medicare and Medicaid	4) Cap charges to patients eligible for charity care
5) An open medical staff policy	5) Make reasonable efforts to determine if a patient is eligible for charity care prior to billing/collections
<b>IRS Form 990 Schedule H:</b> an annual report of community benefit activities in:	<b>SB 697:</b> Community Benefit legislation in California
1) Charity Care	1) Conduct a community needs assessment every three years
2) Bad Debt	2) Develop a community benefit plan in consultation with the community
3) Unreimbursed Cost of Governance Programs	3) Submit a Community Benefit report to California's Department of Health Care Access and Information (HCAI) annually
4) Other activities that Benefit the Community	

Not-for-profit health care organizations demonstrate their commitment to the community by providing programs and services through:

- Free and discounted care to those unable to afford health care
- Care for the low-income and vulnerable populations
- Services designed to improve community health and increase access to health care

Community Benefits are hospital funded programs or activities that:

- Relieve/reduce government burden
- Improve access to health services
- Advance health knowledge
- Respond to an identified community need, placing particular focus on issues facing the underserved populations

The Department of Community Health operationalizes Hoag's Community Benefit efforts in achieving health equity and reducing disparities through operationalizing community benefit. In addition to these services, many other Hoag departments provide community health services including education and support groups which are free to the community.

The primary purpose of community benefit is to improve the health of the community. In addition to medical care, other factors such as, education, housing needs, and access to nutritious food impact an individual's health and well-being. These factors often referred to as social determinants in health, play an important role and influence health disparities and inequities.

**Grants Program**

Each year, Hoag's Community Benefit Grants Program provides grants to nonprofit community organizations that strive to meet the health and social service related needs of the Orange County community, with an emphasis on low income and vulnerable populations. Funding requests must address one or more of the priority focus areas and demonstrate reportable outcomes. Grant proposals are accepted on an invitation-only basis.

The eligibility criteria include:

- Organization must have operations in Orange County, CA
- Must be 501(c)(3) tax exempt organization, local government entity, or education institution
- Services are provided to disadvantaged and/or underserved populations
- Services must align with at least one of the identified priority focus areas
- Services are provided within the geographic boundaries of Orange County, CA



The Priority Focus Areas for the Community Benefit Grants Program for CY23 were:

**\$7.3M**

Community Benefit  
Grants to Local  
Nonprofits

1. Access to Health Care
2. Behavioral and Mental Health
3. Cancer/Chronic Disease

CY23 included a 12-month grant cycle from January 1, 2023 – December 31, 2023. Organizations that receive funding are required to submit a progress report, as well as a final outcomes report. In 2023, total Community Benefit grants to local nonprofits was a total of approximately \$7.3M.

# Community Benefit Philosophy

Hoag's Community Benefit Program is guided by five Core Principles:

1. *Emphasis on Disproportionate Unmet Health-Related Needs (DUHN)* - We concentrate on residents who have a high prevalence of severity for a particular health concern; and on residents with multiple health problems and limited access to timely high-quality health care.
2. *Emphasis on Primary Prevention* – We focus on program activities that address the underlying causes of persistent health problems as part of a comprehensive strategy to improve health status and quality of life in local communities.
3. *Build a Seamless Continuum of Care* – We work to develop and sustain operational linkages between clinical services and community health improvement activities to manage chronic illnesses among uninsured and publicly insured populations.
4. *Build Community Capacity* – We target our charitable resources to mobilize and strengthen existing effective community health services.
5. *Emphasis on Collaborative Governance* – We emphasize *Networking* to exchange information; *Coordination* of synergistic activities; *Cooperation* in sharing resources; and *Collaboration* to enhance the combined capacity of our community health partners.

The department provides services which are unduplicated in the community. These currently include mental health services, community nurse navigation, community-based program grants, and other health and wellness programs and services. In order to promote effective access to health care and related services, the department works in collaboration with a number of not-for-profit community-based organizations to provide insurance coverage as well as free services to underserved and vulnerable residents, many of whom are undocumented.

Charity care is an integral component of the benefit that Hoag provides to the community. The current hospital Charity Care and Self Pay Discount Policy provides assistance on a sliding scale for uninsured and self-pay patients with family incomes up to 400% of the Federal Poverty Level. The current Charity Care and Self-Pay Discount Policy is provided in Appendix A. Appendix B provides a summary of the quantifiable Community Benefit provided by Hoag in CY 2023 (January 1, 2023 to December 31, 2023). Appendix C provides a detailed breakdown of the Community Benefit expenditures by program.

# Community Benefit Committee

The role of the Community Benefit Committee ("CBC") is to establish, implement and monitor the policies and procedures that will provide the appropriate oversight and governance structure for the activities related to the Community Benefit Program at Hoag Memorial Hospital Presbyterian ("Hospital").

The CBC is a Committee of the Hoag Memorial Hospital Presbyterian Board of Directors (the "Board") and has the primary responsibility of ensuring that Hospital fulfills its moral and legal obligations to the community in serving the underserved and underprivileged through direct and indirect support of philanthropic health-related programs. CBC ensures that Hospital is in full compliance with federal and state regulations governing non-profit hospital organizations pertaining to community benefit and health-related activities.

The CBC ensures that Community Benefit activities are:

- Developed through engagement with community groups and local governmental officials in the identification and prioritization of community needs and to include mechanisms to evaluate the plan's effectiveness.
- Aligned with the mission, vision and strategic objectives/initiatives of the Hospital,
- Consistent with the Hospital's values and founding principles, and
- Developed with the input from Board, Administration and the Medical Staff leadership as appropriate.

The CBC is comprised of Hospital Board members and other members of the community and is supported by the senior management staff of the Community Health department.

## ***Service Objectives***

The service objectives of the Community Benefit program remain as initially defined:

- **Access:** To ensure adequate access to medical treatment through the availability of inpatient, outpatient and emergency medical services.
- **Services for Vulnerable Populations:** To provide health care services to uninsured, underinsured and indigent populations.
- **Education/Prevention:** To address the community health needs identified by the community health needs assessment through screening, prevention, and programs.
- **Research:** To provide new treatments and technologies to the local community through participation in primary clinical research.
- **Collaboration:** To establish and participate in collaborations which address community health priorities.
- **Coordination:** To provide case management services which coordinate medical and social services for vulnerable community residents.

# Chapter II: Community Health Needs Assessment 2022

## Overview

Hoag conducts a Community Health Needs Assessment (CHNA) as required by state and federal law. California Senate Bill 697 and the Patient Protection and Affordable Care Act and IRS section 501(r)(3) direct tax-exempt hospitals to conduct a community health needs assessment and develop an Implementation Strategy every three years. The 2022 CHNA was completed for the 3-year period 2023-2025. The CHNA is a primary tool used by the hospital to determine its community benefit plan, which outlines how it will give back to the community in the form of health and other community services to address unmet community health needs. This assessment incorporates components of primary data collection and secondary data analysis that focus on the health and social needs of the service area.

The IRS regulations allow for the conduct of joint Community Health Needs Assessments (CHNA) when hospitals define their service area communities the same. In compliance with these regulations, this CHNA was conducted jointly by Hoag Hospital Newport Beach, Hoag Hospital Irvine, and Hoag Orthopedic Institute. Project Oversight of the Community Health Needs Assessment process was overseen by: Minzah Malik, MPH, MBA Principal, Community Benefit and Lauren Tabios, MPH, MBA Supervisor, Community Benefit.

Both the CHNA Report and the Implementation Strategy (IS) for Hoag Memorial Hospital Presbyterian are available publicly at: <https://www.hoag.org/about-hoag/department-of-community-health/reports/>

## Community Served

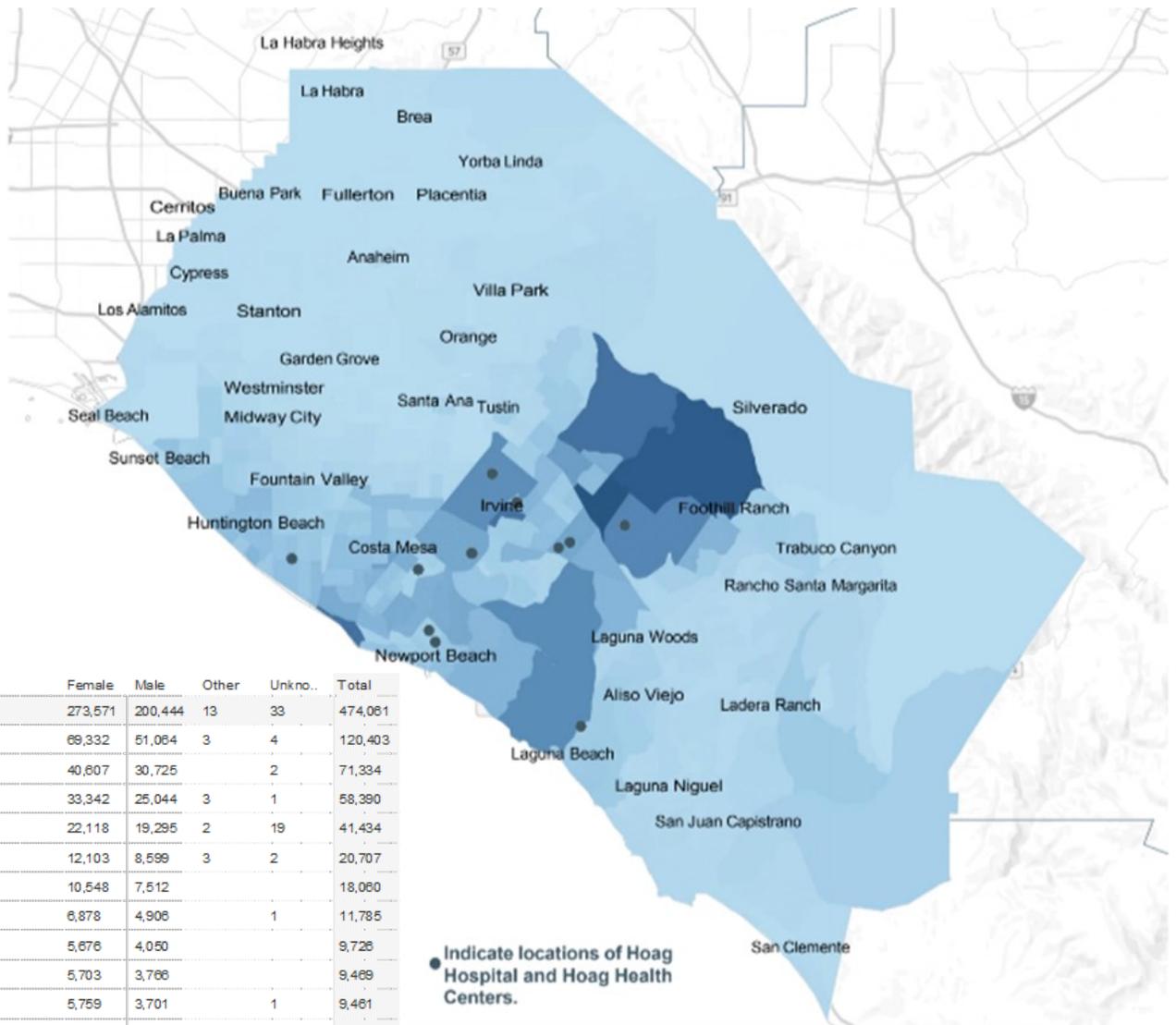
Hoag Hospital Newport Beach is located at 1 Hoag Drive, Newport Beach, CA 92663.

Hoag Hospital Irvine is located at 16200 Sand Canyon Avenue, Irvine, CA 92618.

Hoag Orthopedic Institute is located at 16250 Sand Canyon Avenue, Irvine, CA 92618.

Hoag defines the community served by a hospital as those individuals residing within its hospital service area. A hospital service area includes all residents in a defined geographic area surrounding the hospital and does not exclude low-income or underserved populations. Hoag Hospital Newport Beach, Hoag Hospital Irvine and Hoag Orthopedic Institute provide Orange County communities with access to a full spectrum of health care services through its more than 1700-member medical staff, state-of-the-art equipment and modern facilities. The hospitals' service area includes all 88 zip codes and all 582 census tracts in Orange County. Hoag's patient population comes from all 34 cities and unincorporated communities in Orange County.

## Patients Serviced by Hoag Memorial Hospital Presbyterian



	Female	Male	Other	Unkno..	Total
Total	273,571	200,444	13	33	474,061
Irvine	69,332	51,064	3	4	120,403
Huntington Beach	40,607	30,725		2	71,334
Costa Mesa	33,342	25,044	3	1	58,390
Newport Beach	22,118	19,295	2	19	41,434
Santa Ana	12,103	8,599	3	2	20,707
Tustin	10,548	7,512			18,060
Lake Forest	6,878	4,906		1	11,785
Fountain Valley	5,676	4,050			9,726
Aliso Viejo	5,703	3,766			9,469
Anaheim	5,759	3,701		1	9,461
Mission Viejo	5,397	3,718			9,115
Orange	5,258	3,352		1	8,611
Laguna Beach	3,812	3,254			7,066
Westminster	4,098	2,901			6,999
Laguna Niguel	3,883	2,584			6,467
Newport Coast	3,663	2,784		1	6,448
Corona Del Mar	3,602	2,673			6,275
Garden Grove	3,681	2,330			6,011
San Clemente	3,114	1,906		1	5,021
Trabuco Canyon	2,416	1,706	1		4,123
Laguna Woods	2,370	1,426			3,796
Ladera Ranch	2,459	1,331			3,790
Rancho Santa Margarita	2,208	1,414			3,622
Yorba Linda	1,580	1,025	1		2,586
Seal Beach	1,557	940			2,497
Laguna Hills	1,463	1,004			2,467
Fullerton	1,406	1,015			2,421
San Juan Capistrano	1,346	912			2,258
Dana Point	1,351	883			2,234

# Methodology

## Primary Data Collection

The study team designed four strategies for collecting community input: key stakeholder interviews with health experts and community service experts, provider surveys, community surveys, focus groups with residents, and focus groups with professionals who represent and/or serve the community or residents. Individuals representing high-need populations (low-income, minority, medically underserved, older adult, homeless/unhoused and youth) were included. To ensure consistency across every interview and focus group, the study team generated research protocols. The study team sought to build upon prior CHNAs by focusing the primary research on topics and subpopulations that are less well understood by statistical data.

## Key Stakeholder Interviews

To gain insight into the health needs of Hoag's service area, a series of interviews were conducted in May 2022. Drawing from a list of Hoag partner organizations that provide direct services to the Orange County community, invitations were sent to organizational leaders to participate in stakeholder interviews. Stakeholders were chosen to ensure that the organizations represented would cover a wide range of perspectives including public health. From those invitations, 18 interviews were conducted. Interview sessions were conducted and recorded via Zoom and transcribed using artificial intelligence software with human review. Transcriptions were uploaded into a qualitative analysis software where a deductive coding process took place.

## Provider Survey

The 2022 CHNA Provider Survey was developed by the study team and Hoag. The survey was conducted online and opened on June 8, 2022 and closed on July 7, 2022. The survey was available in English, Spanish, Korean, Vietnamese, Traditional & Simplified Chinese and emailed to a predetermined list of individuals and organizations. Providers represented a wide range of county, private, and non-private agencies who serve residents of Orange County. Each provider was given a link to the online survey, with a request to distribute the survey to coworkers, members of their field team, and any caretakers in their network. Individuals self-identified their organization in response to the survey. A total of 210 respondents were collected and used for analysis.

## **Community Member Survey**

The 2022 CHNA Community Member Survey was developed by the study team and Hoag. The survey was opened on June 24, 2022 and closed on August 8, 2022. The survey was translated into 10 languages: Arabic, Chinese (Traditional & Simplified), English, Khmer, Korean, Farsi, Spanish, Tagalog, and Vietnamese and administered through direct outreach at community events and canvassing as well as indirectly through email and social media. A total of 806 responses were collected and used in the analysis

## **Focus Groups**

The study team conducted nine focus groups in Orange County in August 2022 with 98 participants. Focus group participants were recruited from Hoag's partner organizations and by the consultant study team. Focus group sessions were conducted in person as well as remotely through Zoom. Participants were given \$30 gift cards to participate in the focus group (s) and transportation was also provided to ensure there were no barriers to participation. Each session lasted approximately 1 hour and was recorded and transcribed using in-language note taking. Three focus groups were conducted in Spanish, 1 in Chinese (Mandarin) and 1 in Farsi (Persian). Transcriptions were analyzed and coded into targeted themes.

## **Secondary Data Collection**

Within the guiding health framework for the CHNA, publicly available data was sought that would provide detailed information about the communities and people (at the city, ZIP Code and census tract levels) within the service area. In addition, comparison data were gathered to show how the service area communities are faring compared to the county or state. Indicators were chosen if they were widely accepted as valid and appropriate measures and would readily communicate the health needs of the service area. Preference was given to data that were obtained in the last 2 years and were available at the neighborhood or census tract level. Data sources were selected to understand general county level health, specific underserved and/or underrepresented populations, and to fill previously identified information gaps.

The study team analyzed over 200 quantitative health indicators to increase understanding of the health needs in Orange County and to assess priorities in the community. The study team collected data from existing sources such as the Social Progress Index Orange County, the US Census Bureau American Community Survey, County Health Rankings, California Department of Health Care Access and Information (HCAI), Orange County Health Care Agency, CDC, California Department of Education, American Cancer Society, and the National Institute on Aging.

In addition to the sources mentioned above, the study team collected quantitative and qualitative secondary data from multiple reports, including The Conditions of Children's Report 2021, Report on Aging in Orange County 2022, The Impact of Synthetic Opioids During the Pandemic 2022, California Children's Report Card 2022, and Equity in OC: Population Overviews.

## Priority Health Issues

The Community Benefit team utilized the following internal evaluation to consider these health needs and social predictors of health in light of the following additional criteria:

1. Community priority. Quantitative research data was used to ascertain the top priorities of the community, such as the high frequency with which the community prioritized the issue over others during the CHNA primary data collection process.
2. Community benefit expertise. Insights and experience are drawn upon as a major funder of community benefit programming (through grantmaking and learning from community benefit grantees).
3. Broad perspective. Hoag used the knowledge it gained from participation on various boards of directors and health-focused coalitions, which include stakeholders from diverse sectors.
4. Gaps in services. Hoag seeks to impact the well-being of the community at large beyond the traditional health services provided by our hospital. To this end, Hoag used its list of assets and resources to consider to what extent community supports were lacking in health and wellness services or programs.
5. Legacy priorities. For many years, Hoag has addressed health care access, behavioral health (social/emotional well-being), women's health and substance use, reflecting its belief in the importance and urgency of these needs and the need for ongoing investment to improve community health in these areas.

Hoag leadership reviewed the CHNA and identified community health needs that Hoag could have the highest impact and be most effective in. Based on the criteria described above, Hoag senior leadership identified and prioritized the following three health needs for 2023-2025:

1. Access to Health Care
2. Behavioral and Health
3. Cancer/Chronic Disease

# Implementation Strategy 2023 - 2025

The Implementation Strategy (IS) describes actions that Hoag intends to take, including programs and resources it plans to commit; anticipated impacts on these actions; and planned collaboration with other organizations.

## **Mental Health and Behavioral Health**

### *Strategies*

1. Provide mental health care services through Hoag's Mental Health Center primarily focused on the low-income population
2. Provide funding and/or in-kind support to community nonprofit organizations that focus on mental health that goes beyond our scope of care. This includes partnerships with local FQHCs and BE WELL OC.
3. Provide workforce development opportunities (internships, internal and external professional development) for the mental health profession.
4. Use existing pathways to expand our continuum of care for mental health.

### *Expected Outcomes for this health need*

- Increase access and remove barriers to mental health care services in community settings.
- Provide bilingual, bi-cultural mental health care services to people who otherwise could not obtain mental health services.
- Bridge gaps, improve referrals and increase coordination among mental health care providers and community resources and programs.
- Leverage Hoag assets to build capacity among community clinics and community organizations to improve access to mental health care.

## **Access to Health Care**

### *Strategies*

1. Provide financial assistance through free and discounted care for health care services, consistent with the hospital's financial assistance policy.
2. Offer information and enrollment assistance for no cost and low-cost insurance programs.
3. Provide funding and/or in-kind support to community clinics.
4. Provide funding and/or in-kind support to community nonprofit organizations that reduce barriers to accessing care.
5. Provide partners with space and resources at the Melinda Hoag Smith Center for Healthy Living.
6. Provide transportation support for seniors to increase access to health care services.
7. Collaborate with Share Our Selves to provide orthopedic care to the under-served (HOI)
8. Provide in-kind clinics to young athletes during fall sports (HOI)

### *Expected Outcomes for this health need*

- Increase access to primary health care and a medical home.
- Bridge gaps, improve referrals and increase coordination among health care providers and community resources and programs.
- Leverage Hoag assets to build capacity among community clinics and community organizations to improve access to health care.

### **Cancer/ Chronic Disease**

#### *Strategies*

1. Provide funding and/or in-kind support to community clinics.
2. Provide funding and/or in-kind support to community nonprofit organizations that focus on cancer/ chronic disease prevention and management.
3. Provide partners with space and resources at the Melinda Hoag Smith Center for Healthy Living.
4. Offer chronic disease prevention, management, education, care navigation, screenings and support groups.
5. Continue to provide wellness and prevention programs to vulnerable communities.

### *Expected Outcomes for this health need*

- Improve individuals' compliance with chronic disease prevention and management recommendations.
- Increase community awareness of disease prevention strategies.
- Leverage Hoag assets to build capacity among community clinics and community organizations to improve chronic disease management among at-risk populations.
- Provide access to needed health promotion resources for vulnerable populations at-risk for or suffering with chronic diseases.
- Continue health education and health coaching efforts – e.g. public school presentations, community lectures, on-line education.
- Continue physician and healthcare provider education.

### **Public Comment**

In compliance with IRS regulations 501(r) for charitable hospitals, a hospital Community Health Needs Assessment (CHNA) and Implementation Strategy (IS) are to be made widely available to the public and public comment to be solicited. In compliance with these regulations, the CHNA and IS are available to the public on the website <https://www.hoag.org/about-hoag/department-of-community-health/reports/>

# Chapter III: Department of Community Health Programs

## Mental Health Center

The Mental Health Center (MHC) was created to serve those who have barriers in accessing mental health services. The majority of the clients are low-income, uninsured or underinsured, and highly vulnerable. In its 25th year, the Mental Health Center’s goal is to contribute to the improved health and well-being of the surrounding underserved community, through the provision of psychotherapy and integrated care.

The MHC provides evidence based psychotherapy services to individuals and families who otherwise could not obtain mental health services, at no cost to participants. Psychotherapy is a change process in which people are helped to express themselves, identify and clarify their problems, learn more helpful coping skills, and achieve goals that are important to them. These services are intended to increase an individual’s level of happiness, satisfaction, and functioning in life.

The MHC is a full-service program, offering individual, couple, family, and group psychotherapy for children and adults. MHC staff are bilingual and bicultural, providing culturally competent services in English, Spanish, and Farsi. Psychiatry services are also available for established clients, as needed. Research shows that psychotropic medications, in addition to psychotherapy, are the most effective treatment for most psychiatric conditions. If medication is indicated, clients are educated on the nature of their illness and the MHC psychiatrist will explain the risks and benefits of medication. Clients are connected to case management to ensure access to prescribed medication and provide ongoing support. Additionally, clients may be referred to yoga therapy to complement treatment plan goals.

Clients present with a mild to moderate level of distress/symptomatology. MHC therapists are specialized in treating:

- Depression
- Grief and loss
- Anxiety
- Trauma and abuse
- Self-esteem issues
- Poor family functioning
- Issues related to high stress levels
- Illness
- Parenting
- Relationship issues
- Perinatal mental health
- Play therapy



4,313

Mental Health  
Therapy  
Sessions



2,645

Participants in Mental  
Health Community  
Workshops and  
Groups

### Support

The Mental Health Center offers a number of multi-week psychotherapeutic and psycho educational groups and workshops. The groups range across the spectrum from children to older adults, focusing on different health and wellness topics.

## Community Partnerships

The MHC has fostered a close, collaborative and direct referral network with neighboring school districts. Additionally, the team provides community presentations on varying mental health topics at school districts and colleges in Orange County:

- Newport Mesa Unified
- Tustin Unified
- Santa Ana Unified
- Orange Unified
- Huntington Beach Union High
- Orange County Department of Education
- Laguna Beach School District
- Capistrano Unified
- University of California, Irvine
- Goldenwest College

Additionally, the MHC provides psychotherapeutic and psycho educational groups and workshops for nonprofit partner agency clients. This collaborative effort allows for the nonprofit partner agencies to offer mental health services through Hoag's MHC clinicians. Some of the groups include:

- Depression Support Groups
- Self-Esteem Groups
- Stress Management Workshops
- Anxiety Management
- Vicarious Trauma and Compassion Fatigue
- Healing Men and Trauma
- Mental Health 101
- Coping Skills
- Grief
- Generational Trauma

Hoag's Mental Health Center staff also serve as members of various county-wide and school district collaboratives. These include:

- Newport Mesa Unified School District (NMUSD) Mental Health Task Force
- Newport Mesa Unified School District (NMUSD) Community Collaborative and School Attendance Review Board
- Santa Ana Unified School District Community Collaborative
- Orange County Families and Communities Together (FaCT) Leadership Council

## Professional Development

The Mental Health Center provides professional development trainings with continuing education credits to mental health professionals at no cost. In 2023, the MHC provided professional training and workforce development to 909 nonprofit partners and professionals. Some of the trainings include:

- ASIST for suicide assessment and intervention
- Law and Ethics
- Self-Compassion
- ACES Interface
- Mental Health First Aid classes
- Mental Health and Nutrition
- EMDR
- Grief and Trauma



909

Provided professional  
development training to  
nonprofit partners

## Education

The MHC is an Intern Training center that works in partnership with many universities at the Master's and Bachelor's levels, such as:

- University of Southern California
- California State University, Dominguez Hills
- California State University, Fullerton
- California State University Los Angeles
- California State University, Long Beach
- Azusa Pacific University
- Columbia
- University of California, Los Angeles

In 2023, the MHC provided supervised clinical internship training for 16 Master of Social Work (MSW) students and 2 Bachelor of Science in Human Services (BS) students.

**Contact: Rocio Valencia-Vega, LCSW at 949 764-8547 or [rocio.valenciavega@hoag.org](mailto:rocio.valenciavega@hoag.org)**

# Melinda Hoag Smith Center for Healthy Living

## **Mission**

To promote the health and wellbeing of the underserved community by delivering integrative programming and engaging collaborative partnerships.

## **Vision**

Empower the underserved community to attain the highest level of health and wellbeing.

## **Guiding Principles**

Access to the highest level of care

Prevention of chronic conditions through intervention, education and advancement of health equity

Provide culturally sensitive services and resources that address social and health needs

Offer integrative approach to care that meet the needs of the whole person

Build capacity within our nonprofit partner organizations

The Melinda Hoag Smith Center for Healthy Living (MHSCHL) is a one-stop-shop for health and social services. Through a transformational gift from the George Hoag Family Foundation, the MHSCHL has served as a recognized community resource for the vulnerable populations and a collaborative partner for nonprofit agencies.

Through co-location with like-minded organizations and nonprofit agencies under one roof, the Center provides free health and wellness classes, workshops and supportive services to the community.

Hoag provides nonprofit partners with physical space and resources in the Melinda Hoag Smith Center for Healthy Living. Families and clients receive a full range of health and social service resources. These services help connect individuals with the resources to help improve and impact their health. There are currently over 25 nonprofit partner agencies collaborating and providing services at the MHSCHL.

The MHSCHL allows providers to take an integrated, holistic approach to community services addressing everything from health care to legal services, to mental health and social support. The Center has served as a collaborative model of impactful and effective community service focused on the vulnerable and under resourced communities.

The MHSCHL facilitates the hospital's delivery and provision of community benefit, to help address health inequities and directly serve the community. It was created for the community, and has grown in programming to reflect their continuously growing and changing needs.

## Case Management

The Center's offers short-term case management services to individuals and families residing in Orange County. The case management team use a biopsychosocial approach to assess and identify any unmet needs. Clients and families are provided the tools to navigate complex health and social service needs through resource brokering. The MHSCHL team of case managers provide wraparound case management services, as well as additional community presentations and outreach at events to highlight and share the resources and services at the Center.

### Other programs include:

- Bi-monthly food distribution of fresh produce and groceries in partnership with Second Harvest Food Bank
- Monthly diaper and pull-up distribution in partnership with Community Action Partnership of Orange County
- Emergency housing assistance in partnership with Families Forward and Share Ourselves
- Health and wellness classes for adults and children in English and Spanish that include Zumba, Yoga, Pilates, Balance and Stretching, Body Conditioning, Ballet, and Drumming for Stress Reduction
- Health education workshops that include Prevention of Obesity and Diabetes through Education and Resources (PODER) in partnership with CHOC

### A few highlights from 2023:



7,630

Individuals  
Received Food  
Assistance



\$107,560

Emergency  
Housing Assistance



5,027

Individuals Assisted with  
Crisis Case Management  
and Resource Brokering



9,249

Participation in  
Integrated Health  
Services



192,450

Diapers  
Distributed

## **Integrative Health Classes**

The Melinda Hoag Smith Center for Healthy Living offers free health and wellness classes for the community. The health-related benefits from regularly accessing wellness classes range from improved healthy behaviors such as increased exercise and physical activity, or helping to manage and alleviate stress. Healthy habits and behaviors can help prevent or mitigate the effects of various chronic diseases, as well as help improve mental health, and increase social engagement and a sense of community.

However, access to wellness classes is often reserved for individuals who can afford them. For our lower-income community, wellness classes are cost-prohibitive, and often the lowest priority for families juggling a host of complex health issues or economic instability.

Through philanthropic support, the MHSCHL is able to provide a wide array of wellness classes, to help provide a means to reduce health inequities and disparities within the vulnerable communities. Classes range from physical fitness classes such as yoga, pilates, Zumba, to children-focused classes such as ballet, zumbini—a mommy-me dance class, and hip hop. Other more specialized classes are offered such as drumming for mental health, and balance and stretching.

## **Professional Network Resource Exchange**

The Professional Network Resource Exchange (PNRE) is a monthly meeting facilitated that provides nonprofit agencies opportunities to meet, network, and update one another about services and programs. PNRE offers a space for like-minded individuals to come together and build a sense of community, from a provider perspective. The network helps to empower professionals as it offers the opportunity for an immediate exchange of resources and cross-referrals with key players in the field. It's a collaborative endeavor between Hoag and various nonprofits in Orange County focusing on whole person care, increasing access to services, and elevating the community.

Additionally, PNRE serves as a learning hub. Each meeting hosts a forum for speakers to share information on current trends and issues affecting the community. Some of the forum topics can include an financial literacy, food insecurity, and increasing access to services for Medi-Cal eligible Orange County residents.

## Community Based Partners

The MHSCHL’s partner network serves to meet and address the social determinants of health and provide complementary services and resources in partnership with Hoag. In 2023, our nonprofit partner organizations included:

### MHSCHL Nonprofit Partner Organizations

 <p><b>Cancer Kinship</b> provide mentorship, education and support for cancer patients</p>	 <p><b>Council on Aging</b> provide Balance and Stretching wellness classes</p>	 <p><b>Project Youth, OC Bar Foundation</b> provide youth diversion programs</p>
 <p><b>Children’s Bureau</b> provide general case management and resource brokering</p>	 <p><b>Girls Inc.</b> provide after school programming for boys and girls, that focus on STEM classes</p>	 <p><b>Project Self-Sufficiency</b> provide support and resource links for single parents enrolled in college</p>
 <p><b>CHOC PODER</b> provide health and education on Obesity and Diabetes</p>	 <p><b>Human Options</b> provide domestic violence prevention and intervention services.</p>	 <p><b>Public Law Center</b> provide family law services and counseling</p>
 <p><b>Community for Innovation, Entrepreneurship, Leadership &amp; Opportunities</b> provide entrepreneurship and small business development</p>	 <p><b>Huntington Beach Adult School</b> provide ESL classes</p>	 <p><b>The Purpose of Recovery</b> provide peer and family recovery support</p>
 <p><b>Clinic in the Park</b> provide free safety equipment for families</p>	 <p><b>MOMS OC</b> provide newborn and pregnancy education and wellness classes for parent and baby</p>	 <p><b>Second Harvest Food Bank</b> provide food for distribution</p>
 <p><b>Community Action Partnership of OC (CAPOC)</b> provide diapers for distribution</p>	 <p><b>Newport Mesa Family Resource Center</b> provide social and supportive services for children and families.</p>	 <p><b>SOS Children &amp; Family Health Center</b> provides full scope primary care.</p>
 <p><b>CHIOC</b> provide enrollment assistance in social service programs</p>	 <p><b>NAMI</b> provide support groups and classes</p>	 <p><b>SOS Dr. Robert &amp; Dorothy Beauchamp Child &amp; Family Dental Center</b> provides general and specialty dental services for infants to adults.</p>
	 <p><b>Olive Crest</b> provide parenting classes.</p>	 <p><b>United Way Orange County’s</b> free tax prep assistance and SparkPoint financial literacy program</p>

# Promotores Program

Promotores is the Spanish term for “community health workers”. Promotores are trusted individuals who empower others and support health education and prevention efforts in order to reduce health disparities. They use their insight and knowledge of cultural norms to serve as a two-way bridge to resources and programs—advocating and bringing resources to the community, building individual and community capacity.

Hoag’s Promotores Program has successfully integrated into the communities they outreach to, serving as a link between low-income families and the services that exist to help them. Although many programs exist to help low-income families access health care, mental health services, translation, legal services and more, the individuals and families who may need them most, often don’t know about them or know how to access those services.

One of the key skills of a promotor is to build and maintain relationships of mutual trust and respect within their communities in order to reach out to withdrawn and underserved populations. The neighborhood connection the Promotores have with the communities they serve help increase their likability, trustworthiness, and effectiveness of their outreach. The team uses various tools to bring the Melinda Hoag Smith Center for Healthy Living’s resources and services out to the community.

- Door-to-door outreach
- Case management
- Resource brokering
- Tabling at community events, such as churches, soccer games, school campuses, laundromats
- Peer led support groups and health education
- Enrollment and benefit application assistance
- Home visitation
- Patient advocacy
- Health Literacy
- Accompaniment to health related appointments.

Hoag’s Promotores team is stationed at two sites: the Melinda Hoag Smith Center for Healthy Living focusing on the Costa Mesa area, and the Oak View Family Resource Center focusing on the Huntington Beach area.

## Health Education

Hoag’s Promotores Team have been trained through the American Foundation for Suicide Prevention to present Talk Saves Lives, in English and Spanish. The community presentation serves as an introduction to suicide prevention that covers the general scope of suicide, research, prevention and the protective factors that lower risk. Participants will learn the common risk factors for suicide, how to spot the warning signs in others, and how to keep the community safe. The presentation is designed to help educate and provide tools for non-clinical staff, volunteers, and caregivers.

## Cafecitos

Cafecitos is an ongoing workshop that aims to help inform the community of the different resources, as well as help address other community needs. Past Cafecito topics have included:

- Methamphetamine Overdose and program recovery assistance, in partnership with The Purpose of Recovery
- Immigration information and services, in partnership with The Coalition for Human Immigrant Rights, CHIRLA
- Mental Health and Gratitude workshops

## Support

The Promotores serve as a social support and resource. The support groups can focused on different activities; however, they all serve to build a sense of community within the group. Some examples of past groups include:

- Mi Espacio: women's group for Spanish speakers
- Mujeres Fenomenales: 50+ women's group for Spanish speakers

## Outreach

One of the key roles of the Promotores team is outreach in the community, through both door-to-door outreach or participating at different community events and hosting a table or booth. Both types of outreach allow for the Promotores Team to meet the community where they are at. Outreach also allows for one-on-one interactions with the community, which offers the team an opportunity to connect with and listen to individual's needs. Outreach has provided the means to strategically plan and coordinate the appropriate programming and events at the MHSCHL or Oak View Family Resource Center to best serve the community.

In 2023, the Promotores conducted 7,158 outreach contacts in Costa Mesa. Some of the outreach events in 2023 included:

- Church events: St. Joachim Health Fair
- School events: District English Learner Advisory Committee (DELAC), Open Houses
- Nonprofit agency events: ABRAZAR's Spring of Hope, Crime Survivor's Super Hero Run Walk
- Cinco de Mayo Event, in partnership with Oak View Elementary
- Halloween, Oak View's Trunk or Treat Event
- Huntington Beach Adult School Job Resource Fair



7,158

Door-to-Door Promotores  
Outreach Contacts in Cos-  
ta Mesa

Contact: Stephanie Cariker, LCSW at 949 764-6571 or [stephanie.cariker@hoag.org](mailto:stephanie.cariker@hoag.org)

# Community Nurse Navigation Program

Community Nurse Navigators (CNN) focus on prevention and management of chronic diseases in the underinsured and uninsured community. The team of nurses help individuals and families navigate health systems to focus on whole-person care through:

- Clinical Support
- Individual care coordination
- Resource brokering, and linkage
- Patient advocacy
- Health Literacy
- Chronic disease prevention and management

Additionally, the CNN nurses serve as a compassionate guide, providing health coaching and support through each step of the care continuum. Community nurse navigators provide bicultural and bilingual one-on-one health related case management, and facilitate health and wellness workshops and programming at the Melinda Hoag Smith Center for Healthy Living, as well as various community and senior centers.

## Health and Wellness Coaching

The CNN Program includes individual health and wellness coaching that focuses on serving underinsured and uninsured individuals to help evaluate and address different aspects of their lifestyles. Health coaching is designed for individuals living with one or more chronic conditions, and are seeking an improved health status.



422

Individuals Served  
by Community  
Nurse Navigators



1,347

Participants in  
Health Education  
Workshops

## Health Education

The CNN Team conducts wide range of health education class series with topics that range from chronic disease management and prevention, to other specific broader health topics specific to the needs of the community. Some of the health education topics from 2023 include:

- Cardiac Health
- Stroke Prevention
- Diabetes
- Alzheimer's & Dementia
- Mental Health
- Gastrointestinal Issues
- Immunizations
- Women's Health
- Men' Health
- Nutrition
- Fall Risk

## Support

The Community Nurse Navigators also offer health support groups that can range from general health to focuses on managing chronic diseases and provide social support for one another.

Contact: Minzah Malik, MBA, MPH at 949 764-6597 or [minzah.malik@hoag.org](mailto:minzah.malik@hoag.org)

# Project Wipeout

Hoag’s Project Wipeout program was created to provide beach and water safety information to the nearby beach communities after seeing an increased incidence of spinal cord injuries in the Hoag Emergency Department. The program’s mission has evolved to inspire water safety culture at the beach and beyond through education and community outreach, as well as through partnership with local lifeguard agencies throughout Orange County. Education efforts have focused on general beach and water safety and overall injury prevention, such as:

- Drowning Prevention
- Beach Hazards
- Rip Current Safety and Escape
- Best Practices in the Water
- Sun Protection

## Annual Lifeguard Education Conference

Project Wipeout hosts an annual education symposium for local lifeguards. The conference is a continuing education and training opportunity for lifeguards to learn from Emergency Department physicians, nurses, and other health and life-saving experts on a variety of topics related to professional ocean lifeguards. In 2023, the Lifeguard Conference returned to an in-person event, with over 200 seasonal and full-time lifeguards in attendance.

## Training Opportunities

Project Wipeout coordinate with the Orange County lifeguard agencies to facilitate trainings on various topics that are often integrated into lifeguard training modules. The trainings are coordinated after lifeguard agencies share a gap in current training offerings, often indicating a need for trainings in social and mental-health related topics. In 2023, Project Wipeout partnered with Surfline to provide a forecast training at the MHSCHL on the effects of El Nino on the beaches.



2023 Lifeguard Education Conference at Huntington Beach Senior Center

## **Collaborations**

Project Wipeout partners and collaborates with members of the beach safety community, which includes lifeguard and fire departments throughout Orange County, the California Surf Life Saving Association (CSLSA), and other lifesaving agencies.

Additionally, Project Wipeout works closely with the Orange County Lifeguard Chief's Association, the Orange County Drowning Prevention Taskforce, the California Water Safety Coalition, and other county-wide and southern California collaborative entities.

## **Project Wipeout Advisory Committee**

Project Wipeout coordinates a collaborative of Orange County lifeguard agencies, the Project Wipeout Advisory Committee (PWAC). The mission of the Project Wipeout Advisory Committee is to aid Hoag's Community Benefit Program in implementing Project Wipeout programming, with the representatives from each agency serving as consultants on strategies, programmatic activities, and technical education content. The PWAC meets at the MHSCHL for strategic program planning. The PWAC is comprised of the following marine safety, lifeguard agencies:

- City of Seal Beach
- City of Newport Beach
- Lake Mission Viejo
- City of Huntington Beach
- City of Laguna Beach
- OC Lifeguards
- Huntington State Beach
- Crystal Cove State Park
- City of San Clemente

## **Eyes Save Lives at the City of Costa Mesa**

In collaboration with Hoag Irvine's Emergency Department Nurses, Project Wipeout developed a short water safety presentation for parents and caregivers. The scripted presentation can be delivered by a nurse, lifeguard, or volunteer to help educate on water safety. The presentation has been integrated into the City of Costa Mesa's parent safety trainings. It is available in English and Spanish.

## **Education and Outreach**

The PWAC engaged in a collaborative process to develop a standardized beach safety presentation for use in local schools. Each lifeguard agency interact with school-based groups or requests for beach safety presentations in the spring. Project Wipeout frequently attends community events to help provide beach and pool safety education.

**Contact: Lauren Tabios, MBA, MPH at 949 764-5321 or [lauren.tabios@hoag.org](mailto:lauren.tabios@hoag.org)**

# Appendix A

## Hoag Hospital Charity and Discount Policy

Status **Active** PolicyStat ID **15846575**



Origination 1/15/2020  
Last 5/20/2024  
Approved  
Effective 5/20/2024  
Next Review 5/20/2027

Owner Kathleen  
Graham: EXEC  
DIR REVENUE  
CYCLE  
Area (Category) Revenue Cycle  
Applicability Hoag Memorial  
Hospital  
Presbyterian &  
Hoag Clinic

### Financial Assistance Program Policy (FAP)

#### PURPOSE:

The purpose of this policy is to ensure a fair, non-discriminatory, effective, and uniform method for the provision of financial assistance to eligible individuals who are unable to pay in full or part for medically necessary medical care. This policy describes the Hoag Financial Assistance Program (FAP), and outlines Hoag's operational guidelines in relation to the availability of and eligibility for financial assistance, including charity care and discounted payment, for patients who demonstrate financial need as explained below.

#### SCOPE:

This policy covers Hoag's inpatient and outpatient departments.

#### AUTHORIZED PERSONNEL:

Financial Assistance Specialist, Business Office Manager, Self-Pay Manager, Supervisor Self-Pay/Charity, Self-Pay Collectors, Financial Councilors, PAS Supervisors, Insured and Uninsured Patients

#### 1. POLICY:

- A. Hoag seeks to address patient's health care and financial needs while remaining committed to the stewardship of Hoag resources. To ensure that Hoag obtains appropriate reimbursement for services provided, several payment options and programs are available to support the needs of uninsured and underinsured patients who demonstrate financial need.

- B. Hoag's Financial Assistance Program is widely publicized, including on the Hoag website, in postings throughout the Hospital and outpatient departments, and through notices and information given to patients at time of treatment, following discharge, or upon patient request.
- C. Patient billing processes shall remain in compliance with applicable laws and regulations, and Hoag policies relevant to patient financial assistance:
  - I. All Hoag patients receive information about Hoag's Financial Assistance Program at the time care is provided, at discharge, and/or when services are billed.
  - II. All Hoag patients may apply for financial assistance, with eligibility for assistance based on demonstrated financial need.
  - III. Access to necessary care shall in no way be affected by whether financial assistance eligibility exists; medically necessary care will always be provided to the extent Hoag can reasonably do so.
  - IV. The need for financial assistance is a sensitive and deeply personal issue for patients. All Hoag employees will maintain confidentiality of requests for financial assistance, the information obtained in the application process, and the approval or denial of financial assistance.
  - V. In an effort to ensure patients' post-acute and follow-up health care needs are met, patients who lack third-party insurance coverage are offered information about applying for coverage through Medicare, Medicaid, Medi-Cal, the Healthy Families Program (CA), coverage offered through the Covered California (CA), or other state or county funded health coverage programs. Hoag will assist patients with applying for government-sponsored programs and follow through to acceptance or denial.

## **2. LIST OF PROFESSIONALS SUBJECT TO HOAG'S FAP:**

- A. Emergency Medicine physicians who provide services to patients in the Hoag Emergency Department at either Hoag Hospital campus, are required by law to provide discounts to uninsured patients and patients with High Medical Costs who are at or below 400% of the federal poverty level. In addition, Hoag maintains a list of physicians, medical groups, and other health care providers who provide services to Hoag patients, indicating those who offer discounted care through the Hoag Financial Assistance Program. Hoag will provide this list to any patient who requests a copy. The provider list can also be found online on Hoag's website: [www.hoag.org](http://www.hoag.org).

## **3. BILLING PROCESS AND DETERMINING ELIGIBILITY TO FINANCIAL ASSISTANCE:**

- A. It is the expectation that the patient's estimated cost or liability will be collected in full prior to or at the time of service. If a patient has insurance coverage for the service, their co-pay or other payment responsibility will be requested at time of service and insurance will be billed. If a patient states they have no insurance coverage and cannot pay in full at time of service, payment options and programs will be offered and will be consistent with the sequential order as outlined below:
  - I. Full payment will be requested.

- II. Hoag will offer a reasonable payment plan based on the estimated cost for care, and a deposit payment will be requested, if Hoag and the patient agree on a reasonable payment plan.
- III. Hoag will assist patients in determining eligibility for government-funded programs including, but not limited to:
  - a. Medicare
  - b. Medi-Cal (CA)
  - c. Covered California
  - d. Other state and county funded health coverage programs.
- IV. When a payment solution cannot be found in Stages I - III above, then the patient's options for charity care or discounted payment should be considered. Pending applications for government-funded health program will not preclude the patient's eligibility for charity care or discounted care.  
**Important:** If at any time, a patient requests information, or an application for Hoag financial assistance, it is promptly provided to the patient.

#### 4. FINANCIAL ASSISTANCE PROGRAM OVERVIEW:

- A. The Financial Assistance Program at Hoag ensures that medically necessary health care is provided at discounted or no cost to uninsured and underinsured patients who meet financial eligibility requirements. Any uninsured or underinsured patient who is unable to pay for their Hoag bill and whose income meets the Federal Poverty Level (FPL) guidelines set forth below will be considered eligible for assistance through the Hoag Financial Assistance Program in accordance with those guidelines. Additionally, patients who incur qualified High Medical Costs may be deemed eligible for financial assistance.
- B. Hoag aspires to provide health care services in the communities it serves with the utmost dignity and compassion for each patient and family in its care. In a confidential and caring environment, patients are provided financial assistance to pay their Hoag bills, which ensures access to necessary health care services. This support is seen as an essential element in fulfilling their human dignity and enabling them to live more healed, more whole, and more capable of contributing to the common good.

#### 5. COMPLETION OF THE FAP APPLICATION:

- A. Upon a patient's request, a Financial Assistance Program (FAP) application will be provided. Designated personnel will assist patients in completing the Financial Assistance application and determining eligibility for charity care, discounted payment, or government-funded programs, if applicable. Financial Assistance notices printed in English and Spanish are also placed in the public admission areas at Hoag. Interpretation services are available to address any questions or concerns and to assist in the completion of the Financial Assistance application.
- B. A patient, or patient representative, who requests a discount, charity care, or other assistance in meeting their financial obligation to Hoag shall make every reasonable effort to provide Hoag with documentation of income and health benefits coverage. If the person requests

charity care or a discount and fails to provide information that is reasonable and necessary for Hoag to make a determination, Hoag may consider that failure in making its determination.

- C. Upon establishing full or partial eligibility under the Financial Assistance Program, the terms of assistance established will be valid for six (6) months from the date of the eligibility letter. Additionally, other pre-existing patient account outstanding balances at the time of eligibility determination will be included as eligible, excluding exceptions set forth in this policy. After six (6) months, a patient will need to reapply for consideration under the Financial Assistance Program. Discounts under the Financial Assistance Program will only apply to hospital services for which financial assistance was requested and approved, and other hospital services provided within six (6) months following such approval.
- D. Hoag financial systems will be updated to reflect the charity care or discounted amount using the designated adjustment code for the full or partial approved amount.

## 6. PATIENT BILLING:

- A. Statements mailed to the patient will include a clear and concise notice advising the patient of the Hoag Financial Assistance Program and the appropriate contact information.
  - I. This notice shall also:
    - a. Advise the patient that they may be eligible for programs such as Medicare, Medi-Cal (CA), Covered California or other state or county funded health coverage programs.
    - b. Offer assistance to the patient to apply for any of these programs and that Hoag will provide the patient with an application.
- B. Patients in the process of qualifying for government financial assistance or the Financial Assistance Program will not be assigned to collections prior to 180 days from the date of initial post-discharge/treatment billing.
- C. If a patient is attempting to qualify for eligibility under the Financial Assistance Program and is attempting in good faith to settle an outstanding bill with Hoag by negotiating an extended payment plan or by making regular partial payments of a reasonable amount, Hoag shall not send the unpaid bill to any collection agency or other assignee, unless that entity has agreed to comply with guidelines outlined in California Health and Safety Code Section 127400 et seq.
- D. Insured or uninsured patients, who at the sole discretion of Hoag are reasonably cooperating to settle an outstanding hospital bill by making regular and reasonable payments towards their outstanding hospital bill, will not be sent to an outside collection agency if doing so would negatively impact the patient's credit.
- E. Any extended payment plan may be declared no longer operative after 90 consecutive days without payment. Before declaring the extended payment plan no longer operative, Hoag shall make a reasonable attempt to contact the patient by telephone and to give notice in writing that the extended payment plan may become inoperative, and of the opportunity to renegotiate the extended payment plan. Prior to the extended payment plan being declared inoperative, Hoag shall attempt to renegotiate the terms of the defaulted extended payment plan, if requested by the patient. Hoag shall not report adverse information to a consumer credit reporting agency or commence a civil action against the patient or responsible party for nonpayment at any time within 180 days after the initial post-discharge billing or prior to the

time the extended payment plan is declared to be no longer operative.

- F. Patients who communicate that they have an appeal for coverage of services pending will not be forwarded to collections until the final determination of that appeal is made.

## 7. APPLYING FOR FINANCIAL ASSISTANCE

- A. Patients may apply for financial assistance by submitting a completed Financial Assistance Program Application. Financial Assistance Program applications are available by visiting Hoag.org, emailing [PFS@hoag.org](mailto:PFS@hoag.org) or by connecting with Patient Financial Services at 949-764-8400.
  - I. The Financial Assistance Program application form may be submitted prior to service, during a patient stay, or after services are completed and the patient has been discharged.
  - II. In general, a Financial Assistance Program application will not be accepted if submitted more than 240 days after the initial post-discharge billing, except as otherwise provided by 26 C.F.R. § 1.501(r)6(c).
  - III. Hoag will provide assistance with completion of an application for the Financial Assistance Program as needed and will also provide guidance and/or direct assistance to patients as necessary to facilitate completion of government low-income program applications when the patient may be eligible.
  - IV. In the case of patients who have submitted an incomplete application Hoag will:
    - a. Notify the patient in writing that their Financial Assistance Program application is incomplete, including the list of outstanding items and information;
    - b. Offer assistance with the completion of the application; and
    - c. After such assistance is provided, allow the patient thirty (30) days to complete and resubmit the application with the additional information and items required and resubmit it.
- B. As part of the Financial Assistance Program application, the patient must provide copies of the following:
  - I. Two(2) recent pay stubs for each wage earner(2) pay stubs.
  - II. Two (2) most recent 1040 tax returns, including all applicable schedules and attachments.
  - III. Two (2) most recent bank statements (checking/savings). Including all pages.
  - IV. Copy of your most recent canceled rent check, lease agreement or mortgage payment.
  - V. Written statement from a family member or friend who is providing your room and board and/or income, if applicable.
  - VI. If uninsured, eligibility for government-funded programs must be explored. Programs include, but are not limited to: Medicare, MediCal (CA), Covered California, and other state and country funded health coverage programs.

- VII. In cases where documentation is unavailable, the patient's income may be verified by having the patient sign the Financial Assistance application attesting that the income information provided is accurate, if other submitted proof of income cannot be verified or is incomplete.
  - VIII. Patients applying for discounted payment only are required to provide I and II (i.e. pay stubs and tax returns). They may provide additional information to demonstrate financial eligibility.
- C. Hoag relies on the fact that information presented by the patient is complete and accurate. Provision of financial assistance does not eliminate the right to bill, either retrospectively or at the time of service, for all services when fraudulent, inaccurate or incomplete information has been given. In addition, Hoag reserves the right to seek all remedies, including but not limited to civil and criminal damages from those who have provided false, inaccurate or incomplete information in order to qualify for the Financial Assistance Program.

**8. INCOME QUALIFICATIONS:**

- A. Any uninsured or underinsured patient whose family income is less than 400% of the current federal poverty level (FPL) and is unable to pay for medical care received at Hoag shall be considered eligible for financial assistance. Full or partial assistance is based on the criteria outlined below:

<b>If the income % of FPL is:</b>	<b>And the Patient is:</b>	<b>Then:</b>				
200% or Less	Uninsured or Insured	Full Financial Assistance, entire (100%) patient liability portion of the bill for services, will be written off.				
201% - 400%	Uninsured	Partial Financial Assistance, the patient payment obligation will be a 50% of the gross amount the Medicare program would have paid for the services.				
201% - 400%	Insured	<p>The patient obligation will be reduced by the insurance payments:</p> <table border="1"> <tr> <td>If the amount paid by the insurance exceeds what Medicare would have paid:</td> <td>Then Full Financial Assistance, the entire (100%) patient liability portion of the bill for services, will be written off.</td> </tr> <tr> <td>If the Medicare payment LIKE rate is greater than the HMO/PPO rate for services rendered:</td> <td>Then the patient payment obligation will be based on the HMO/PPO payment rate.(deductible, copay, coinsurance, etc.)</td> </tr> </table>	If the amount paid by the insurance exceeds what Medicare would have paid:	Then Full Financial Assistance, the entire (100%) patient liability portion of the bill for services, will be written off.	If the Medicare payment LIKE rate is greater than the HMO/PPO rate for services rendered:	Then the patient payment obligation will be based on the HMO/PPO payment rate.(deductible, copay, coinsurance, etc.)
If the amount paid by the insurance exceeds what Medicare would have paid:	Then Full Financial Assistance, the entire (100%) patient liability portion of the bill for services, will be written off.					
If the Medicare payment LIKE rate is greater than the HMO/PPO rate for services rendered:	Then the patient payment obligation will be based on the HMO/PPO payment rate.(deductible, copay, coinsurance, etc.)					

			Then there is no discount.
201% - 400%	Insured yet services are NOT covered by the payer	The following will apply: If the patient ordinarily would be responsible for the full billed charges:	Then Partial Financial Assistance, the total patient payment obligation will be based on the HMO/PPO payment rate had the service been covered.

**AUTOMATIC CLASSIFICATION FOR CHARITY CARE:**

- B. Under the following special circumstances, patient may be deemed eligible for charity care without absolute requirement for submission of a financial assistance application:

<b>Circumstance</b>	<b>California</b>
Eligible for other FPL-qualified programs	(Addressed in Other Special Circumstances section below)
Disabled	n/a
Deceased	Is deceased and without third-party insurance coverage or identifiable estate, no living spouse
Incarcerated	n/a
Homeless	Is determined to be homeless and is not currently enrolled in Medicare, Medicaid or any government sponsored program, without third-party insurance coverage
Seen in ER, unable to bill	Is treated in the Emergency Department but Hoag is unable to issues a billing statement
Access to Care	Is treated through an Access to Care Program

**9. OTHER SPECIAL CIRCUMSTANCES:**

- A. Patients who are in bankruptcy proceedings may have their debt discharged by the court. Hoag staff can validate this status by obtaining from the patient a legal document showing discharge for accounts not yet in collection. Hoag’s external collection agency may also determine that a patient’s debt has been discharged through bankruptcy.
- B. Patients who are eligible for FPL - qualifying programs such as Medi-Cal, Medicaid, and other government-sponsored low-income assistance programs, are deemed to be indigent. Therefore, such patients are eligible for Charity Care when payment for services is not made by the FPL-qualifying program. Patient account balances resulting from non-reimbursed charges are eligible for charity care write off. Medi-Cal Share of Cost obligations are not eligible for charity write off or the discount program.
- C. Specifically included, but not limited to, are eligible charges related to the following:
- I. Denied inpatient stays for medically necessary services.
  - II. Denied inpatient days of care; charges related to days exceeding a length of stay

- limit.
- III. Eligible non-covered services.
- IV. Denied IP Treatment Authorization Request (TAR).
- V. Denials due to restricted coverage, including Medi-Cal Restricted Aid Codes (i.e., Patients that may only have pregnancy or emergency benefits, but receive other hospital care).
- VI. Out-of-State Medicaid claims with "no payment" (i.e., out-of state Medicaid claims that cannot be billed due to lack of a provider agreement with the applicable state).

#### 10. PRESUMPTIVE CHARITY:

- A. Hoag recognizes that a portion of the uninsured or underinsured patient population may not engage in the traditional financial assistance application process. If the required information is not provided by the patient, Hoag, in certain instances, may make reasonable assumptions based on the Automated Predictive Scoring Tool (ASPT) to qualify patients for Charity Care. ASPT predicts the likelihood of a patient qualifying for Charity Care based on publicly available data sources. ASPT provides estimates of the patient's likely socio-economic standing, as well as the patient's household income and size.
- B. **QMB patients:** Qualified Medicare Beneficiaries: Eligible for charity write off when no secondary or Medi-Cal information is obtainable or balance after secondary other than SOC: Medicare providers and suppliers may not bill people in the QMB program for Medicare deductibles, coinsurance or co-pays, but state Medicaid programs may pay for those costs. Under some circumstances, federal law lets states limit how much they pay providers for Medicare cost sharing. Even when Medicare allows cost sharing, people in the QMB program have no legal obligation to pay Medicare providers Part A or Part B cost-sharing.

#### 11. CATASTROPHIC MEDICAL EXPENSES

- A. Hoag at its discretion, may grant charity care or discounted care in the event of a catastrophic medical expense. These patients will be handled on an individual basis.

#### 12. APPROVAL LEVELS:

- A. Financial assistance determinations will be made only by approved Hoag personnel according to the local levels of authority.
- B. **Notification of Determination**
  - I. Patients will receive notification of Hoag's determination within 30 days of submitting the completed FAP application and supporting documentation.
- C. **Patient Disputes**
  - I. A decision about eligibility for the FAP is determined after the application is reviewed for eligibility based on criteria contained in this policy. Financial assistance shall not be provided on a discriminatory or arbitrary basis, however Hoag retains full discretion to establish eligibility criteria based on sufficient evidence and information provided by the patient or guarantor.

- D. In the event of a dispute, a patient or guarantor may seek review from Hoag management or the Executive Director of Revenue Cycle via email at [PFS@hoag.org](mailto:PFS@hoag.org) or in writing by providing additional information to support the dispute at:

*Hoag Memorial Hospital Presbyterian  
Attn: Executive Director of Revenue Cycle  
2975 Red Hill Avenue, Suite 200  
Costa Mesa, CA 92626*

### 13. CASH DISCOUNT

A. Hoag Hospital

- I. A 35% discount will be given to patients paying cash for services, without requiring evidence of eligibility for the Financial Assistance Program, excluding services only available at a cash rate to all patients. Services with a cash rate are excluded from this discount. Payment is expected at time of service.

B. Hoag Clinic

- I. A 30% pre-payment discount will be given to patients paying cash for services, without requiring evidence of eligibility for the Financial Assistance Program, excluding services only available at a cash rate to all patients. Services with a cash rate are excluded from this discount. Payment is expected at time of service.

### 14. DEFINITIONS:

TERM	DEFINITION
Affordable Care Act (ACA)	A federal mandate that aims to increase the quality and affordability of health insurance.
Amounts Generally Billed (AGB)	A Hoag facility may determine AGB for any emergency or other medically necessary care provided to a FAP-eligible individual by using the billing and coding process the Hoag facility would use if the FAP-eligible individual were a Medicare fee-for-service or Medicaid beneficiary. AGB for the cost of care is the amount the Hoag facility determines would be the total amount Medicare or Medicaid would allow for the care (including both the amount that would be reimbursed by Medicare or Medicaid and the amount the beneficiary would be personally responsible for paying in the form of co-payments, co-insurance, and deductibles).
Automatic Predictive Scoring Tool (APST)	An electronic payment assistance ranking score that estimates the patient's Federal Poverty Level(FPL)percentage and assists in evaluating and determining eligibility criteria.
Charity Care	Medically necessary Hoag services provided at no cost to the patient who lacks or has inadequate insurance who meets defined low-income requirements.

Covered California	California's Health Insurance Marketplace program that provides assistance and shopping for affordable healthcare and possibly financial assistance. Covered California will also assist in determining qualifications for Medi-Cal.
Deposit	When payment arrangements are made, the first installment payment is considered the deposit. The deposit is negotiated, starting at 50% of the total estimated patient liability.
Essential Living Expenses (CA)	Expenses for any of the following: rent or house payment and maintenance; food and household supplies; utilities and telephone; clothing; medical and dental payments; insurance; school or childcare; child or spousal support obligations; transportation and auto expenses, including insurance, gas and repairs, installment payments.
Excluded services	If service deemed not medically necessary , CDU, cosmetic, gastric bypass for weight loss.
Federal Poverty Level(FPL)	The poverty guidelines updated periodically in the Federal Register by the United States Department of Health and Human Services under authority of the subsection (2) of Section 9902 of Title 42 of the United States Code.
Financial Assistance Program	Financial Assistance Program available to patients unable to pay for their care for any services at Hoag.
Full Financial Assistance:	Free care where the patient is not expected to pay anything at all.
Government -Funded Insurance Programs	The following are included in the "government-funded insurance programs" (but is not limited to): <ul style="list-style-type: none"> <li>· Medicare</li> <li>· Presumptive Eligibility (Medi-Cal)</li> <li>· Medi-Cal (CA)</li> <li>· Covered California (CA)</li> <li>· Out of State Medicaid</li> </ul>
Health Insurance Marketplace	A component of the Affordable Care Act (ACA) is the Health Insurance Marketplace (formally known as Exchange). Each state is mandated to have this online venue for customers and small businesses to compare and purchase insurance coverage options and to learn if they are eligible for federal insurance subsidies.
High Medical Cost	California: <p style="text-align: right;">A patient is considered to have High Medical Cost if he or she has either of the following:</p> <ul style="list-style-type: none"> <li>· Annual out of pocket cost incurred by the individual at Hoag that exceeds 10% of the patient's family income in the prior 12 months.</li> <li>· Annual</li> </ul>

	out-of-pocket expenses that exceed 10% of the patient's family income, if the patient provides documentation of the patient's medical expenses paid by the patient or the patient's family in the prior 12 months.
HMO/PPO Payment Rates	The average amount of payment Hoag would receive from all contracted HMOs/PPOs for providing services. This rate, represented as a percentage of total billed charges, is Hoag-specific and updated periodically.
Household or Patient's Family	<ul style="list-style-type: none"> <li>For persons 18 years of age and older, spouse, domestic partner and dependent children under 21 years of age, whether living at home or not.</li> <li>For persons under 18 years of age, parent, caretaker relative and other children under 21 years of age of the parent or caretaker relative.</li> </ul>
Household Income or Patient's Family Income	The wages and fringe benefits in the form of money, property or services. Generally, gross income includes everything received as payment for personal services, such as federal taxable wages, self-employment income, Social Security Income, retirement or pension income, investment income, rental and royalty income.
Insured Patient	A patient who has a third-party payer for all or a portion of their medical expenses.
Medi-Cal (CA)	Medi-Cal is California's federally funded health insurance programs that pay for a variety of medical services for children and adults who have limited resources and low income. Under ACA, Medi-Cal has expanded who may be eligible.
Medically Necessary Services	Services or supplied determined to be proper and needed for the diagnosis, direct care or treatment of the medical condition and meet the standards of good medical practice in the medical community.
Medical Payment Rates	The average amount of payment Hoag would receive from Medicare for providing services. This rate is Hoag specific and updated periodically.
Medicare	Medicare is a federally funded health insurance program for qualified people age 65 or older. Certain people younger than 65 also qualify based on disabilities or renal disease. This program helps with the cost of healthcare but does not cover all medical expenses or the cost of long-term care. It is not based on a low-income. It is not part of the Health Insurance Marketplace, but there are some coverage changes as a result.
Out of State Medicaid	Hoag will bill for Out of State Medicaid provided a contract is approved by the state and/or obtained through an outsourced vendor.
Partial Financial Assistance	The patient does not qualify for Full Financial Assistance (free

	care) but is eligible for a discount and may be expected to pay only a portion of the bill.
Patient	The party who is financially responsible for the services provided.
Payment Arrangements/ Installment Plans	A plan negotiated and agreed to by Hoag and the patient sets the terms of extended payment for services provided by Hoag. Any pre-service payment plan is based on an estimate and the financial counselors and/or schedulers coordinate payment through self-pat supervisor as Final terms are set up after final bill.
Presumptive Charity (APST, SOS and La Amistad programs)	Share ourselves program (SOS) and La Amistad have been pre-determined to meet the program guidelines as these individuals were deemed to be at or below the 200% FPL. SOS and La Amistad complete their own screening and approval. APST is a patient account scoring mechanism. APST score is evaluated bi-annually and calibrated to reflect the charity care policy of Hoag for evaluation an eligibility criteria.
Reasonable Payment Plan (CA)	If Hoag and the patient/guarantor cannot agree on payment terms, Hoag shall create and offer a reasonable payment plan. Monthly payments pursuant to a reasonable payment cannot exceed more than 10% of the patient's family income, excluding deductions for essential living expenses.
Uninsured or Self-Pay Patient	A patient who has no third-party payer for any portion of their medical expenses including a patient whose benefits under all potential sources of payment have been exhausted. No compensable injury for purposes of government programs, workers' compensation, automobile insurance, other insurance, or third-party liability as determined and documented by the hospital. No Medi-Cal/Medicaid coverage or patients who qualify but who do not receive coverage for all services or for the entire stay.

**PLAIN LANGUAGE SUMMARY: HOAG NOTICE OF AVAILABILITY OF FINANCIAL ASSISTANCE**

**MISSION** Our mission as a non-profit, faith-based hospital is to provide the highest quality health care services to the communities we serve. Hoag is committed to working with our patients through any financial issues, including finding ways to make medical care more affordable. Hoag offers financial assistance for medically necessary care to eligible patients who do not have the financial ability to pay for their medical bills. If you're having trouble paying for all or some of your healthcare, we encourage you to talk with one of our Financial Counselors or someone in our business office about how we can help you.

**WHAT IS THE PATIENT FINANCIAL ASSISTANCE PROGRAM?**

Hoag's Financial Counseling Department offers free financial screenings for people who do not have health insurance and cannot pay their Hoag bill, as well as patients who do have insurance, but are

unable to pay their portion of the bill that insurance does not cover.

Our Financial Counselors will review your eligibility for Medicare, Healthy Families Program, Medi-Cal, or other coverage offered through the California Health Benefit Exchange, California Children's Services program, other state- or county-funded health coverage, or charity care. If you already have coverage through one of these programs, please notify our Financial Counselors immediately. Patients ineligible for government assistance may still qualify for discount or charity programs available through Hoag. You may also be referred to [www.OCGOV.com](http://www.OCGOV.com) for local assistance.

If you lack, or have inadequate, insurance, and you meet low- and moderate-income requirements, you may qualify for discounted payment or charity care. Please remember that access to medically necessary health care is not affected by eligibility for financial assistance. Hoag is committed to treating all those who come to us for care.

You may also apply directly for the above programs by accessing their website directly:

Medi-Cal: <http://www.dhcs.ca.gov/services/medi-cal/pages/applyformedi-cal.aspx>

Affordable Care Act: [www.HealthCare.gov](http://www.HealthCare.gov) to apply by phone Call 1-800-318-2596

Medicare: [www.ssa.gov/medicare/apply.html](http://www.ssa.gov/medicare/apply.html)

Hoag Charity care program: [www.Hoag.org](http://www.Hoag.org) (Patient & Visitors tab, Billing, Charity Care Application)

Free or Discounted Care: For those who qualify for financial assistance, free or discounted care is available. The amount discounted is determined by your family income as compared to the Federal Poverty Level (FPL). Free care is offered to patients with family income of 200% or less of FPL and discounted care is offered to patients with family income of 201% to 400% of FPL.

A patient who is eligible for financial assistance from Hoag may not be charged more than the amount generally billed for emergency or other medically necessary care.

#### HOW AND WHEN TO APPLY

Please contact our Financial Counselors immediately after discharge or completion of services by calling 949-764-5564 or by e-mail at [FC@hoag.org](mailto:FC@hoag.org).

If you have questions or would like to receive a financial assistance application form, please contact:

- By telephone: 949-764-8413
- On our website at [hoag.org](http://hoag.org)
- By visiting in person at one of the following locations:

Hoag Hospital- Newport Beach Cashier's Office One Hoag Drive Newport Beach, CA 92662 Hours: Monday through Friday 8:30am to 4:30pm or by email	Hoag Hospital- Irvine Cashier's Office 16200 Sand Canyon Ave Irvine, CA 92618 Hours: Monday through Friday 8:30am to 4:30pm or by email	Patient Financial Services Attn: Charity Care Specialist 2975 Red Hill Ave., Suite 200 Costa Mesa, CA 92626 Hours: Monday through Friday 8:30am to 4:30pm or by email at
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at FC@Hoag.org	at FC@Hoag.org	<a href="mailto:PFS@Hoag.org">PFS@Hoag.org</a>
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We are committed to making information about the Hoag Financial Assistance Program available in the communities we serve in a manner that is easy to understand. In addition to English, this summary, Hoag Financial Assistance Policy, and Hoag Financial Assistance Application form, are available in other languages, including Arabic, Chinese, Farsi, Korean, Spanish and Vietnamese. Please visit [hoag.org](http://hoag.org)

**CONFIDENTIALITY**

We understand that the need for financial assistance can be a sensitive and deeply personal issue. We are committed to maintaining the confidentiality of requests, information and funding.

**Reference:** n/a

**Review and/or input for this procedure was given by the following:**

Internal Revenue Code Section 501©; 26 C.F.R. 1.501(r) (1)-1.501(r) (7); California Health & Safety Code

**Title and version of IFU:** n/a

**All Revision Dates**

5/20/2024, 12/29/2023, 5/19/2021, 1/15/2020

**Approval Signatures**

Step Description	Approver	Date
VP Approval	Andrew Guarni: VP EX AND CFO	5/20/2024
VP of Hoag Clinic Approval	Michael Gam: VP AND CFO HOAG CLINIC	5/20/2024
Policy Management Approval	Anna Do: CORPORATE COMPLIANCE ASSOCIATE	5/20/2024
Owner Approval	Kathleen Graham: EXEC DIR REVENUE CYCLE	5/17/2024

**Applicability**

Hoag Clinic, Hoag Memorial Hospital Presbyterian

## Appendix B

### Hoag Hospital Quantifiable Community Benefit for CY2023

#### A. Unreimbursed Cost of Direct Medical Care Services - Charity Care

*Definition: The direct cost of medical care provided by Hoag; consists of unreimbursed costs (calculated utilizing cost-to-charge ratios) of providing services to the county indigent population, charity care, and care provided to patients identified and referred by the SOS Medical and Dental Clinic*

	CY2022	CY2023
Charity Care	\$ 5,753,801	\$ 5,005,987
MediCal/Cal Optima Cost of Unreimbursed Care	\$ 58,670,816	\$ 65,364,894
Medicare Cost of Unreimbursed Care	\$ 122,039,194	\$ 191,128,052
<b>Total Cost of Unreimbursed Direct Medical Care Svcs</b>	<b>\$ 186,463,811</b>	<b>\$ 261,498,933</b>

#### B. Benefits for Vulnerable Populations

*Definition: Services and support provided to at-risk seniors and children, the indigent, uninsured/underinsured and homeless to facilitate access to preventive and immediate medical care services.*

Community Health Services	\$ 2,017,364	\$ 1,880,331
Subsidized Clinical Specialty Services	\$ 175,298	\$ 158,317
Cash and In-Kind Contributions	\$ 6,514,699	\$ 5,321,966
Community Benefit Operations	\$ 1,276,674	\$ 1,221,159
<b>Total Benefits for Vulnerable Populations</b>	<b>\$ 9,984,035</b>	<b>\$ 8,581,773</b>

#### C. Benefits for the Broader Community

*Definition: Health education, prevention and screening programs, information and referral services, and supportive services available to community residents.*

Community Health Services	\$ 359,601	\$ 463,169
Health Profession Education	\$ 183,517	\$ 240,963
Subsidized Clinical Specialty Services	\$ 87,212	\$ 44,809
Cash and In-Kind Contributions	\$ 3,730,233	\$ 3,164,907
<b>Total Benefits for the Broader Community</b>	<b>\$ 4,360,563</b>	<b>\$ 3,913,848</b>

Total Community Benefit and Economic Value	200,808,409	273,994,554
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<b>Total Community Benefit and Economic Value (excluding Medicare Cost of Unreimbursed Care)</b>	<b>78,769,215</b>	<b>82,866,502</b>
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#### Notes:

\*The CY 2023 year included 12 months: January 1, 2023-December 31, 2023

## Appendix C

### Hoag Hospital Community Benefit Expenditures by Program

#### Benefits for Vulnerable Populations

#### Net CB Expenditure

##### ***Community Health Services***

Mental Health Center-Community Health	\$ 1,183,633
Center for Healthy Living-Community Health	\$ 400,672
Community Nurse Navigation-Community Health	\$ 296,027
<b>Total Community Health Services</b>	<b>\$ 1,880,331</b>

##### ***Subsidized Clinical Specialty Services***

ECU Call Panel Fees for Uninsured Patients (Southern CA Hospitalists)	\$ 158,317
<b>Total Subsidized Clinical Specialty Services</b>	<b>\$ 158,317</b>

##### ***Cash and In-Kind Contributions***

Access California Services	\$ 75,000
Age Well Senior Services	\$ 75,000
Alzheimer's Family Center	\$ 1,326,466
Alzheimer's Family Center-Transportation	\$ 50,000
Alzheimers Orange County	\$ 60,000
American Academy of Pediatrics: Clinic in the Park	\$ 50,000
Bracken's Kitchen	\$ 50,000
Cancer Kinship	\$ 25,000
Casa Teresa	\$ 25,000
CHOC Foundation-Providence Speech and Hearing Center	\$ 100,000
CHOC Foundation-Wellness on Wheels (WOW)	\$ 50,000
CIELO (Community for Innovation, Entrepreneurship, Leadership & Opportunities)	\$ 50,000
City of Costa Mesa-Transportation	\$ 75,000
City of Huntington Beach-Transportation	\$ 50,000
City of Newport Beach-Oasis Senior Center-Transportation	\$ 50,000
Community Action Partnership of Orange County	\$ 100,000
Community Health Initiative of OC	\$ 50,000
Community Senior Serve Inc	\$ 50,000
Council on Aging Orange County	\$ 110,000
Families Forward	\$ 125,000
Girls Inc	\$ 100,000
Human Options	\$ 50,000
Hurtt Family Health Clinic	\$ 25,000
Innovative Housing Opportunities	\$ 25,000

In-Kind Donations to Nonprofits (Equipment, Furniture, etc)	\$ 10,500
Irvine Adult Day Health Services-Transportation	\$ 50,000
Korean Community Services	\$ 100,000
Laguna Beach Community Clinic	\$ 50,000
Laguna Beach Seniors (The SusiQ)	\$ 25,000
Latino Health Access	\$ 65,000
Laurel House- Hope Harbor	\$ 25,000
Mariposa Women and Family Center	\$ 25,000
Mercy House	\$ 25,000
MOMS Orange County	\$ 100,000
National Alliance of Mental Health (NAMI)	\$ 250,000
One OC: Kid Healthy	\$ 25,000
Orange County Community Housing Corporation	\$ 25,000
Orange County United Way	\$ 125,000
Pediatric Adolescent Diabetes Research Education Foundation	\$ 50,000
Phoenix House Orange County Inc	\$ 100,000
Project Self Sufficiency	\$ 50,000
Public Law Center	\$ 100,000
Save Our Youth (SOY)	\$ 50,000
Second Harvest Food Bank	\$ 75,000
Serving Kids Hope	\$ 30,000
Serving People in Need (SPIN)	\$ 50,000
Share Ourselves Corporation	\$ 985,000
South County Outreach	\$ 25,000
The Cambodian Family	\$ 50,000
The Purpose of Recovery	\$ 25,000
Veterans Legal Institute	\$ 25,000
Vietnamese American Cancer Foundation	\$ 25,000
Young Lives Redeemed	\$ 35,000
<b>Total Cash and In-Kind Contributions</b>	<b>\$ 5,321,966</b>

**Community Benefit Operations**

Community Health Department Operations	\$ 933,302
Dedicated Staff	\$ 287,857
<b>Total Community Benefit Operations</b>	<b>\$ 1,221,159</b>

**Total Benefits for Vulnerable Populations \$ 8,581,773**

**Benefits for the Broader Community****Net CB Expenditure*****Community Health Services***

Community Education and Outreach (various Hoag departments)	\$	92,126
Community Flu Immunization Clinics	\$	333,716
Project Wipeout	\$	37,327
<b>Total Community Health Services</b>	<b>\$</b>	<b>463,169</b>

***Health Professions Education***

Care Management Internships	\$	22,800
Health Scholars Program	\$	196,700
HOI Internships	\$	10,584
Nuerosciences Internships	\$	500
Rehabilitation/Physical Therapy Internship	\$	10,379
<b>Total Health Professions Education</b>	<b>\$</b>	<b>240,963</b>

***Subsidized Clinical Specialty Services***

Care Management: ETOH/Psych/Ancillary Patient Transfer Program	\$	44,809
<b>Total Subsidized Clinical Specialty Services</b>	<b>\$</b>	<b>44,809</b>

***Cash and In-Kind Contributions***

AED Donations	\$	22,419
Be Well Foundation/MIND OC	\$	1,000,000
Big Brother Big Sisters Of Orange County	\$	25,000
CHOC Foundation-Pediatric Diabetes Services at the Allen Diabetes Center	\$	1,020,900
Community Disaster Preparedness/Readiness	\$	4,560
Crime Survivors Inc	\$	25,870
Epilepsy Support Network	\$	35,000
In-Kind Office Lease/Meeting/Parking Space for Non-Profits	\$	806,158
LGBTQ Center OC	\$	50,000
Orange County Asian and Pacific Islander Community	\$	25,000
Orange County Bar Foundation	\$	50,000
Orange County Human Relations/Groundswell	\$	75,000
Radiant Health Centers/formerly AIDS Service Foundation	\$	25,000
<b>Total Cash and In-Kind Contributions</b>	<b>\$</b>	<b>3,164,907</b>

**Total Benefits for the Broader Community \$****3,913,848**

*Prepared By:*

**Minzah Z. Malik, MPH, MBA**

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