



## Payment Plan Proposal Form

Branch: \_\_\_\_\_ Date: \_\_\_\_\_ Work Order #: \_\_\_\_\_

Client Name: \_\_\_\_\_ Funding Specialist: \_\_\_\_\_

Order Type & Equipment: \_\_\_\_\_

Order Amount: \_\_\_\_\_ Client Due Amount: \_\_\_\_\_

Date Care Credit or Other Credit Denial was received: \_\_\_\_\_  
(Please attach proof of Credit Denial)

### Monthly Installment Payment Proposal

Initial Payment Amount (To be made at Time of Payment Plan Approval): \_\_\_\_\_

Following Payment Amount (To be made at Time of Delivery): \_\_\_\_\_

Remaining Payments will be made on a monthly basis after delivery unless the any of the above payments are skipped as noted here: *First payment skipped* *First two payments skipped*  
Reason/Justification for skipping any of the above payments:

*Payer prohibits payment prior to delivery* *Other:* \_\_\_\_\_

Monthly Payment Amount: \_\_\_\_\_ Estimated Date to Begin Payments: \_\_\_\_\_

Number of Months: \_\_\_\_\_

Requested by: \_\_\_\_\_ Date: \_\_\_\_\_

Approved by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Branch Manager, General Manager or Regional Area Director)

#### Approval Thresholds:

Branch Leader \$0- \$1,000 in total out of pocket expenses; Regional Area Director over \$1,000 in total out of pocket expenses.

#### National Seating and Mobility Payment Plan Options and Guidelines:

The payment plan is limited to five total payments. Two payments can be made prior to or at delivery. Three payments to be made post-delivery.

- The first payment is collected at the time the payment plan is approved.
  - If the payer prohibits payment being collected prior to delivery, this payment can be moved to a future additional payment or combined with a future payment.
  - If a client is unable to make initial payment, this payment can be moved to a future additional payment or combined with a future payment with Branch Leader or RAD approval.
- The second payment is collected at the time the delivery is scheduled.
- If the payer prohibits payment being collected prior to delivery, this payment can be moved to a future additional payment or combined with a future payment.
  - If a client is unable to make initial payment, this payment can be moved to a future additional payment or combined with a future additional payment with Branch Leader or RAD approval.
- Payments 3-5 can be made post-delivery by automatic deduction.
  - If a client does not have a credit card, payments can be made by check or money order.
  - Additional payments can be reviewed and approved by the Branch Leader or RAD based on individual client needs.