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Bathroom modification: quote and funding checklist

Use this sheet when discussing a tub, shower or smaller bathroom change. Start with the funding program's own requirements, then ask suppliers and installers to price the same scope.

> Keep this copy at home. Send requested medical or financial documents directly through the program's official process. This sheet stays in your browser or on paper; it has no submission form.

1. Confirm the program's rules

Program and date contacted:

- ☐ Ask whether the proposed work and any alternatives can be assessed.
- ☐ Ask who must evaluate the need and which documents are required.
- ☐ Ask whether the supplier or installer must meet program requirements.
- ☐ Ask whether approval is needed before a deposit, purchase or work begins.
- ☐ Confirm any spending limit, your share, payment route and decision timeline.

Next action and who will take it:

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2. Identify the proposed product and work

Ask the supplier or installer to specify	Answer / document reference
Brand, model/SKU, dimensions, door direction, seat and threshold	
Basic configuration and separately priced optional features	
Who confirms access, clearance and the person's use of the equipment	
Who confirms water heater, plumbing and electrical requirements	
Who installs, obtains permits and responds to leaks or faults	

For help choosing what to price, see elderhearth.com/posts/best-walk-in-tubs-2026 and elderhearth.com/posts/best-walk-in-showers-for-seniors-2026.

3. Request a written, itemized estimate

For each line, record an amount, “included in [line],” “excluded,” or “awaiting estimate.” An empty field or an unpriced exclusion should not be counted as $0.

Cost or condition	Amount / status / responsible party
Base product and optional features	
Delivery, access or handling charges	
Tax	
Installation labor and materials	
Plumbing, electrical and water heater work	
Old fixture removal, disposal and surface repairs	
Permits and inspections	
Separate contractor estimates and unpriced exclusions	
Total quoted amount and what it excludes	
Quote validity, deposit and payment milestones	
Cancellation, return, restocking and warranty terms	

Example of a complete status entry: “Plumbing: excluded from the product quote; separate installer estimate requested.” It remains an unknown cost until that estimate arrives.

4. Before signing or paying

- ☐ Confirm whether the estimate itself creates a fee, deposit or commitment.
- ☐ Obtain the program's written decision and confirm which costs it accepts.
- ☐ Resolve unpriced exclusions and compare the same scope across offers.
- ☐ Keep the quote, approval, contract and warranty as separate documents.

Check program requirements directly: VA HISA · USDA Section 504 · Medicaid HCBS. For local services, contact the Eldercare Locator at 800-677-1116.

Prepared October 21, 2026. This general worksheet supplements the relevant program's current application checklist. A supplier's quote is a cost proposal, not a program decision.