

# PATIENT ADVOCATE FOUNDATION



*Solving  
insurance and  
access issues  
since 1996*


ANNUAL REPORT 2009-2010



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A yellow canoe is positioned on a wooden dock, angled towards the right. The dock is made of light-colored wooden planks. In the background, a calm lake reflects the surrounding dense forest of green trees under a clear blue sky. The scene is peaceful and scenic.

**64,185** PATIENTS RECEIVED DIRECT,  
SUSTAINED ASSISTANCE FROM  
PAF THIS YEAR, UP **33%**  
FROM LAST YEAR.



## A letter from our CEO

### NANCY DAVENPORT-ENNIS

A message to our friends...both old and new...

This fiscal year was a landmark year for Patient Advocate Foundation as our patient volume grew to 64,185 patients, an increase from 48,364 patients last year, served by more than 200 fulltime employees. PAF relocated to a new national headquarters formerly occupied by Nextel who donated furnishings and information technology infrastructure of almost one million dollars. The PAF team, including our outstanding Board of Directors and our Scientific Committee members, personify excellence routinely, for which they were recognized by President Obama in his congratulatory letter shared with our guests at our formal opening and by Congressman Robert C. Scott who read into the minutes of the Congressional Record on the floor of the United States House of Representatives attributes to their excellence and that of the leadership of PAF. Additional congratulations were received from many others including Senator Jim Webb, Senator Mark Warner, Congressman Rob Wittman and President of the PAF Board of Directors, Christian Downs as well as Dr. Bruce Avery, sustaining Executive Board member from Tennessee.

Patient Advocate Foundation has been ranked as a four star charity, the highest designation awarded nationally, by the Charity Navigator, "America's premier charity evaluator". Quoting from their letter sent by Ken Berger, CEO, "PAF executes its mission in a fiscally responsible way, and outperforms most other charities in America. This exceptional designation from Charity Navigator differentiates Patient Advocate Foundation from its peers and demonstrates to the public it is worthy of their trust." This designation is a tribute to the leadership and management of Patient Advocate Foundation by the President of Mission Delivery, Beth Patterson and President of Operations, Fran Castellow joined by their Executive Roundtable colleagues cited in this Annual Report and to the selfless service of the compassionate professionals who serve our patients at PAF. The unselfish contributions of our Executive Board of Directors and our Scientific Committee physicians and researchers also contributed to this recent recognition of PAF.

Passage this year of the Patient Protection Affordability Care Act included insurance reforms built across more than one and one half decades of PAF patient data documenting access to healthcare issues experienced by more than 500,000 patients who have been served by Patient Advocate Foundation since 1996. Through these patient experiences, Patient Advocate Foundation contributed significantly to the insurance reform measures providing data to drive the development of policy language eliminating pre-existing conditions for both children and adults. Data capturing the experiences of thousands of families moved into bankruptcy due to medical debt accrued when insurance policy lifetime limits were reached supported the inclusion of the elimination of lifetime limits on health insurance benefits. Coverage for children on their parent's policy up to the age of 26 years was also supported by PAF data as was the implementation of caps on annual out-of-pocket expenditures by individuals and families. To the courageous patients and their loved ones who allow PAF to serve them, thank you, for you have contributed to improved health insurance benefits for millions of Americans.

Our patients do capture who we are far more eloquently than those of us who are privileged to serve them, so with this acknowledgement, I wish to close my greetings to you with three greetings received from our patients this year. May you be as touched as I and may you each know the gratitude we feel for your support of our mission and purpose.

*Dear Heroes,*

*A few months ago I received an unexpected bill from my oncologist's office for more than \$1,800. I was shocked to learn that my insurance plan had a \$50.00 co-pay for each of the many Neupogen injections I had received...*

*I've been unable to work due to my illness and had no idea how I'd ever be able to pay this bill, let alone cover the co-pays that would be generated by the remainder of my treatments. My oncologist's office gave me the names of several organizations to contact for assistance, but they are diagnosis-specific and don't offer assistance for ovarian cancer. Then one of the organizations suggested I call PAF. From the very first conversation with your counselor, I felt that someone cared about finding a solution. Your counselor took time to ask the right questions. Imagine my relief and sense of hope when she advised me PAF could help!*

*As far as my husband and I are concerned, you all are angels and an answer to prayer.*

*Diana  
California*

*Dear Sir:*

*I'm writing this letter to express my heartfelt appreciation to the PAF. I have worked hard all my life and have been fortunate enough to have never been unemployed. I've never drawn an unemployment check or received any form of assistance. At 58 years of age, when my cancer diagnosis reached me I had never stayed overnight in a hospital. Along with the worry about my future and medical condition I had the added worry of medical bills while receiving only 60% of my pay (through disability benefits). The assistance from your foundation has greatly relieved my stress. You have restored my faith in humanity. I am very grateful for your financial assistance.*

*Ken  
New York*

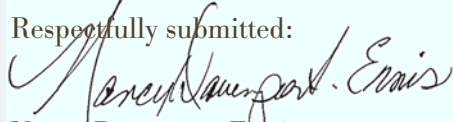
*Dear Laura, (PAF Case Manager)*

*Thank you for your foundation's most welcome grant of \$2,000.00 to assist in co-pays for the medication prescribed in relation to my diagnosis. I am the mother of three and my youngest is six years old when I received the news that I had cancer. One day last spring I returned my doctor's call on my lunch hour at school where I was a teacher, and received my diagnosis. An hour later, I went into a meeting where I was being laid off. I remember feeling an odd sense of relief that I would not have to look for a new job, since I was going to be dead!*

*That wasn't the last time being dead looked like a good option...The next time came when I looked at the bills for my treatment. We were responsible for paying \$7,659.00. My family and I will always be grateful to the PAF for assistance given to us during this period in our lives.*

*Craig and Theresa  
Colorado*

Respectfully submitted:



Nancy Davenport-Ennis  
Chief Executive Officer and Co-Founder



## A WORD FROM BOARD PRESIDENT CHRISTIAN DOWNS, MHA, JD

We are now well into reforming our health care system, and whether it happens by legislation, regulation, or the free market, the voice of the patient must always be heard. I am proud to write that Patient Advocate Foundation (PAF) remains committed to its core mission of safeguarding patients in need.

PAF continues to assert itself as a leader among advocacy organizations by championing access to quality healthcare and preserving financial stability among patients who face serious or life-threatening diseases.

Look at our accomplishments this year. PAF professional staff provided direct, sustained assistance to more than 64,000 patients. This involved more than 800,000 contacts to relevant stakeholders in order to bring resolution to healthcare access issues. Staff have worked tirelessly on behalf of patients to negotiate write offs, charity care access, and to resolve coding/billing errors. The value of debt relief obtained by PAF patients tops a staggering \$17.5 million. Since inception in 2004, the PAF Co-Pay Relief Program has served more than 36,000 patients and provided more than \$96 million in cash assistance. Additionally, 2,393,430 pages were viewed this year by PAF website visitors.

I want to thank each member of the staff. Because of their hard work and selfless devotion to America's patients, all of our success is possible.

In reality our healthcare system will always be changing and reforming. One constant, however will be the commitment of the Patient Advocate Foundation to be there for patients. From navigating a complex insurance issue to offering a kind word and encouragement, if you are a patient PAF is here for you. Always.

On behalf of the Board of Directors of Patient Advocate Foundation, we thank the leadership, staff, patients, and supporters for their commitment.

Christian Downs  
President, Board of Directors



# PATIENT ADVOCATE FOUNDATION BOARD OF DIRECTORS

## EXECUTIVE BOARD

**Nancy Davenport-Ennis**  
Founder & CEO  
Patient Advocate Foundation

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Executive Director  
Association of Community Cancer Centers

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Cigna Academic Health Solutions  
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Patient Advocate Foundation

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Director, Center for Research on Minority Health (CRMH)  
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and Research on Disparities in Health and Training (EXPORT)  
Health Disparities Education, Awareness, Research & Training  
(HDEART) Consortium  
Department of Health Disparities Research  
The University of Texas  
M. D. Anderson Cancer Center

**Deborah Parham Hopson, PhD, RN, FAAN**  
Assistant Surgeon General  
Associate Administrator for HIV/AIDS  
Health Resources and Services Administration  
U.S. Department of Health and Human Services

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Clinical Professor of Law  
University of Wisconsin

**Bruce Avery, MD**  
Hematology-Oncology Knoxville

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PAF Scientific Chair  
Director, NMDP Collections  
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Division of Internal Medicine  
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Deputy Director, Johns Hopkins Institute for Clinical and  
Translational Research  
Johns Hopkins

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Associate Director for Clinical Investigations  
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Northwestern University – Feinberg School of Medicine

**Nicholas J. Petrelli, MD, FACS**  
Medical Director  
Helen F. Graham Cancer Center

## HONORARY BOARD

**Paula Trahan Rieger, RN, MSN, AOCN, FAAN**  
Chief Executive Officer  
Oncology Nursing Society

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Executive VP & Chief Administrative Officer  
US Oncology (Retired)

**The Honorable Mary T. Christian**  
Virginia House of Delegates (Retired)

**Doris Simonson**  
Mother of Cheryl Grimmel

**The Honorable Pat Dougherty**  
Missouri State Senate (Retired)

**Richard D. Carter, Esquire**  
Richard D. Carter, PLLC

**Sheldon Weinhaus, Esquire**  
Weinhaus & Potashnick

**Edward G. Connette, Esquire**  
Essex Richards, PA

# 2009-2010 Highlights

## BREAKAWAY FROM CANCER



Patient Advocate Foundation (PAF) was pleased to partner for a second year with *Breakaway from Cancer* (BFC), a national fundraising and educational initiative founded by Amgen in 2005 as a complimentary component to the Amgen Tour of California (AToC), a world-class professional cycling event. The goal of BFC is to raise awareness of the important resources available to cancer patients including prevention, education, patient care, advocacy and financial support.

“Patient Advocate Foundation was honored to partner in the 2010 *Breakaway from Cancer* initiative as Amgen raises awareness of the many beneficial resources available to cancer patients during what can be an uphill battle,” said Nancy Davenport-Ennis, President and CEO of Patient Advocate Foundation. “Seventy-six percent of the patients contacting PAF in 2009 were diagnosed with cancer, so we know first-hand the importance of educating cancer patients about their options. We recognize that it takes more than one person to fight cancer and we hope that through this team effort, we can help cancer patients cross that finish line!”

In addition to supporting the patient programs and services offered by Patient Advocate Foundation, this year’s *Breakaway from Cancer* also raised funds to support the Prevent Cancer Foundation, The Cancer Support Community and the National Coalition for Cancer Survivorship. Additional nonprofit partners in the initiative include The Lance Armstrong Foundation, The Patrick Dempsey Center for Cancer Hope & Healing and Stand Up to Cancer.

Being a partner in *Breakaway from Cancer* this year provided a consistent and coordinated opportunity to facilitate wide distribution of information to the public attending the BFC related events, educating them about the services provided by PAF. Lastly, and certainly most importantly, BFC has created a one of its kind joint partnership between four of the leading patient advocacy organizations serving the cancer community. Working together, we have made great strides towards providing comprehensive patient education and navigation services to the public including messaging about cancer prevention, providing support during diagnosis and treatment phases, bringing remedy to patient care barriers and offering survivors opportunities to give back. PAF is appreciative of the partnership we have with Amgen and the BFC partners...it take a team to fight cancer and we are proud to be part of the team.

As a partner, PAF placed great emphasis on promoting BFC this year in an effort to raise awareness of the initiative. PAF shared information about BFC with the public via our PAF website, PAF Facebook page and PAF LinkedIn account as well as executed targeted, personalized communication strategies to patients and providers who work and live in California as well as the cities hosting LiveStrong Challenges throughout 2010. Additionally, in May 2010, we employed earned media strategies, advertizing and the distribution of a Press Release nationally to promote the BFC partners, and the impending AToC. These efforts garnered over 1 million reader impressions for BFC in the California markets.



# 2009-2010 Highlights

## BREAKAWAY FROM CANCER

PAF staff exhibited at the BFC Charity Rides in both Thousand Oaks and Santa Rosa, California in the Spring of 2010, precursor events to the Amgen Tour of California. PAF was able to offer on-site education and counseling with regard to access to care and insurance concerns - bilingually in English and Spanish, distributing educational materials to those we interacted with. Of the estimated 500 attendees at both events Patient Advocate Foundation acquired personal contacts within the local community, and contacts among local and regional healthcare personnel – physicians, nurses, social workers, scientists, and other influential professionals. One local cancer survivor expressed her appreciation stating that Patient Advocate Foundation enabled her to maintain her insurance coverage through a transitional time in her life.

In May, 2010 several PAF staff members, including Nancy Davenport-Ennis, Brendan Bietry, Senior Case Manager and Jamilla Williams, Director of Case Management, participated in the 9-day Amgen Tour of California, exhibiting in the BFC booth at Festival Park in each host city. Brendan Bietry addressed a group of cancer survivors at the Breakaway Mile pre-event in Santa Cruz, CA and held the BFC banner high during the Breakaway Mile March. He also served on the judging panel that selected Trisha Bland, a local cancer survivor of Bakersfield, CA to participate in the stage winning jersey presentation. Jamilla Williams addressed the local contingency in Modesto, CA and had the opportunity to celebrate with cancer survivors and their families within the community during the Breakaway Mile. Additionally, PAF was granted the honor to meet the Breakaway Mile Champion, Sandy Howard. During Sandy's emotional battle with cancer, she self-published a book entitled "Life After Chemo", which was available to the Modesto community attending the Breakaway Mile. The book, which sits on the bookshelf in the PAF case management suite, serves as an inspiration to the staff and the patients we serve.

Additionally, Nancy Davenport-Ennis spoke at the Survivor Mile pre-function event at Bakersfield, the PAF Stage of BFC, and had the honor of speaking personally with the Mayor of Bakersfield, The Honorable Harvey Hall, educating him about BFC and PAF while Alan Richardson, Chief Development Operations Officer spoke at the Survivor Mile pre-function event at Thousand Oaks.

Throughout the Amgen Tour of California, Patient Advocate Foundation continued to make an indelible impression on the various communities that hosted the race. PAF was able to distribute thousands of educational publications, t-shirts, and magnets in addition to providing live web demonstrations of the recently launched "National Underinsured Resource Directory" an online tool for underinsured patient's right at the booth during each state of the race!

Both local and national PAF representatives proactively addressed the crowds – many individuals approaching the *Breakaway from Cancer* tent have already benefitted directly from our patient services in the past, most notably those who were assisted by our Co-Pay Relief program. A cancer survivor who attended the Big Bear Stage and visited the BFC booth expressed her appreciation to PAF with these words *"your group's advocacy and concern on behalf of cancer survivors like myself moved me greatly. Thank you for honoring me by allowing me and my boyfriend to be so close to the finish line action so comfortably and graciously."*

# 2009-2010 Highlights

## PATIENT ADVOCATE FOUNDATION NATIONAL HEADQUARTERS OPENS



PAF is excited to announce that in April 2010, Patient Advocate Foundation relocated its National headquarters office to Hampton, Virginia. The relocation was made possible by the support of the building owner, Lexington Group, LLC who sponsored the required build out of the office space to meet our specific needs as well as the generous gift of office furnishings and technology infrastructure by the former tenant, Sprint Nextel. The combined value of these generous donations top nearly 1 million dollars and without them, the relocation would not have been possible.

While the new Headquarters office location is a mere 6 miles from the previous office, the new facility offers greater workflow functionality, a robust, state of the art technology center, increased security controls both in and outside of the facility, improved employee training locations and an overall enhanced work environment for our employees. Collectively, the improvements to our headquarters office have resulted in greater program administration efficiencies, ease of technology management, strengthening of security controls and have assisted in maintaining our high employee satisfaction levels.

PAF marked the official grand opening of its new national headquarters in Hampton Roads, Virginia with a widely attended ribbon-cutting ceremony. President Obama sent a personal letter of congratulations for PAF's continued service to Americans who are challenged with hurdles to accessing important health care services. Senator Webb's regional Director Charles Stanton joined Congressman Robert C. Scott (D-3rd-VA), Virginia Senator John Miller, Delegates Glenn Oder and Robin Abbott, as well as Hampton Vice Mayor George Wallace and former Newport News Mayor Joe Frank, to formally participate in the ribbon-cutting ceremony. Representatives from donor organizations including American Cancer Society, Lance Armstrong Foundation, and Susan G. Komen for the Cure, including Patient Advocacy Directors from Amgen, Cephalon Oncology, Millennium Pharmaceuticals, Novartis and sanofi aventis were also in attendance. Local dignitaries from Hampton Roads included James Eason, Hampton Director of Economic Development, and representatives from Riverside Health Systems and Sentara Health Systems.

Personal letters of congratulations from Virginia's U.S. senators, Mark Warner and Jim Webb, were read by officials from their staff who participated in the ceremony. "You are a true example to organizations aspiring to improve the health of Americans" said Senator Mark R. Warner.

"For the last fourteen years, The Patient Advocate Foundation has served Virginia residents and Americans across the country struggling with illness and access to care issues who have nowhere else to turn," said Congressman Robert C. Scott. "As PAF moves to its new headquarters in Hampton, I look forward to continuing our collaborative work to ensure that patients across the nation are protected from health care discrimination and the many forms that it takes."

# 2009-2010 Highlights

“We are pleased to expand our national headquarters to accommodate staff growth necessary to meet the demands of the patient volume and case complexity. Moving to a larger space was necessary to support the growing number of patients we serve and the growing number of programs we provide,” said Nancy Davenport-Ennis, Founder and CEO of Patient Advocate Foundation. “For the last 14 years, PAF has been dedicated to improving the quality of life of patients diagnosed with chronic, debilitating and life threatening conditions access to health care issues that if unresolved threaten to stop or delay therapeutic intervention. PAF is dedicated to assuring that patients across the nation are protected from health care discrimination in the many forms that it takes.”



“Our healthcare delivery system can be quite difficult to navigate, and your efforts to help bridge the gap between patient and provider are admirable,” wrote Congressman Robert J. Wittman (R-1st-VA). “At the same time, your faithful advocacy on behalf of all of those with life-threatening illnesses is essential for ensuring that patients all over the country get fair and proper treatment. I hope your new location provides you with a comfortable atmosphere for which to extend your helping hand.”

Davenport-Ennis states, “The opening of this expanded national headquarters is a tribute to years of dedicated service to patients by the members of our executive, scientific and honorary boards of directors. In combination with the outstanding operational leadership of our PAF Management team working with the full time professional team members of PAF. The generosity of our supporters, including corporate donors, community businesses, national nonprofit organizations, our United States government as well as our own state of Virginia and local government leaders have underwritten our continued opportunity to meet the needs of families in crisis due to acute illness.”

## PATIENT ADVOCATE FOUNDATION LAUNCHES THE NATIONAL UNDERINSURED RESOURCE DIRECTORY



In February, 2010 PAF, through the support of the Patient Action Council Delegates, unveiled *The National Underinsured Resource Directory*, which is intended to help underinsured individuals and families locate important resources and seek alternative coverage options or methods to cover their healthcare needs.

The Patient Action Council Delegates are nurses and healthcare thought leaders of national advocacy initiatives within five of our nation’s leading Pharmaceutical and Biotechnology companies. Each year, the PAF Patient Action Council addresses one major healthcare access issue. This year, the issue selected was the development of a national resource for underinsured Americans, who have health insurance benefits that do not adequately protect them from high out-of-pocket medical expenses. Due to changes in insurance benefits and limited caps, the

# 2009-2010 Highlights

number of underinsured American adults has risen dramatically to an estimated 25 million in 2007 as reported by The Commonwealth Fund. In the last year, PAF saw an increase of 23.17% in underinsured patient issues.

The National Underinsured Resource Directory is available through an online interactive tutorial program, and a written publication that supports this program. The comprehensive online tool helps underinsured Americans faced with high out-of-pocket costs locate valuable resources and action steps to provide financial relief. The information is also provided through an easy to manage pocket envelope of resource cards offering suggestions for resolving specific issues as well as a list of national and state specific resources.

“We are pleased to provide this valuable tool to the millions of Americans facing problems securing critical medical care services due to their inadequate health insurance benefits,” said Nancy Davenport-Ennis, President and CEO of PAF. “Patients across the country will be able to gather information from the Q&A and action steps we have put together, improving their access to the quality care they need and deserve.”

To access The National Underinsured Resource Directory, visit: <http://patientadvocate.org/help4u.php>

## **PATIENT ADVOCATE FOUNDATION RECEIVES 4-STAR RATING FOR SOUND FISCAL MANAGEMENT FROM CHARITY NAVIGATOR**




PAF was pleased to learn that we earned Charity Navigator's 4-star rating for sound fiscal management this year. PAF was also rated as the second highest "top-notch" charity for excelling in three areas: financial, accountability and transparency, and effectiveness and results.

Charity Navigator, America's premier independent charity evaluator, rates charities on their ability to efficiently manage and grow their finances, and works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of over 5,500 of America's largest charities. Approximately one quarter of the charities evaluated by Charity Navigator have received their highest rating, indicating that PAF executes its mission in a fiscally responsible way, and out-performs most other charities in America.

“On behalf of Charity Navigator, I wish to congratulate Patient Advocate Foundation on achieving our coveted 4-star rating for sound fiscal management,” said Ken Berger, President/Chief Executive Officer of Charity Navigator, in a letter to PAF. “This "exceptional" designation from Charity Navigator differentiates Patient Advocate Foundation from its peers and demonstrates to the public it is worthy of their trust.”

“Patient Advocate Foundation is honored to receive this rating from Charity Navigator, and we know that our mission to put the healthcare needs of all Americans first has never been more important as we move into a new era of healthcare reform,” said Nancy Davenport-Ennis, President and CEO of PAF. “Since its inception in 1996, PAF has worked to help Americans efficiently access the quality healthcare they deserve. Those who are interested in donating to PAF can do so knowing that PAF is an organization that is fiscally responsible and effective.”



A photograph of a beach scene. In the foreground, a bright yellow umbrella is open on the sand, and a red bucket is tipped over next to it. The background shows a calm blue lake with two white buoys, and a distant shoreline with trees under a clear sky.

**808,544** CONTACTS WERE MADE BY PAF  
PROFESSIONAL STAFF ON BEHALF OF PATIENTS  
TO RELEVANT STAKEHOLDERS IN ORDER TO BRING  
RESOLUTION TO HEALTHCARE ACCESS ISSUES,  
UP **44%** FROM LAST YEAR.

# Direct Patient Services Division

## OUR COMMITMENT TO SERVICE

FY 2009/2010

### Direct Patient Services Division Summary

New Case Count	46,890
Total Email Contacts for Direct Patient Services	17,295
Total Patient Case Count	64,185
Total Contacts for Case Resolution	808,544

Patient Advocate Foundation has been helping patients solve their insurance and health access problems through our Direct Patient Services Division for over 14 years. Services have been provided by our professional case management staff, the Co-Pay Relief (CPR) staff and the Med CareLine staff. Case management was and continues to be PAF's main core competency with Co-Pay Relief emerging as a second core competency in 2004. When PAF opened its doors in 1996, there were 157 patients served. In FY 2009/2010, Patient Advocate Foundation was able to serve 64,185 patients, all while remaining true to the mission.

### MISSION STATEMENT

Patient Advocate Foundation was established in 1996 as a national 501(c)3 organization with a mission of *"safeguarding patients through effective mediation assuring access to care, maintenance of employment and preservation of their financial stability."* PAF serves as an active liaison between patients and their insurer, employer and/or creditors to resolve insurance, job retention, and/or debt crisis matters relative to their diagnosis through case managers, doctors and health care attorneys.

For FY 2009/2010, the Direct Patient Services Division is reporting that there were 808,544 contacts on behalf of patients to the stakeholders necessary to resolve their healthcare access issues. This averages 12.59 contacts from a PAF professional case manager or from a co-pay relief specialist. These contacts are made to a patient's healthcare provider, social workers, governmental agencies, other non-profit social service and healthcare organizations, employer representatives, creditors, insurance companies and others who may be able to bring resolution to the patient issues for every patient served.

# Direct Patient Services Division

## PAF'S DIRECT SERVICES PROVIDED DAILY TO PATIENTS AT NO COST INCLUDE:

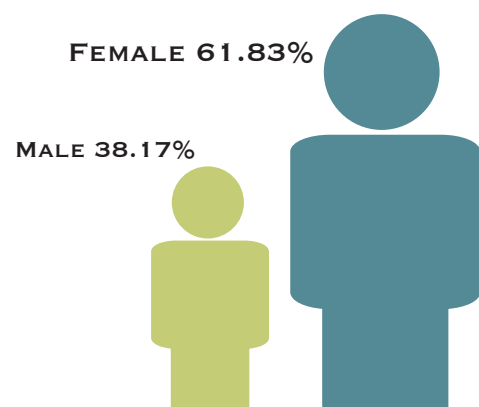
- Negotiating pre-authorization approvals
- Providing assistance in expediting the appeals process
- Coordinating benefits
- Negotiating resolutions to coding and billing errors
- Providing assistance in expediting applications for SSDI, enrollment in Medicare, Medicaid, SCHIPS, and other social programs
- Resolving debt crisis related to diagnosis
- Mediating insurance appeals
- Negotiating access to pharmaceuticals agents, chemotherapy, medical device and surgical procedures
- Brokering resources to supplement the limits of insurance and to assure access to care for uninsured
- Resolving insurance issues in the public and private sectors
- Providing Co-payment assistance to medically and financially qualified individuals

## OUR CORE COMPETENCY

Through the process of assisting patients with their access to care issues, our professional Case Management staff captures 241 fields of data on each patient that is representative of the unique patient issues that are being resolved by our staff. From this data, PAF authors and publishes the **Patient Data Analysis Report (PDAR)** annually. The PDAR demonstrates the populations being served as well as the patient access trends that are present in the current healthcare environment. Data from the **Patient Data Analysis Report** has been mirrored in the context of this FY 2009/2010 Annual Report, reflecting the patient experience from July 1, 2009 to June 30, 2010. Data is presented in graphical form in an effort to clearly define who PAF is serving, what the needs of the patients are and what resolutions have been brought to these issues.

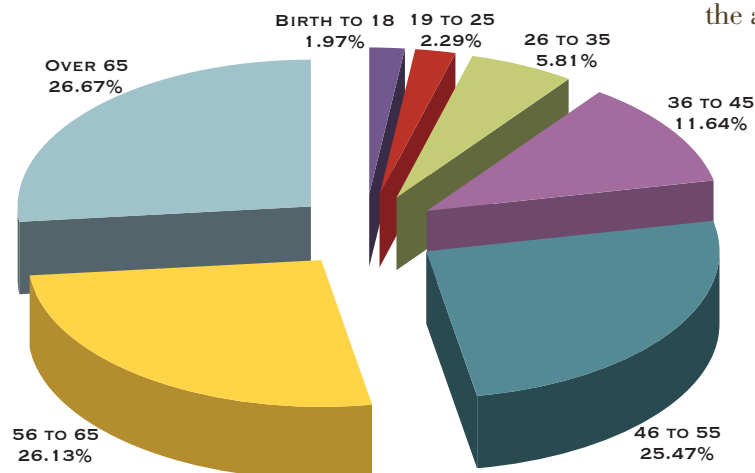
In FY 2009/2010, 61.83% of the patients served were female while 38.17 % were male, demonstrating a less than 1% increase in the male population over last fiscal year. Our male population has steadily increased year after year beginning in FY 2003/2004 when 34% of our patients were male. This increase can be attributed to the opening of our Co-Pay Relief program in 2004 with the inclusion of a prostate cancer silo as well as our partnership with the Lance Armstrong Foundation.

### GENDER BREAKDOWN OF PAF PATIENTS IN FY09/10



# Direct Patient Services Division

## AGE BREAKDOWN OF PAF PATIENTS IN FY09/10



PAF served patients of all ages with 4.26% being in the birth to 25 age range, 17.45% were aged 26-45, and over half, 51.6%, of the PAF patients were between the ages of 46 and 65 years old. Patients who are over age 65 represented 26.67% of the PAF patient population in FY 2009/2010. The number of patients aged 65 or older increased 11.44% this fiscal year. The PAF **Senior Services Division**, was created in 2004 in response to the creation of Medicare Part D. The goal is to educate and assist patients with Medicare, insurance, debt crisis and access to care issues. A member of the Senior Services Division works one on one with a beneficiary. They also attend local and national outreach involving the Centers for Medicare and Medicaid Services (CMS) and its beneficiaries and as a result are asked throughout the year to review coverage and marketing material for the Medicare health care plans.

## CASE MANAGERS ASSIGNED TO THE SENIOR SERVICES DIVISION PARTICIPATED IN THE FOLLOWING OUTREACH EVENTS:

- Local community resource event with the Virginia Oncology Associates offices and their transplant patients
- Hats Off to Caregivers, local Virginia event to honor caregivers and nursing staff (Committee chair and volunteer)
- Attended monthly meetings with the Peninsula Task Force on Aging. (120 members and growing)
- Attended and maintained a booth event with the Ferguson Community Aging Forum at Christopher Newport University, Newport News, VA
- Attended the CMS Part D Symposium in Baltimore, MD
- Attended the CMS NMEP Public and nonprofit education meeting in Washington D.C.

## SENIOR SERVICES STAFF ALSO PARTICIPATED IN THE FOLLOWING MEDIA EVENTS WITH DIRECT PATIENT ASSISTANCE OR COMMENT TO MEDICARE:

- Report on Chronic disease and Special Needs plans in a joint effort with National Patient Advocate Foundation (NPAF) to CMS
- Submitted comments to CMS on the proposed rule of revision of Medicare Advantage plans and the Part D benefits
- Participated in comment for the Henry Kaiser Family Foundation article involving Special Needs Plans
- Submitted comments on the Medicare call letter in a joint effort with NPAF to CMS
- Participated in a NBC "Date Line" Documentary involving one of our disabled patients involving access to clinical trials

## SOME OF THE PATIENTS ASSISTED THROUGH SENIOR SERVICES STATE:

*"Thank you for your time and wiliness to help others in need"*

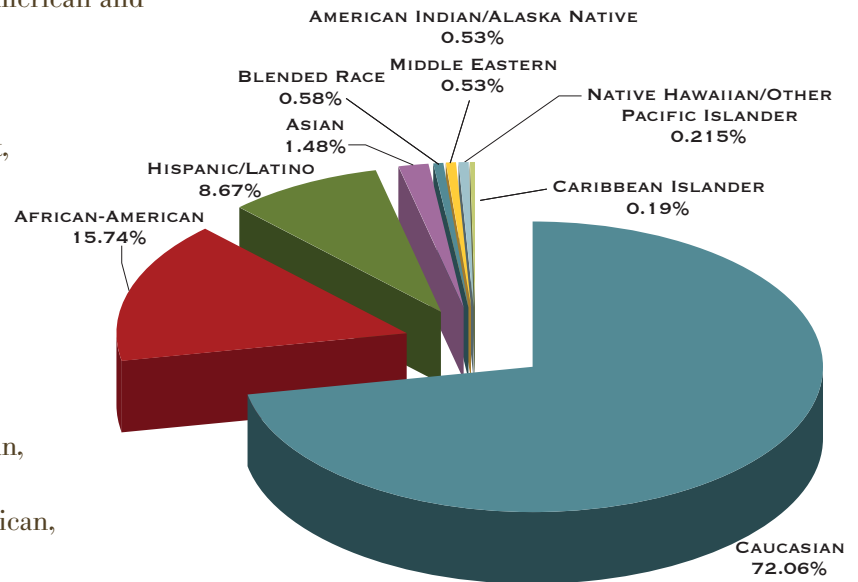
*"I think you were sent our way as a form of an angel because that is what you are to us.  
We were so very blessed to have come in contact with a human as sweet as you".*



# Direct Patient Services Division

PAF assisted patients of many ethnicities with 72.06% of patients classifying themselves as White/Caucasian, 15.74% considered themselves black or African American and 8.67% were Hispanic/Latino. We saw a 1.54% increase and 0.25% increase in the White/Caucasian and Hispanic/Latino populations respectively this year over last, while seeing a decrease in the African American population of 1.71%. The racial demographics of the PAF patient population are largely consistent with the statistics presented in the Census Bureau's 2008 American Community Survey that reported the US Population as being 74% White American, 15.1% Hispanic or Latino of any race, 12.3% Black American, 4.4% Asian American, 0.8% American Indian and Alaska Native, 0.1% Native Hawaiian or other Pacific Islander, 5.8% some other race and 2.2% two or more races. PAF has two well established disparate outreach programs that are effective in offering culturally sensitive education and direct assistance to patients from both the African American community and the Spanish speaking communities.

## ETHNICITY BREAKDOWN



The **National African American Outreach Program (NAAOP)** is designed to make more African Americans across the US aware of the case management services provided by PAF. NAAOP seeks to reduce healthcare disparities and assist individuals in obtaining a better quality of life. In FY 2009/2010, NAAOP participated in 116 local, regional and national events, reaching over 30,500 individuals. Dr. Mary T. Christian, NAAOP consultant, former Virginia Delegate and a PAF Honorary Board member has been a speaker at events such as the NAACP Annual Conference in New York with over 15,000 attendees as well as the Intergenerational Conference in San Francisco, CA. NAAOP members also attended the Sickle Cell Association Annual Convention in Orlando, FL, the Virginia Black Expo in Virginia Beach, VA and the African American Men's Health Forum held in Hampton, VA.

## PATIENTS ASSISTED BY NAAOP HAD THIS TO SAY:

*"I am very pleased to have had Vonya as my caseworker who is so polite, prompt & professional. She patiently heard my case as I asked many questions and right away contacted the insurance company within the same day. Thank you again Vonya (I don't know what I would have done without you)"*

*"You all are so great. I thank all of you for your help that you have given me. I just want you to know how hard it would be if it wasn't for good people like you all. Thank you so very, very much"*

# Direct Patient Services Division

## NATIONAL HISPANIC/LATINO OUTREACH PROGRAM

The **National Hispanic/Latino Outreach Program (NHLOP)** wrote and translated into Spanish a new “A Greater Understanding...” publication. The new publication “*Su Bienestar, una guía Para La Comunidad Hispanica/Latina*” (*Your Well-Being, A Health Guide for the Hispanic/Latina Community*), is a health guide specific to health concerns in the Hispanic/Latino population in the United States. Several months of research was conducted in order to accurately address major health concerns in the publication.

The NHLOP team has also been, throughout the year, conducting educational presentations in partnership with the Leukemia & Lymphoma Society’s National Educational Programs. Another educational program, hosted at Gilda’s Club in New York City “Insurance Matters” specific to the Hispanic/Latino population, also received great feedback from its attendees. Participants in both events immediately contacted PAF for information regarding healthcare legislation and showed interest in volunteering in their specific localities. Many reached out to PAF for case management assistance.

A case manager in our San Diego Office attended the Regional Cancer Resource Center event which focused on rural minority health in the underserved regions in the State of California. Additionally, Wanda Febus, NHLOP Director, conducted a webinar with over 250 current Avon Foundation partnership members. In total, NHLOP case managers attended 97 outreach events in the States of California and New York with a total of 250 individual contacts and distribution of over 300 Spanish publications in these States. At the national level, NHLOP conducted 512 outreach events with over 2,000 attendees and distribution of over 500 Spanish PAF publications. They have also participated in a total of 4 conferences including the Latina Symposium and the Hispanic Medical Associations 14th Annual Conference in Washington, D.C.

## EARLY DETECTION AND SURVIVORSHIP OF CANCER IN THE UNDERSERVED POPULATION

In 2009, PAF was awarded a second five year Cooperative Agreement with the Centers for Disease Control, the **Early Detection and Survivorship of Cancer in the Underserved Population (SCUP)**. Now in year two, the goals of SCUP are to increase survivorship of cancer and enhance the quality of life in the underserved population by providing direct case management services to patients with breast, cervical, ovarian, colorectal, prostate and skin cancers. PAF provides outreach and education to increase awareness of our services available to the uninsured, underinsured, minority and disparate populations.

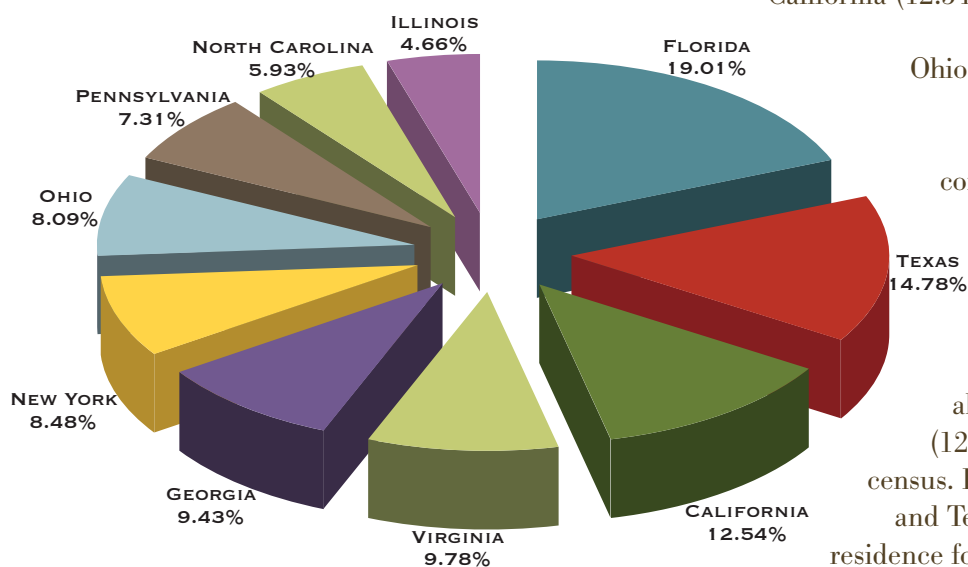
In FY 2009/2010 PAF assisted 3,927 patients through SCUP who requested assistance to access treatment and care for their disease, medication, application assistance for public benefits and resolving debt crisis issues. Two new publications were specifically created for one of the targeted populations during the fiscal year. *Promoting a Healthier American Indian and Alaska Native Community* was written by the PAF Publications Committee and *Your Well-Being, A Health Guide for the Hispanic/Latina Community* was written and translated by the PAF NHLOP team for the SCUP grant.

The CDC promoted webinars throughout the year to educate the Program Directors for state Comprehensive Cancer Control Programs across the United States. The August and September webinars were presented as a Lunch and Learn and featured PAF. This gave PAF the opportunity to let the Program Directors learn about the services available to patients. This resulted in direct requests from North Dakota state programs for future webinars specifically for them.

Conferences attended were the National Indian Health Board Conference, Washington, DC, the 32nd Annual Breast Cancer Symposium Conference and the CDC National Comprehensive Cancer Control Leadership Institute meeting in Los Angeles, CA. PAF has exceeded its goals and objectives under this grant and will continue to support the efforts of education and outreach to the underserved population.

# Direct Patient Services Division

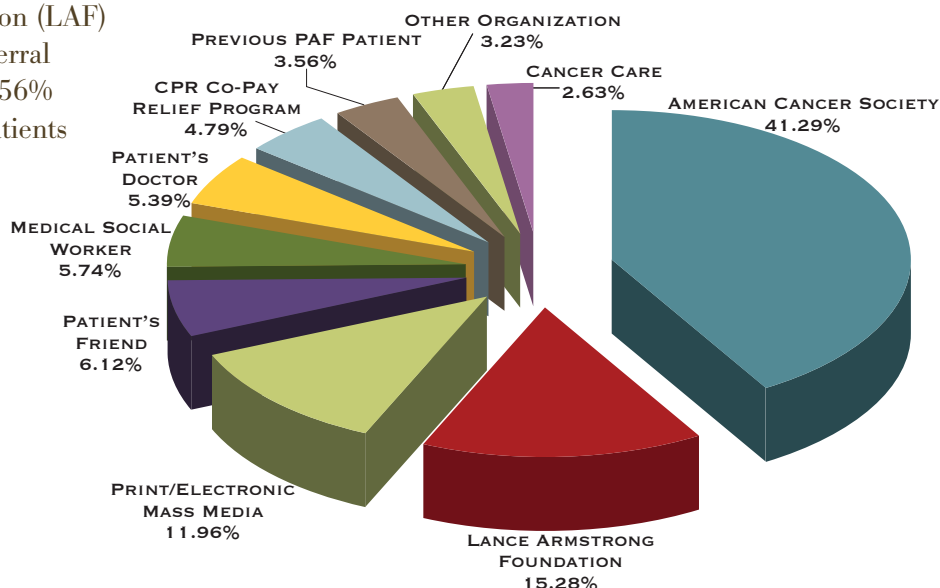
## TOP TEN REFERRAL STATES



The top ten states that the patients came from in FY 2009/2010 were Florida (17.70%), Texas (14.93%), California (12.54%), Virginia (9.78%), Georgia (9.43%), New York (8.48%), Ohio (8.09%), Pennsylvania (7.31%), North Carolina (5.93%) and Illinois (4.66%). When comparing the states from which the patient cases originated to the states, based on population density, that top the United States Census Bureau's 2009 estimates, all ten states listed above are among the top twelve (12) states, by population, per the census. During FY 2009/2010, Florida and Texas remained the top states of residence for PAF patients. California and Virginia ranked third last year, with California moving into a solo third place this year followed by Virginia in fourth. New Jersey had been 10th last year but was replaced by Illinois as number 10 this year at 4.66%.

Patients learn about PAF and its services in many ways. Over our 14 year history PAF has become a trusted source for the provision of direct patient assistance for non-profit social service and healthcare organizations, governmental agencies, members of the United States Congress, providers' offices, clinics, hospitals and media outlets. In FY 2009/2010 the American Cancer Society (ACS) is the top referral source to the PAF Direct Patient Services team (41.29%) with Lance Armstrong Foundation (LAF) as the second most common referral source (15.28%) representing a 56% increase over FY 2008/2009. Patients also learn about PAF and our services from media outlets, friends and family, healthcare providers including social workers and physicians, as well as patients who have been previously served by PAF. These sources, along with ACS and LAF are among the top ten referral sources for PAF patients.

## TOP TEN REFERRAL SOURCES



# Direct Patient Services Division



In FY 2009/2010 Patient Advocate Foundation completed the second year of its partnership with the **American Cancer Society**. The goal of the partnership is to ensure that cancer patients are able to access affordable care and pharmaceuticals and are provided case management services to resolve their insurance and job retention issues related to their diagnosis. Patients are referred to PAF by the ACS

call center located in Austin, TX and by ACS affiliate chapters throughout the United States via telephone or through a dedicated secure web-based ACS patient referral portal.

During FY 2009/2010 PAF provided direct case management services to 4,483 patients through the ACS/PAF Partnership program. The top three issues of the patients referred to PAF through the ACS/PAF Partnership were:

- Uninsured Issues 33.42%
- Debt Crisis Issues 21.45%
- Insurance Issues 14.62%

Case managers in the Partnership were able to obtain debt relief for ACS patients during FY 2009/2010 in the amount of \$9,117,368.15.

Additionally, another 3,193 patients who were referred by ACS were served through other PAF programs including both of the PAF/CDC Cooperative Agreement programs (SCUP and HemOnc), the Virginia Cares for the Uninsured Program (VCUP) and the Med CareLine. We were pleased to provide direct case management services to 7,686 patients that were referred to PAF by ACS this fiscal year.

PAF presented two webinar training sessions to the national ACS Navigator Team, educating them to the services provided to patients by PAF and how we interface with ACS to ease the referral process for patients. In return, the ACS Navigator Team Supervisors presented a webinar educating the PAF team on ACS Services. Mary L. from Illinois who was assisted by the ACS/PAF Partnership writes:

*"My PAF case manager became my advocate and friend. Your expertise, encouragement, dedication, and confidence, calmed my fears and helped me to develop patience to continue. This time, however, I had a partner, the Patient Advocate Foundation, who understood my frustrations and who had the knowledge, wisdom, and insight into how to deal with my situation. You and your organization were so helpful to me. Thanks to your efforts, my billing issue was resolved to my complete satisfaction."*



# Direct Patient Services Division

## L I V E S T R O N G<sup>®</sup>

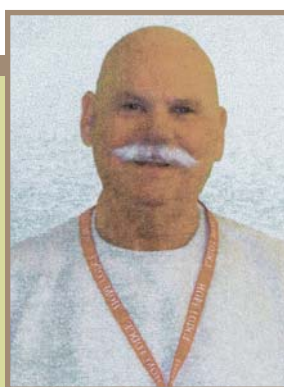
PAF celebrated its sixth year of partnership with the Lance Armstrong Foundation (LAF) and the LAF LiveSTRONG SurvivorCare (LSSC) program in FY 2009/2010. National marketing and expansion of the LiveSTRONG project has remained and continues to be a high priority continuing in FY 2010/2011.

### PROGRAM HIGHLIGHTS INCLUDE:

- PAF provided direct case management services to 3,029 patients referred by the LSSC program
- PAF continues to serve on the LSSC National Hispanic Outreach Advisory Board to assist with all aspects of the LSSC National Hispanic/Latino initiative
- LSSC partners continued collaboration monthly, sharing resources, program services, patient feedback and survey results, highlighting partner successes on behalf of patients who have been served through LSSC
- Implemented a warm call transfer option for LAF patients being referred from the LSSC call center directly to the PAF case management team
- PAF began to distribute LSSC brochures through the PAF national disparities outreach programs including our National African American Outreach Program and the National Hispanic/Latino Outreach Program

SINCE 2004, PAF HAS SERVED 11,609 PATIENTS THROUGH THE LSSC PARTNERSHIP.

A PATIENT ASSISTED BY PAF AS A PARTNER IN THE LSSC PROGRAM SAID:



#### STEPHEN JEBBO

BRAIN CANCER  
SALINA, KS

*“The people we spoke with by phone were very helpful, interesting in our concerns and encouraging. PAF would follow up with us or we with them to get our issues resolved.*

*When one is going through the labyrinth of cancer diagnosis, treatments, medications, appointments, bills and daily life, PAF was a lighthouse in the storm, a guide in the maze of confusion; your encouragement and compassion were invaluable.”*

# Direct Patient Services Division



CANCER  
TREATMENT  
CENTERS  
OF AMERICA®

In FY 2009/2010, PAF entered into a contractual partnership agreement with the **Cancer Treatment Centers of America (CTCA)** to provide sustained case management services to patients who

are seeking care at CTCA medical facilities and are experiencing access to care issues. These include obstacles due to insurance issues, inability to afford their out-of-pocket expenses and/or travel related issues. Through the partnership, these clients are referred directly to PAF for assistance. The program has a dedicated 1-800 phone line, secure provider referral portal and dedicated case management staff.

The partnership was launched in March 2010 and through the first four months assisted 223 CTCA patients. The CTCA case management staff has been successful in obtaining \$89,576 in medical debt relief since the program became operational.

IN FY 2009/2010, PAF WAS FEATURED BY NUMEROUS TIER ONE MEDIA OUTLETS, INCLUDING:

- Associated Press
- CNN
- The Wall Street Journal
- The Washington Post
- Marketwatch
- MSNBC
- AARP The Magazine
- MSN.com
- CBS News
- USA Today
- Smart Money Magazine
- Dateline NBC
- The New York Times
- The Hartford Courant
- Men's Health Magazine

PAF was also featured in tier two media outlets and websites, magazines, trade publications and television making earned media coverage the third highest referral source in FY 2009/2010 at 11.96%. Additionally, referrals from patient's friends, doctors, medical social workers, Cancer Care, many other Patient Advocacy Organizations, PAF's Co-Pay Relief Program and patients previously served by PAF round out the top ten referral sources for FY 2009/2010.

AP

CNN

THE WALL STREET JOURNAL

The Washington Post

MarketWatch

MSNBC

AARP

msn

CBS NEWS

USA TODAY

Smart Money

DATeline

The New York Times

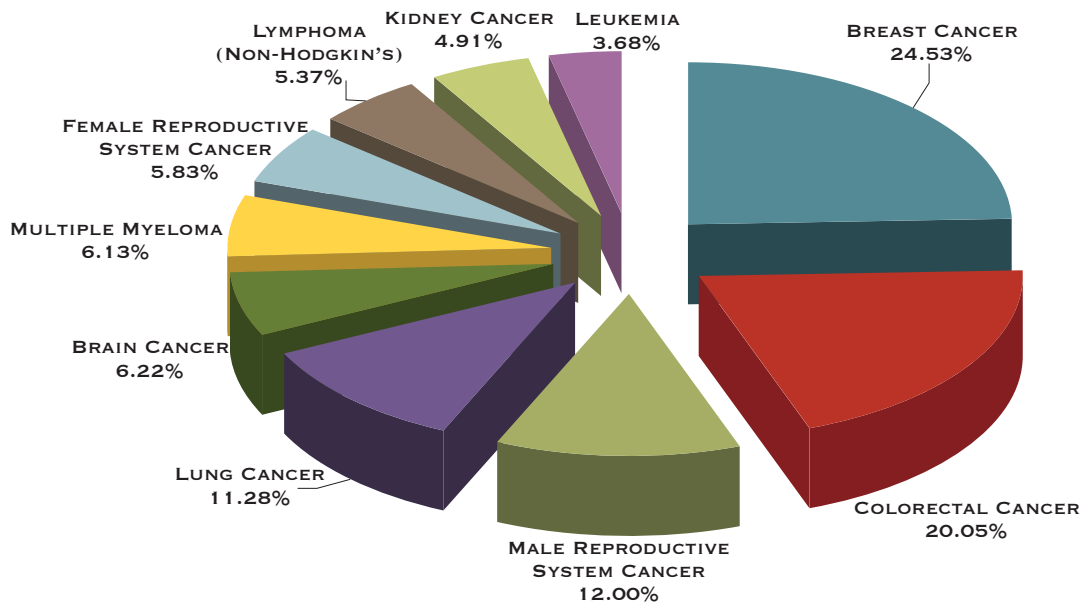
Hartford Courant

Men's Health

ПРАВИЛЬНЫЙ ЖУРНАЛ ДЛЯ МУЖЧИН

# Direct Patient Services Division

## TOP TEN CANCER DIAGNOSES REPORTED BY PAF PATIENTS IN FY09/10



### FEMALE REPRODUCTIVE SYSTEM CANCERS INCLUDE:

- FALLOPIAN TUBE CANCER
- CERVICAL CANCER
- OVARIAN CANCER
- PADGETT'S DISEASE
- UTERINE CANCER
- VAGINAL CANCER
- VULVA CANCER

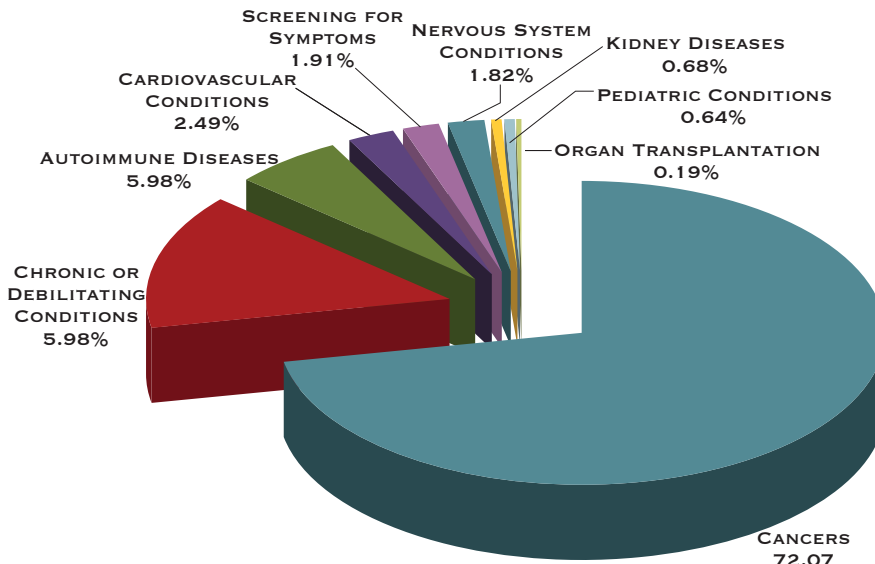
### MALE REPRODUCTIVE SYSTEM CANCERS INCLUDE:

- PROSTATE CANCER
- PENILE CANCER
- TESTICULAR CANCER

Cancer continues to be the primary diagnosis of PAF patients with 72.07% of all patients served reporting a diagnosis of cancer, representing a 4.14% decrease from FY 2008/2009. Breast Cancer remained the leading cancer diagnosis again this year at 24.53%, but was an almost 12% decrease from last year. Colorectal Cancer was the second highest reported cancer at 20.05%, a 0.21% increase over last year. Male Reproductive System Cancers increased by almost 2% (from 10.77% in FY 2008/2009 to 12%) moving it to the third highest followed by Lung Cancer representing 11.28% of our patients. Brain Cancer increased almost 80% this year over last (6.22% vs. 3.44%) and Multiple Myeloma was a new cancer diagnosis being reported in the top ten cancers this year at 6.13%. Diagnoses of Female Reproductive Cancers (5.83%, an increase from 3.56%), Lymphoma (5.37%), and Leukemia (3.68%) round out the list with the addition of Kidney Cancer being reported by 4.91% of our patients, again a new cancer diagnosis to the top ten. Ovarian Cancer and Rectal Cancer which had been included last year were no longer one of the top cancer diagnosis reported by PAF patients in FY 2009/2010.

# Direct Patient Services Division

## DIAGNOSES REPORTED BY PAF PATIENTS IN FY09/10



While cancer is the number one diagnosis of PAF patients, PAF is an inclusive advocacy organization and has provided direct patient support to people who have been diagnosed with various other chronic, life threatening and/or debilitating illnesses. The remainder of the top ten diagnoses of PAF patients for FY 2009/2010 includes Chronic/Debilitating Conditions of which there are over 60 (14.21%) an increase of 27% over last year, Auto Immune Diseases (5.98%), a 58% increase over last year, Cardiovascular Conditions (2.49%), Screening for Symptoms (1.91%), Nervous System Conditions (1.82%), Kidney Related Diseases (0.68%) , Pediatric Conditions (0.64%) and Organ Transplantation (0.19%).

In FY 2009/2010, PAF completed the third year of a second five year cooperative agreement from the Department of Health and Human Services Centers for Disease Control and Prevention (CDC). The **Hematologic Cancer Education and Outreach Program (HemOnc)** is designed to assist in determining the effectiveness of current educational materials available for hematologic cancer patients, with a focus on individuals who may be underserved, uninsured or racial/ethnic minority, and to identify areas where there may be opportunities to collaborate with other partners to improve future publications. *Lighting the Way, A Practical Guide to Clinical Trials*, published in 2009, is being translated in Spanish this fiscal year. Additionally *A Greater Understanding: Your Guide To Clinical Trials* was written to compliment *Lighting the Way*.

## Chronic or Debilitating Conditions

Addison's Disease  
Adrenal insufficiency  
ALS (Lou Gehrig's Disease)  
Amputations  
Amyloidosis  
Anemia  
Aplastic Anemia  
Asthma  
Blindness  
Blood Disorder  
Bronchitis  
Cirrhosis  
Clotting Disorder  
Connective Tissue Disorders  
COPD (Lung disease)  
Cushings Syndrome  
Degenerative Disc Disease  
Degenerative Joint Disease  
Devic's Disease  
Diabetes  
Emphysema  
Encephalopathy  
FAP(Familial adenomatous polyposis)  
Fibromyalgia  
Gauchers' Disease  
Glaucoma  
Hemochromatosis  
Hemophilia  
Hepatitis  
Hereditary Hemorrhagic Telangiectasis  
Histiocytosis  
HIV/AIDS  
Huntington's Disease  
Hyper/Hypo Thyroidism  
Hypogammaglobulinemia  
Hypopituitarism  
Immune Deficiency Disorder  
Infectious Disease  
ITP(Idiopathic Thrombocytopenic purpurs)  
Leukodystrophy  
Liver Failure  
Lymphedema  
Macular Degeneration  
Meningitis  
Muscular Dystrophy  
Myelofibrosis  
Neuropathy  
Osteomyelitis  
Osteomyelacia  
Osteonecrosis  
Osteoporosis  
Pancreatitis  
Paralysis (any body part)  
Peripheral Neuropathy  
Polio  
Polycythemia Vera  
Protein Deficiency  
Pseudomyxoma Peritonei (PMP)  
Pulmonary Emboli  
Pulmonary Fibrosis  
PXE (Pseudoxanthoma Elasticum)  
Short Bowel Syndrome  
Thrombocytopenia  
Thyroid Disorder  
TTP  
Ulcerative Colitis



# Direct Patient Services Division

During FY 2009/2010 PAF served a total of 1,296 blood cancer patients with an average of 324 patients served quarterly through the HemOnc program. This program includes a disparities outreach component, targeting African American and Hispanic/Latino hematologic cancer patients, and the organizations and healthcare facilities that serve those populations. States visited during this fiscal year include:

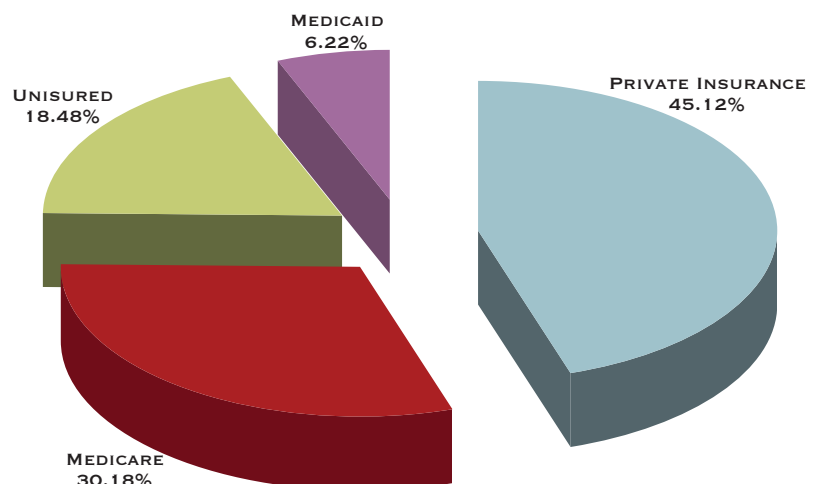
- Texas
- Utah
- Missouri
- Alabama
- Virginia
- Nevada
- Arizona
- Kansas
- Mississippi
- Iowa
- Maine
- California
- Florida

Outreach swings to specific states targeted Research Hospitals, clinics (both radiation and chemotherapy), physician's offices, and community advocates to educate them. Members of the HemOnc staff attended the Association of Pediatric Hematology Oncology Nurses (APHON) conference, the National Comprehensive Cancer Network (NCCN) annual conference, Oncology Nursing Society (ONS) annual conference, Association of Oncology Social Workers conference, American Society of Clinical Oncologists (ASCO) conference and the American Society of Pediatric Hem/Onc (ASPHO) conference.

Of the 1,296 patients served under the Hem/Onc program in FY 2009/2010, 76.23% had some form of insurance. 40.46% served by PAF were covered by private insurance, 11.43% were covered by Medicaid and 23.03% were covered under Medicare. This data represents a 1.44% decrease in the Medicare patients and a 3.85% increase in Medicaid patients served this fiscal year versus last. These statistics also showed 23.77% of all PAF patients served through the HemOnc patients reported no insurance coverage for their healthcare needs.

Globally, in FY 2009/2010, 81.52% of the patients assisted had some form of insurance whether it be Commercial/Private Insurance (45.12%), Medicare (30.18%), a 23% increase over FY 2008/2009 or Medicaid (6.22%). The number of uninsured patients decreased by 21% (from 22.46% to 18.48%) during this fiscal year. **The Virginia Cares Uninsured Program (VCUP)** is a program that was implemented in 2007 and aims to assist uninsured or underinsured Virginians, through free sustained direct case management services, who have been diagnosed with a chronic, debilitating, or life-threatening illness and are experiencing access to health care issues.

**INSURANCE COVERAGE  
REPORTED BY  
PAF PATIENTS IN  
FY 09/10**



# Direct Patient Services Division



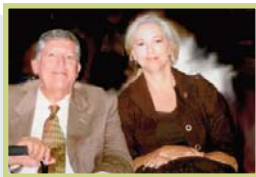
During FY 2009/2010, VCUP successfully resolved 1,444 patient cases through direct arbitration, mediation, and negotiation by the VCUP case management staff. Recognizing the many issues that surround medical debt, the VCUP case management team was able to negotiate \$1,552,885.60 worth of debt relief on behalf of Virginians served during FY 09/10. This debt relief was accomplished through negotiations with debt collectors, charitable contributions from state and local agencies, co-pay program assistance, and/or charity write-offs through medical facilities/doctor offices.

There are currently over a million residents that are uninsured throughout the state of Virginia, which makes the outreach component of this program vital to its success. VCUP staff members attend outreach events on a continuous basis incorporating health fairs, swings to health service agencies, and community events in an effort to promote the program and provide information to prospective Virginians that may benefit from VCUP offerings. From 07/01/2009 through 06/30/2010, the VCUP case management team attended 213 outreach events including:

- The Minority Health Coalition Free Clinic Day in Norfolk, VA
- The CBS sponsored Health Fair in Richmond, VA
- The 2010 National Rural Health Summit in Danville, VA

Additionally, VCUP launched a yearlong outreach and marketing campaign in June of 2010. This state-wide initiative will reach Virginians through radio announcements, billboard and newspaper advertisements and personal outreach visits by members of our case management team.

## TWO OF THE PATIENTS SERVED BY VCUP HAD THIS TO SAY:



**L. LOER**  
NORFOLK, VA

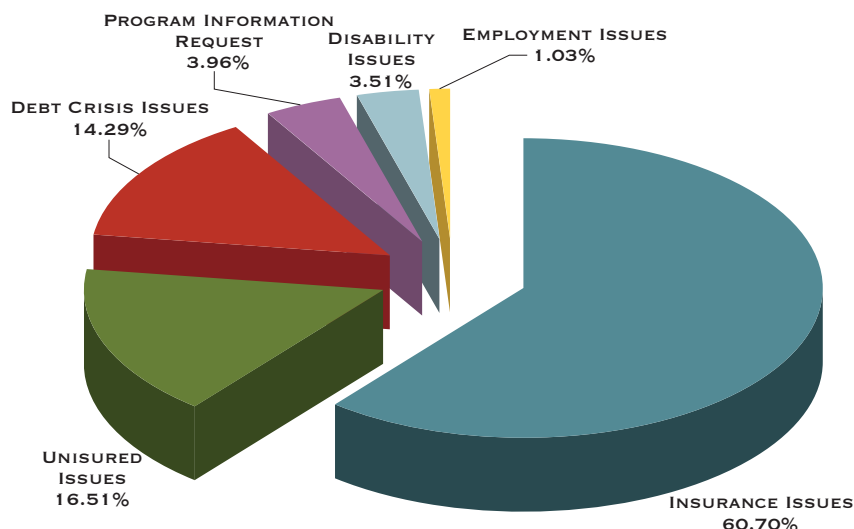
*"We have had excellent experiences with your organization. They immediately go to work and in our case, stayed on the phone until everything was resolved. PAF has been a real help to us in this very difficult time."*

**TRACEY SCHWARTZ**  
HAMPTON, VA

*"I had exhausted myself in fighting this issue (not to mention the cancer, which is supposed to kill me within 6 months), and it was a tremendous comfort to me to know that someone else would pick up that burden on my behalf. Thank you so much. With this treatment, I fully intent to outlive my prognosis!!!"*

# Direct Patient Services Division

## ISSUES FOR PAF PATIENTS IN FY09/10



### THOSE PATIENTS WHO WERE UNINSURED HAD THE FOLLOWING ISSUES IN FY 2009/2010:

- NO ACCESS TO CARE
- NO ACCESS/NO COVERAGE FOR PRESCRIPTION NEEDS
- UNPAID MEDICAL BILLS
- DENIED TREATMENT/INABILITY TO MEET UPFRONT COSTS
- NO ACCESS TO SCREENING
- MEDICAID APPLICATION ASSISTANCE NEEDED
- INSURANCE COVERAGE LOST OR TERMINATED
- NON-PERMANENT RESIDENT
- DENIED MEDICAID
- NO ACCESS TO DURABLE MEDICAL EQUIPMENT (DME)

### INSURANCE ISSUES INCLUDED

- CO-PAYMENT/PREMIUM/DEDUCTIBLE ASSISTANCE
- GENERAL BENEFIT QUESTIONS
- CLAIMS DENIED AS NOT MEDICALLY NECESSARY
- CODING AND BILLING ERRORS
- CLAIMS DENIED DUE TO EXPERIMENTAL/ INVESTIGATIONAL
- BENEFIT EXCLUSION
- ASSISTANCE WITH FACILITATING SECOND OPINION
- QUESTIONS ON COBRA
- ELIGIBILITY/ENROLLMENT/EXTENSION
- MEDICARE PART D PLAN EDUCATION/ ENROLLMENT/COVERAGE ISSUES
- DENIED/OFF FORMULARY.

Patients contact PAF for assistance for a wide variety of issues and needs. These patients are assigned to the case manager that can best meet those needs and achieve resolution. In FY 2009/2010 the primary issues patients were seeking assistance with included Insurance Issues (60.70%), Uninsured Issues (16.51%) a decrease of 18%, Debt Crisis Issues (14.29%) an 11% increase over FY 2008/2009, Program Information Request (3.96%), Disability Issues (3.51%) and Employment Issues (1.03%). PAF patients requesting assistance with Insurance Issues included co-payment/premium/deductible assistance for both privately insured patients and those covered by Medicare Part D, general benefit questions, claims denied as not medically necessary, coding and billing errors, claims denied due to experimental/investigational, benefit exclusion, assistance with facilitating second opinion, questions on COBRA eligibility/enrollment/extension, Medicare Part D plan education/enrollment/coverage issues, and denied/off formulary.

# Direct Patient Services Division

Patient Advocate Foundation has two specialized programs within Direct Patient Services that are designed to address specific needs to defined populations. These programs include the Med CareLine and the Co-Pay Relief (CPR) program.

## **MEDCARE***line* Access to Emerging Medication Therapies

In November 2006, PAF launched the **Med CareLine Division**, a patient/provider hotline, designed to provide sustained assistance to patients nationwide who have been diagnosed with a specific illness and are seeking educational resources, direct assistance with access to care issues, and /or financial aid for select patient needs. The launch of the Med CareLine division was the first time that Patient Advocate Foundation partnered clinical specialists with patients who were seeking access to emerging treatments and therapies.

## **COLORECTAL** *CareLine*

The first program in the Med CareLine Division, the **Colorectal CareLine (CCL)** has been serving patients since 2006. We are pleased to report that FY 2009/2010 saw the Colorectal CareLine staff serving 2,562 patients with clinical case management services. Since the launch of CCL in November 2006, nearly 10,000 Colorectal Cancer Patients have accessed the CCL clinical case management services.

The Colorectal CareLine continues to administer the CCL Financial Aid Fund, a small grant program designed specifically for colorectal cancer patients in need of debt crisis assistance for expenses related to out of town care. The CCL Financial Aid Fund currently provides one-time grants to eligible patients who have a diagnosis of colorectal cancer and since inception has assisted 4,063 patients.

The Colorectal CareLine staff exhibited and/or presented at the Oncology Nursing Society (ONS) 35th Annual Conference in San Diego, CA, the American Society of Clinical Oncology (ASCO) 46th annual meeting in Chicago, IL, and at the Patient Advocate Foundation's 11th Annual Patient Congress held in Washington, D.C. in the Educational Expo for all attendees. The Colorectal CareLine also provided program materials for the Colon Cancer Alliance Quarterly meetings in Philadelphia, PA, New York, NY, Tampa, FL and Salt Lake City, UT, and presented at a John Hopkins Weekly Luncheon.

CCL staff has been successful in bringing medical debt relief to the colorectal cancer patients we have served in the amount of \$614,239.75 for FY 2009/2010. PAF has obtained \$3,433,633.73 in total medical debt relief on behalf of colorectal cancer patients since the inception of the program. The Colorectal CareLine is supported by Amgen Oncology, sanofi-aventis and Genentech.



**JAMES CANTRELL**  
STAGE II COLON CANCER  
DYERSBURG, TN

*"The medicine being available is a miracle since we had no way to purchase it. She gave us the advice on how to get gas and food. We were so desperate for care and so very glad we found you."*



# Direct Patient Services Division



In February 2010, PAF launched the **Chemo-Induced Nausea and Vomiting (CINV) CareLine**, the second program in the Med CareLine Division. In accordance with the mission of the Med Care Division, the CINV CareLine provides sustained clinical case management assistance to patients experiencing nausea and vomiting as a side effect of chemotherapy treatments. Referrals to the line are being provided by field representatives, generated by a national press release as well as PAF case management staff screening cancer patients for program eligibility. The program has a dedicated 1-800 phone line and website.

Since the program inception in February 2010, the team has assisted 27 patients suffering with CINV and has been successful in obtaining \$36,350 in medical debt relief on behalf of these patients. The CINV CareLine is supported by ProStrakan.

## PATIENT ADVOCATE FOUNDATION **CO-PAY RELIEF** *A Patient Assistance Program*

Patient Advocate Foundation's **Co-Pay Relief (CPR)** Program has successfully completed 6 years of operation and continues to be one of the two core competency based programs at PAF. The program was established in April 2004 to provide direct financial support to insured patients, to include Medicare beneficiaries, who qualify medically and financially with their pharmaceutical co-payments.

In FY 2009/2010, the CPR program expanded its patient support by opening one new disease fund, Cutaneous T-Cell Lymphoma as well as expanding the covered diagnoses in the Autoimmune Disorders silo, to include Ankylosing Spondylitis and Plaque Psoriasis. The Co-Pay Relief Program also was successful in expanding available funding through the generous donations of existing and new partners in the following established silos:

- Autoimmune Disorders
- Chemo Induced Anemia/  
Chemo Induced Neutropenia (CIA/CIN)
- Lung Cancer
- Multiple Myeloma
- Myelodysplastic Syndrome (MDS)
- Osteoporosis
- Prostate Cancer
- Rheumatoid Arthritis

These additions expanded our available co-pay support disease categories to 20 in FY 2009/2010. The CPR program assisted patients with the following diagnoses during the past FY:

- Autoimmune Disorders
- Breast Cancer
- Chemo Induced Anemia and  
Chemo Induced Neutropenia
- Chronic Pain
- Colon Cancer
- Diabetes
- Head and Neck Cancer
- Hepatitis C
- Kidney Cancer
- Lung Cancer
- Lymphoma
- Malignant Brain Tumor
- Myelodysplastic Syndrome
- Multiple Myeloma
- Osteoporosis
- Pancreatic Cancer
- Prostate Cancer
- Rheumatoid Arthritis
- Sarcoma
- Cutaneous T-Cell Lymphoma

# Direct Patient Services Division

## FY 2009/2010 CPR patient impact and operational enhancements included:

- PAF's CPR program served 11,161 patients this fiscal year, a 52.7% increase from FY08/09 when CPR served 7,310 patients. PAF saw a 96% increase in funding support this year over FY 2008/2009
- The CPR Program has continued to be recognized as #1 across the United States by Practice Administrators for superior patient service and ease of program use.
- The CPR program successfully completed its annual program audit in January 2010 with no exceptions noted.
- The CPR program implemented an upgraded Automatic Call Distribution system (ACD) in November 2009. This technology enhancement has made a positive impact in the service that the CPR program provides to all callers. The system allows all calls to be completed upon initial contact with the program and provides continuous updated information to the patients and providers regarding the availability of each disease category.
- CPR expanded the financial eligibility guidelines for patients seeking assistance from the CPR program to 500% of the Federal Poverty Level (FPL) effective April 1, 2010. This significant program modification has made a positive impact in expanding the patient access to the CPR program. CPR successfully developed and deployed our own custom database solution in January 2010 which has significantly enhanced the efficiency of the CPR operations.
- As of June 2010, the CPR program now accepts applications through the secured provider/pharmacy portal **-24 Hours a Day** - <https://cprproviders.patientadvocate.org>
- Created and widely distributed a quick reference guide that provides step by step instructions on how providers can complete the on line registration process for the secure CPR application portal as well as steps to use the portal to complete the patient application process.
- Deployed enhancements to the secure provider/pharmacy portal including functionality that allows providers to apply on behalf of multiple patients in one session, providing up to 48 hours to download and print the applications as is convenient, as well as a patient look up feature.
- Launched the "Monday Message" communication strategy to the thousands of providers and pharmacies registered with the CPR program providing up to date program availability information as well as program enhancements.

**ALBA HALE**  
RHEUMATOID ARTHRITIS  
MIAMI, FL



*"This is the first time I have become a member of the Co-Pay Relief "family" and this far I can say I find this to be a very professional, organized foundation of which I am privileged to be a part of. In these uncertain times it is very helpful to find a group that is willing to provide hope and financial help to those who are eligible due to medical expenses and financial distress. Thank you for all your help."*

# Direct Patient Services Division

The CPR program has successfully completed 6 years of operations providing co-payment assistance to a total of 36,284 patients, awarding over \$96 million in copayment assistance since inception, April 2004. Patient Advocate Foundation would like to thank the following donors for their sustained commitment and financial support of the Co-Pay Relief program in FY 2009/2010:

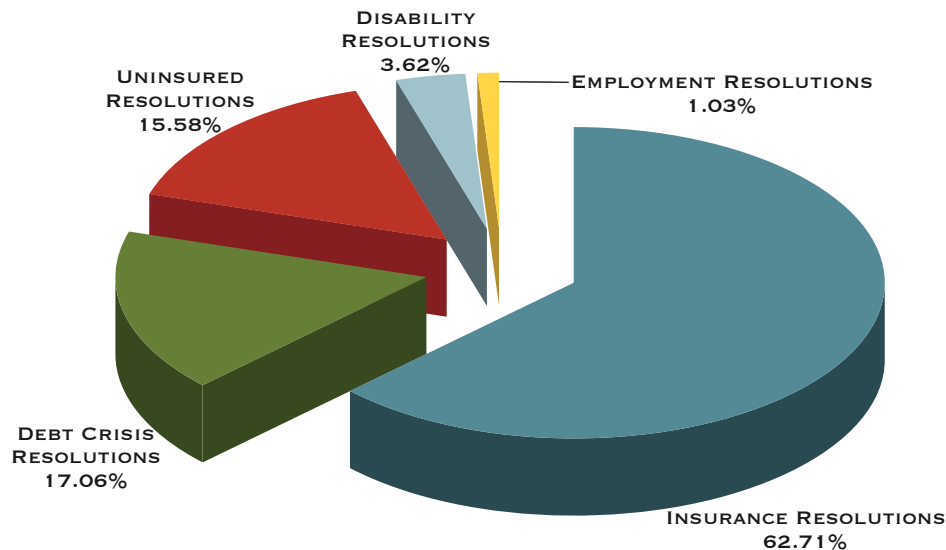


**TERRI LACOUR**  
ST. AUGUSTINE, FL

*"The Patient Advocate Foundation was truly a blessing for me as a young, fifty year old woman. They were instrumental in acquiring all the proper documents to help me through this journey. It has been a trying time for me and my family. Thank you and God bless all of you!"*

# Direct Patient Services Division

## RESOLUTIONS FOR PAF PATIENTS IN FY09/10



### DEBT CRISIS RESOLUTIONS INCLUDE:

- TRANSPORTATION ASSISTANCE
- OFFSET COSTS THROUGH ALTERNATIVE ASSISTANCE
- RENTAL/MORTGAGE PAYMENT RELIEF
- UTILITY/PHONE RELIEF
- FOOD ASSISTANCE
- FINANCIAL COUNSELING PROVIDED
- FACILITATED/LOCATED NEEDED SUPPLIES

### INSURANCE RESOLUTIONS INCLUDE:

- FACILITATED/OBTAINED CO-PAY, PREMIUM AND/OR DEDUCTIBLE ASSISTANCE
- EDUCATED ON GENERAL BENEFIT QUESTIONS
- FACILITATED/OBTAINED CHARITY CARE FOR UNDERINSURED
- MEDIATED APPEALS PROCESS/SUCCESSFULLY OVERTURNED DENIAL
- ENROLLED INTO MEDICARE EXTRA HELP/COST SHARE
- ENROLLED INTO PHARMACEUTICAL INDIGENT DRUG PROGRAM
- RESOLVED MEDICARE PART D COVERAGE ISSUES
- INTERPRETED SECOND OPINION VIA PLAN LANGUAGE

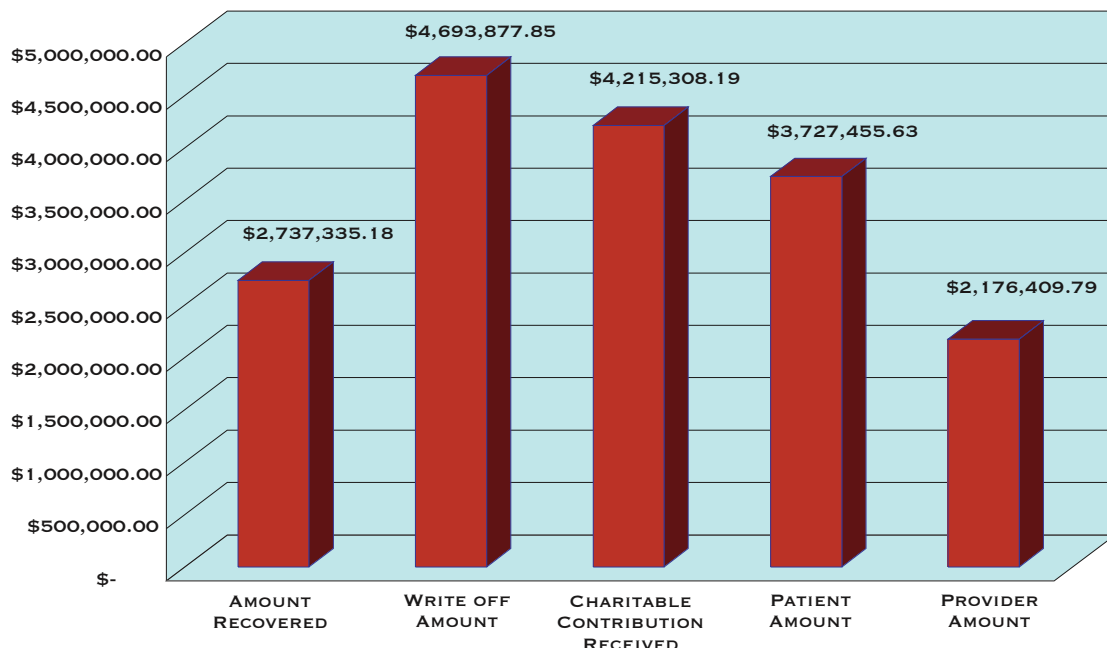
Each day, our professional staff members work with patients to achieve resolution to their issues. As demand continues to increase, the resources available continue to decrease, challenging our staff to be more creative and persistent when identifying resolutions to the issues our patients face. The economy is still playing a role in the lives of our patients as many of them lose insurance coverage due to their companies either dropping coverage or closing their doors. In spite of all of these obstacles, our team of professional case managers and call counselors has been successful in finding resolutions to our patient's issues. In FY 2009/2010 the top category of resolutions achieved by our staff on behalf of the patients were Insurance Resolutions (62.71%), a 6% increase over last fiscal year. Insurance resolutions include obtaining co-payment, deductible and premium assistance for patients, educating on general benefits, obtaining charity care for the underinsured, mediating the appeals process, enrolling patients into Medicare and/or Medicaid, facilitating access to free drugs through manufacturer sponsored programs, resolving Medicare Part D coverage issues, and reconciling coding and billing errors.



# Direct Patient Services Division

Debt Crisis Resolutions was the second largest category of resolutions (17.06%) moving from third last year, a 9% increase. Debt crisis resolutions on behalf of patients included transportation assistance, the offset of costs through alternative assistance, rental/mortgage payment relief, utility/phone relief, food assistance and locating needed medical supplies. Uninsured Resolutions accounted for 15.58% of the resolved cases followed by Disability Resolutions (3.62%) and Employment Resolutions (1.03%)

PAF was able to obtain a considerable amount of debt relief for patients in FY 2009/2010. The value of the reported debt relief equaled \$17,550,386.64, a 40% increase over last year. It is important to note that it is likely that the financial impact our staff has on the lives of patients is far greater over time than presented here as this reported debt relief of \$17 million is only the financial relief that is reported to case managers and/or recovered during the course of our work with an open case and does not capture long term impact. The debt relief breakdown is:



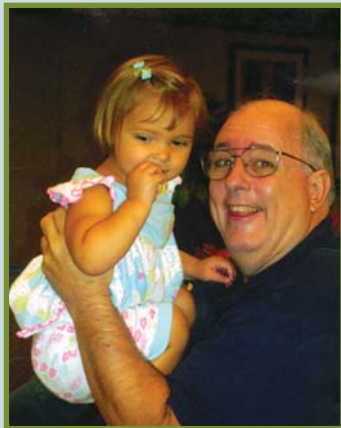
## DEBT CRISIS RESOLUTIONS

- Amount Recovered: the amount PAF recovered from third party payers such as commercial insurance plans and Medicaid or Medicare programs.
- Write Off Amount: the amount of patient debt relief obtained by PAF through negotiations with facilities and/or medical providers.
- Charitable Contributions: the amount PAF secured on behalf of patients through utilization of national and/or local charitable resources such as hospital charity care programs, non-profit financial aid programs and/or local faith or disease based programs.
- Patient Amount: the amount directly returned to patients as a result of PAF negotiating reimbursement for out of pocket medical expenses.
- Provider Amount: the amount directly returned to providers as a result of PAF negotiating reimbursement for medical debt that had been previously written off or logged by the facility as “uncollected”.

# Direct Patient Services Division

## CONCLUSION

While we are energized by the passage of sweeping healthcare reform, the Affordable Care Act (ACA) passed in 2010, we are equally concerned by the practical impact that the implementation of ACA will have on our nation's most vulnerable populations which is yet to be well defined. PAF believes that our services will be depended upon even more in the coming years and we stand ready, committed to supporting those that cannot do it for themselves. Committed to the sister, brother, mother, father, grandmother, grandfather, aunt, uncle, daughter, son, or friend who is faced with a life threatening diagnosis and is simultaneously burdened with inadequate access to and coverage for their care. We will remain a trusted source in patient advocacy, available and ready to help patients solve their insurance and healthcare access problems as we have been doing since 1996. It is our commitment and responsibility to the nation.



### JOEL PERRY

NON-ALCOHOLIC CIRRHOSIS

JACKSONVILLE, FL

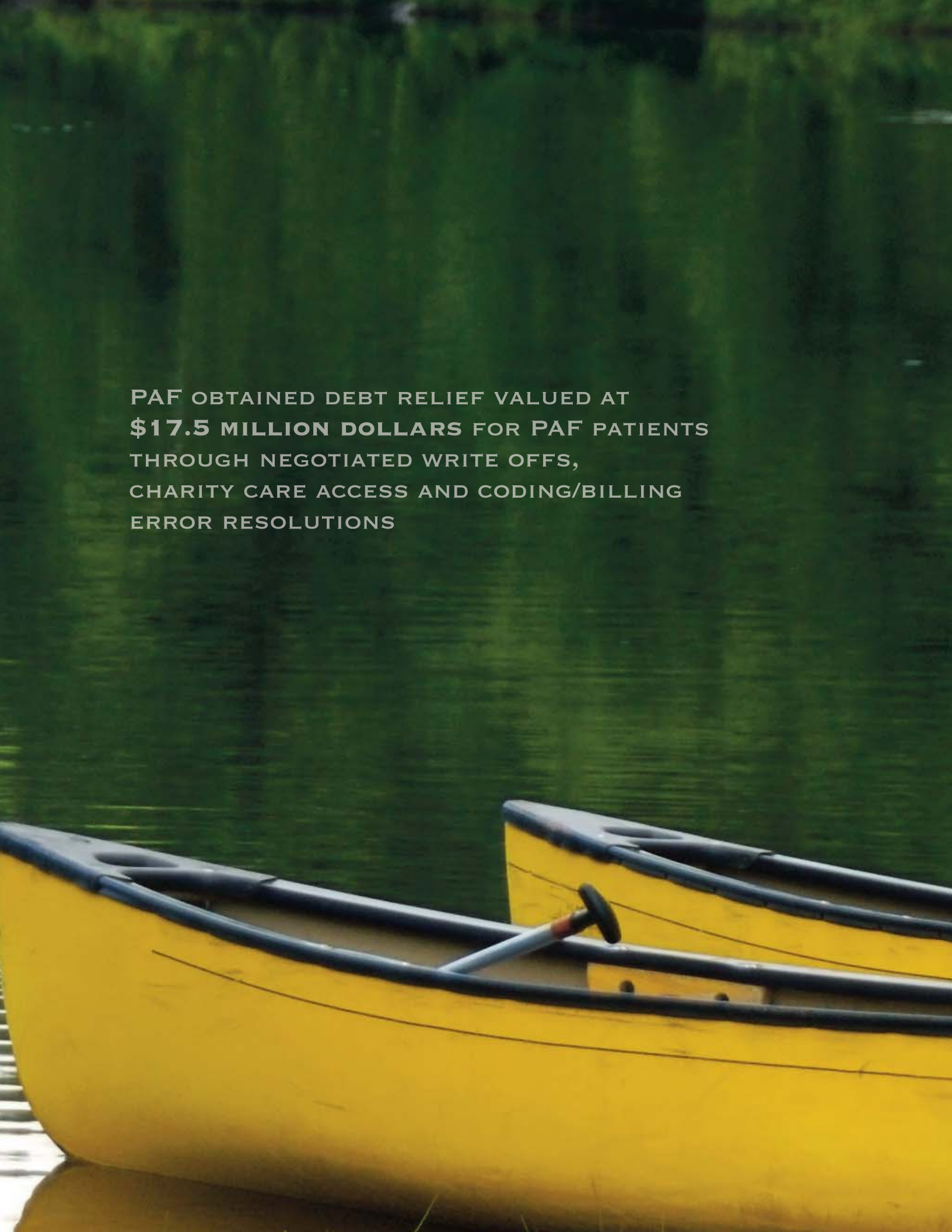
*“Exceptional! Marty is a wealth of information and resources. She facilitated conversations with multiple pharmaceutical companies- enabling these companies to pick-up most of the Rx costs-which with a transplant it is upwards of 1,000.00 per month. She is caring and concerned, so very willing to listen understand, and suggests solutions. She is a gift to us!”*

### ELSA TANNER

BREAST CANCER

LAWRENCEVILLE, GA

*“Judith Storey was wonderful in helping me get my disability and keeping my medical insurance. She fought to me when I didn't have the strength to fight. She was my advocate!”*

A yellow canoe is positioned in the foreground, partially visible, floating on a calm body of water. The water is a deep green color, reflecting the surrounding environment. In the background, there is a dense line of green trees and foliage. The overall scene is peaceful and natural.

PAF OBTAINED DEBT RELIEF VALUED AT  
**\$17.5 MILLION DOLLARS** FOR PAF PATIENTS  
THROUGH NEGOTIATED WRITE OFFS,  
CHARITY CARE ACCESS AND CODING/BILLING  
ERROR RESOLUTIONS

# 11th Annual Patient Congress

## June 29-30, 2010



ATTENDEES HELEN PATASHNICK –VERMONT, ROSEMARY ALLEN-ARKANSAS, AND FRANK LUZZO-IDAHO DISCUSS THE ISSUES DURING THE CAPITOL HILL BRIEFING

Patient Advocate Foundation entered a second decade of hosting its Annual Patient Congress in Washington, DC this year. The 11th Annual Patient Congress was held on June 29-30, 2010 and attracted more than 150 patients, family member advocates, physicians, nurses and social workers – representing all 50 states and the District of Columbia. There was a heightened enthusiasm this year as the historic Patient Protection and Affordable Care Act legislation had passed in Congress in March 2010. Attendees learned how to use their voice to continue to educate legislators on what the patient experience is in the health care system and how the new legislation would provide benefits to those patients.

### **PATIENT CONGRESS ATTENDEES PARTICIPATED A CAPITOL HILL BRIEFING WHERE THEY HEARD FROM A PANEL CONSISTING OF:**

- Elizabeth Fowler, JD, PhD-Senior Counsel to the Chair and Chief Health Counsel, Senate Finance Committee
- Debbie Curtis-Chief of Staff to Congressman Pete Stark (D-13th-CA)
- Chuck Clapton, JD-Health Policy Director, Senate Health, Education, Labor and Pensions Committee
- Mark Hayes, JD, PharmD-Health Policy Director and Chief Health Counsel, Senate Finance Committee for Ranking Member Senator Charles Grassley (R-IA)





HOUSE OF REPRESENTATIVES MEMBER, THE HONORABLE JOHN DINGELL (D-15TH-MI) ADDRESSES PATIENT CONGRESS ATTENDEES AT THE CAPITOL HILL BRIEFING.



OUR CAPITOL HILL BRIEFING PANELISTS, ELIZABETH FOWLER, JD, PHD-SENIOR COUNSEL TO THE CHAIR AND CHIEF HEALTH COUNSEL, SENATE FINANCE COMMITTEE; DEBBIE CURTIS-CHIEF OF STAFF TO CONGRESSMAN PETE STARK (D-13TH-CA); CHUCK CLAPTON, JD-HEALTH POLICY DIRECTOR, SENATE HEALTH, EDUCATION, LABOR AND PENSIONS COMMITTEE; AND MARK HAYES, JD, PHARM D-HEALTH POLICY DIRECTOR AND CHIEF HEALTH COUNSEL, SENATE FINANCE COMMITTEE FOR RANKING MEMBER SENATOR CHARLES GRASSLEY (R-IA).

Christopher Kush, MPP, CEO of Soapbox Consulting instructed attendees on how to have an effective Hill Visit and educated the attendees on the main issues for discussion with the elected officials.

**The issues included:**

- A permanent solution to the Medicare physician reimbursement formula
- Support for the “Medical Bankruptcy Fairness Act” and the “Health Insurance Rate Authority Act”
- To provide a comprehensive definition of out-of-pocket spending within the newly created Health Insurance Exchanges

*“My son and I had a wonderful time attending the 11th annual Patient Congress. It gave us an empowered feeling to be gathered with others, working toward the same goal of achieving better attention to the plight of the serious and/or chronically ill.”*



ATTENDEES GETTING TO KNOW ONE ANOTHER DURING THE WELCOME RECEPTION AND EDUCATIONAL EXPO.



ATTENDEES VISIT WITH OUR EXHIBITORS DURING THE WELCOME RECEPTION AND EDUCATIONAL EXPO.

That evening, attendees had the opportunity to attend a Welcome Reception and Educational Expo. Representatives from the patient advocacy community and representatives from voluntary health care organizations and agencies were available to visit with attendees and to provide educational information.

**Exhibitors included:**

American Psychological Association  
 American Society of Therapeutic Radiation Oncology (ASTRO)  
 Breast Cancer Network of Strength  
 BreastCancer Trials.org  
 C3: Colorectal Cancer Coalition  
 Cancer Support Community  
 Colon Cancer Alliance  
 Colorectal CareLine  
 Co-Pay Relief Program  
 Imerman Angels  
 International Myeloma Foundation  
 Kidney Cancer Association  
 Lance Armstrong Foundation  
 Legal Information Network for Cancer (LINC)

Lung Cancer Alliance  
 Men's Health Network  
 National Alliance for Hispanic Health  
 National Cervical Cancer Coalition  
 National Coalition for Cancer Survivorship  
 National Patient Advocate Foundation  
 Oncology Nursing Society  
 Ovarian Cancer National Alliance  
 Pancreatic Cancer Action Network  
 Patient Advocate Foundation  
 Prevent Cancer Foundation  
 Sarah Lawrence College Health Advocacy Program  
 The Cholangiocarcinoma Foundation  
 Walden University – College of Health Services  
 Woman and Cancer Magazine



SENATOR MAX BAUCUS (D-MT) WITH NANCY DAVENPORT-ENNIS, PAF CEO AND FELLOW ATTENDEES.



THE HONORABLE JOHN YARMUTH (D-3RD-KY) AND PATIENT CONGRESS ATTENDEE AND CONSTITUENT NICHOLAS HARPER DISCUSS THE NEWLY PASSED AFFORDABLE CARE ACT.



PATIENT CONGRESS DINNER SYMPOSIUM KEYNOTE SPEAKER VICTORIA REGGIE KENNEDY ADDRESSES OUR ATTENDEES AND TALKS ABOUT HER LATE HUSBAND, SENATOR TED KENNEDY, AND HIS PASSION FOR HEALTHCARE REFORM.



MARK STEPHENS WITH CONGRESSMAN TOM PRICE (R-6TH-GA)



ROBERT YOULE, ESQ., CHAIR BOARD OF DIRECTORS, AMERICAN CANCER SOCIETY ACCEPTS THE NATIONAL HUMANITARIAN HEALTHCARE AWARD ON BEHALF OF THE AMERICAN CANCER SOCIETY AND THE AMERICAN CANCER SOCIETY CANCER ACTION NETWORK.

On day two of the conference, Patient Congress participants, prepared by the Capitol Hill Briefing, conducted personal visits with their Members of Congress from both the US House of Representatives and the US Senate. The Patient Congress attendees completed 189 meetings with Members of Congress and staff on Capitol Hill, including 100 Senate offices and 89 House offices. Seventy-five of the meetings were with the member themselves.

During the Dinner Symposium held Thursday evening, the Honorable Joe Courtney (D-2nd-CT), United States House of Representatives and the Honorable Allyson Schwartz (D-13th-PA), United States House of Representatives were presented with the 2010 Healthcare Hero Award for their steadfast commitment to the Affordable Care Act. We also recognized the American Cancer Society and the American Cancer Society Cancer Action Network with The National Humanitarian Healthcare Award, the highest award presented by PAF/NPAF to an individual or organization.

A highlight of this year's Patient Congress Dinner Symposium was the opportunity for participants to hear from our Keynote speaker, Victoria Reggie Kennedy, wife of the late Senator Edward M. Kennedy. In her address, Mrs. Kennedy recounted how her husband worked diligently throughout his career on healthcare and how important it was to see it pass. Prior to the Dinner, Mrs. Kennedy autographed copies of the Senator Kennedy's last book, "*True Compass*" for all of our attendees. Her story of his life left our attendees inspired and energized to continue to make a difference.



# *A special thanks to the Members of the United States Congress who served as Honorary Chairs for the 11th Annual Patient Congress.*

## **PATIENT CONGRESS HONORARY CHAIRS:**

### **UNITED STATES SENATE**

Senator Arlen Specter (D-PA)  
Senator Ben Cardin (D-MD)  
Senator Ben Nelson (D-NE)  
Senator Bob Corker (R-TN)  
Senator Christopher Dodd (D-CT)  
Senator Chuck Grassley (R-IA)  
Senator Daniel Inouye (D-HI)  
Senator Kay Bailey Hutchison (R-TX)

Senator Lisa Murkowski (R-AK)  
Senator Mark Pryor (D-AK)  
Senator Lisa Murkowski (R-AK)  
Senator Mark Pryor (D-AK)  
Senator Michael Enzi (R-WY)  
Senator Richard Burr (R-NC)  
Senator Thad Cochran (R-MS)  
Senator Tim Johnson (D-SD)

### **UNITED STATES HOUSE OF REPRESENTATIVES**

Representative Adam Schiff (D-29th-CA)  
Representative André Carson (D-7th-IN)  
Representative Anna Eshoo (D-14th-CA)  
Representative Barbara Lee (D-9th-CA)  
Representative Bill Posey (R-15th-FL)  
Representative Blaine Luetkemeyer (R-9th-MO)  
Representative Bruce Braley (D-1st-IA)  
Representative Candice Miller (R-10th-MI)  
Representative Chaka Fattah (D-2nd-PA)  
Representative Charles Gonzalez (D-20th-TX)  
Representative Chris Van Hollen (R-8th-MD)  
Representative Dan Boren (D-2nd-OK)  
Representative Dave Reichert (R-8th-WA)  
Representative David Camp (R-4th-MI)  
Representative Dennis Moore (R-3rd-KA)  
Representative Doris Matsui (D-5th-CA)  
Representative Dutch Ruppersberger (D-2nd-MD)  
Representative Earl Blumenauer (D-3rd-OR)  
Representative Ed Pastor (D-4th-AZ)  
Representative Eddie Bernice Johnson (D-30th-TX)  
Representative Fred Upton (R-6th-MI)  
Representative Gene Green (D-29th-TX)  
Representative Gerry Connolly (D-11th-VA)  
Representative Ginny Brown-Waite (R-5th-FL)  
Representative Gwen Moore (D-4th-WI)  
Representative James Oberstar (D-8th-MN)  
Representative Jerry Costello (D-12th-IL)  
Representative Jim Langevin (D-2nd-RI)  
Representative Jim McDermott (D-7th-WA)  
Representative Jim Moran (D-8th-VA)  
Representative Jo Ann Emerson (R-8th-MO)  
Representative John Conyers (D-14th-MI)

Representative John Dingell (D-15th-MI)  
Representative John Lewis (D-5th-GA)  
Representative John Sarbanes (D-3rd-MD)  
Representative John Yarmuth (D-3rd-KY)  
Representative Larry Kissell (D-8th-NC)  
Representative Lois Capps (D-23rd-CA)  
Representative Loretta Sanchez (D-47th-CA)  
Representative Louise Slaughter (D-28th-NY)  
Representative Mary Bono Mack (R-45th-CA)  
Representative Mary Jo Kilroy (D-15th-OH)  
Representative Marsha Blackburn (R-7th-TN)  
Representative Maxine Waters (D-35th-CA)  
Representative Michael Michaud (D-2nd-ME)  
Representative Mike McIntyre (D-7th-NC)  
Representative Nick Rahall (D-3rd-WV)  
Representative Peter DeFazio (D-4th-OR)  
Representative Robert Wittman (R-1st-VA)  
Representative Rosa DeLauro (D-3rd-CT)  
Representative Shelley Berkley (D-1st-NV)  
Representative Steve Cohen (D-9th-TN)  
Representative Steven LaTourette (R-14th-OH)  
Representative Sue Myrick (R-9th-NC)  
Representative Tom Price, M.D. (R-6th-GA)  
Representative Yvette Clarke (D-11th-NY)  
Representative Zoe Lofgren (D-16th-CA)  
Representative Shelley Berkley (D-1st-NV)  
Representative Steve Cohen (D-9th-TN)  
Representative Steven LaTourette (R-14th-OH)  
Representative Sue Myrick (R-9th-NC)  
Representative Tom Price, M.D. (R-6th-GA)  
Representative Yvette Clarke (D-11th-NY)  
Representative Zoe Lofgren (D-16th-CA)



CHRISTIAN DOWNS, PAF BOARD PRESIDENT, CONGRESSWOMAN ALLYSON SCHWARTZ (D-13TH-PA), NANCY DAVENPORT-ENNIS, PAF CEO AND AMY WOTRING, NPAF VICE PRESIDENT OF FEDERAL GOVERNMENT AFFAIRS PRESENTING CONGRESSWOMAN SCHWARTZ WITH THE 2010 HEALTHCARE HERO AWARD.



CHRISTIAN DOWNS, PAF BOARD PRESIDENT, CONGRESSMAN JOE COURTNEY (D-2ND-CT), NANCY DAVENPORT-ENNIS, PAF CEO AND AMY WOTRING, NPAF VICE PRESIDENT OF FEDERAL GOVERNMENT AFFAIRS PRESENTING CONGRESSMAN COURTNEY WITH THE 2010 HEALTHCARE HERO AWARD.

## *A Special Thanks goes to the Ardent Supporters of the 10th Annual Patient Congress:*

- AmerisourceBergen
- Amgen Oncology
- Boehringer Ingelheim
- Cephalon
- Eli Lilly and Company
- Genentech
- GlaxoSmithKline
- Lance Armstrong Foundation
- Pfizer Oncology
- US Oncology

*"It is one thing to work to affect change writing letters, making phone calls and signing petitions – but to work to make positive change face-to-face...that is an experience everyone should have."*



AN ATTENDEE TO THE 11TH ANNUAL PATIENT CONGRESS GETTING READY FOR HER CAPITOL HILL VISITS.



# PAF SCHOLARSHIP FOR SURVIVOR'S ACADEMIC AWARD PROGRAM



THE SCHOLARSHIP FOR SURVIVORS PROGRAM WILL PROVIDE \$33,000.00 IN SCHOLARSHIP FUNDS FOR 2010-2011.

THIS YEAR'S SCHOLARSHIP FOR SURVIVOR RECIPIENTS ARE:

**THE ROBIN PRACHEL AWARD**  
**DYLAN FEIERABEND**

ATTENDING: COLLEGE OF THE REDWOODS

**THE KAREN L. REEDER AWARD**  
**KRISTOPHER ADAME**

ATTENDING: CONCORD UNIVERSITY

**THE CHERYL GRIMMEL AWARD**  
**INSUP LEE**

ATTENDING: HARVARD COLLEGE

**THE MONICA BAILES AWARD**  
**SADIE BYBOTH**

ATTENDING: LOUISIANA STATE UNIVERSITY

**THE JIM MEADE & LUKE BARLOWE AWARD**  
**NICHOLAS HARPER**

ATTENDING: BELLARMINE UNIVERSITY

**THE JOANN DAVIS AWARD**  
**NATHAN HERTZ**

ATTENDING: WICHITA STATE UNIVERSITY

**UNITED HEALTHCARE FOUNDATION**  
**MARY STIDDOM**

ATTENDING: UNIVERSITY OF TENNESSEE, MARTIN

## PAF SCHOLARSHIP FOR SURVIVORS RECIPIENTS

**TENISHA AVILA**

ATTENDING:  
FRESNO PACIFIC  
UNIVERSITY

**GREGORY JOHNSON**

ATTENDING:  
COLORADO SCHOOL OF MINES

**HUNTER DUFEE**

ATTENDING: KEENE STATE  
COLLEGE

**KAHINA LOUIS**

ATTENDING:  
UNIVERSITY OF FLORIDA



THREE OF OUR 2010/2011 SCHOLARSHIP FOR SURVIVORS RECIPIENTS: KRISTOPHER ADAME FROM WEST VIRGINIA ATTENDING CONCORD UNIVERSITY, SADIE BYBOTH FROM TEXAS ATTENDING LOUISIANA STATE UNIVERSITY AND NICHOLAS HARPER FROM KENTUCKY ATTENDING BELLARMINE UNIVERSITY.

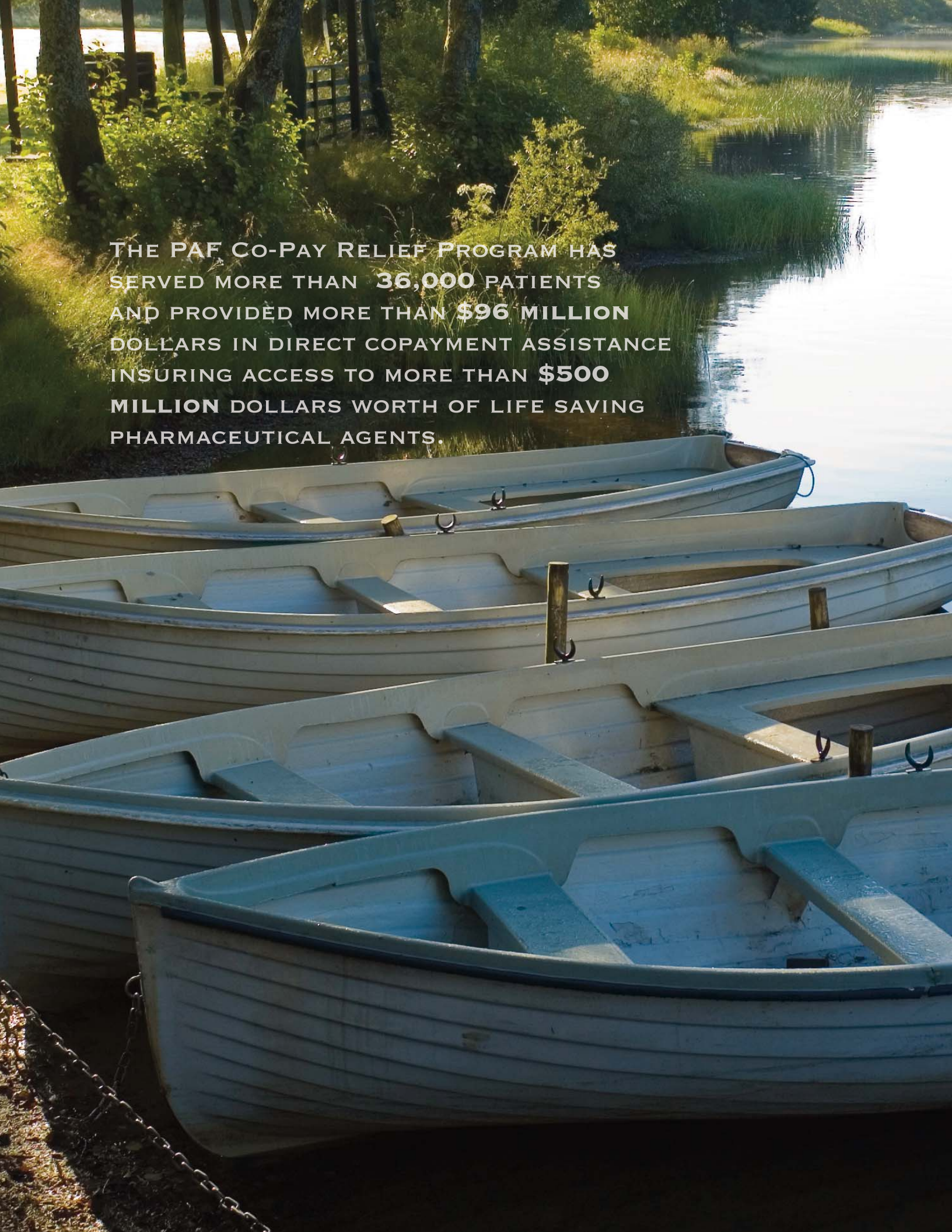
The PAF Scholarships for Survivor's Academic Award Program, founded in 2000 in honor and memory of the thousands of young adults that have had their childhoods forever changed by a diagnosis of cancer or another life threatening disease, had the distinct pleasure of honoring the recipients for the 2010-2011 Academic school year at the 11th Annual Patient Congress held in June. This year, Patient Advocate Foundation recognized Abby Schafer who completed her course of study and graduated from Marywood University with a Master's of Science in Social Work.

*"I am not sure what the future holds for me yet...Regardless of what is in store for me I am certain I will give it my all and be able to put my education to good use. I am grateful for the opportunity and knowledge I have gained throughout persuing this degree. I am grateful to you all for the work you do that has provided me with the gift of this scholarship. Thanks to you all at the Patient Advocate for helping me reach my goal and now to allow me to be able to set new ones."*

**ABBY SCHAFER,**  
**GRADUATING SENIOR,**  
**SCHOLARSHIP FOR SURVIVOR'S RECIPIENT**

Each student receives a \$3,000 scholarship annually for each year that he/she is enrolled full time in a higher education program, maintains a GPA of 3.0 or higher and completes community service hours each semester. The Scholarship for Survivors program will provide \$33,000.00 in scholarship funds for 2010-2011.



A row of four white rowing boats is docked on a calm lake. The boats are arranged in a line, with the closest one in the foreground and the others receding into the background. The water is still, reflecting the light from the sky. In the background, a dense forest of trees and bushes lines the shore, with a wooden fence visible among the trees. The overall scene is peaceful and serene.

THE PAF CO-PAY RELIEF PROGRAM HAS  
SERVED MORE THAN **36,000** PATIENTS  
AND PROVIDED MORE THAN **\$96 MILLION**  
DOLLARS IN DIRECT COPAYMENT ASSISTANCE  
INSURING ACCESS TO MORE THAN **\$500**  
MILLION DOLLARS WORTH OF LIFE SAVING  
PHARMACEUTICAL AGENTS.



9TH ANNUAL

# A Promise of Hope Affair

FEBRUARY 27, 2010

NEWPORT NEWS MARRIOTT AT CITY CENTER



JOE'S TROP ROCKERS, CONSISTING OF JOE MANISCALO, MARGARITA BILL AND SHERRI LINN ENTERTAIN DURING THE WELCOME RECEPTION

"I Love Beach Music" was just one of the melodies played at the 9th Annual *A Promise of Hope Affair* as we chased away the winter blues with a Mid-Winter Beach Party! *A Promise of Hope Affair* was held on February 27, 2010 at the Newport News Marriott at City Center. Our guests, totaling 350, arrived dressed as if for an evening at the beach or on their favorite cruise ship and included the PAF Executive, Scientific and Honorary Boards of Directors, local businesses PAF staff members and Partners in Progress ----representatives.

Joe's Trop Rockers, consisting of Joe Maniscalco, Margarita Bill and Sherri Linn entertained our guests during our Welcome Reception putting everyone in the mood with their calypso/steel drum music. During the VIP Reception, our guests were entertained by Evening Violet, which included Becca Fifelski and Tim Tessier who provided acoustical guitar and vocal entertainment.



THE EMBERS START THE EVENING OFF

Our Silent Auction had over 400 items with a fair market value of over \$57,000.00. Juliet Bickford, news reporter from PAF's local CBS affiliate, WTKR-Channel 3, served as Mistress of Ceremonies and helped us raise \$10,000.00 for PAF's Scholarship for Survivors program that night.



SHAGGING TO THE EMBERS



BIDDING AT THE SILENT AUCTION

# 9th Annual A Promise of Hope Affair



CONGRESSMAN ROB WITTMAN (R-1ST-VA) ADDRESSES THE CROWD



CONGRESSMAN ROBERT C. "BOBBY" SCOTT DELIVERS A FEW REMARKS



PAF BOARD OF DIRECTORS PRESIDENT CHRISTIAN DOWNS WELCOMES THE ATTENDEES



As our guests entered the Ballroom, they were entertained by The Embers, one of North Carolina's premier beach music bands. As an extra treat, members of the local shag dancing club, Shag N 4 U, lead by Larry and Cindy Black took over the dance floor in an exhibition of shag dancing to the sounds of The Embers. During dinner, our guests heard from Dr. John McCarty, Professor of Medicine Hematology/Oncology at VCU-Massey Cancer Center and the Medical Director of the Bone Marrow Transplantation Program at VCU Medical Center. He shared with our guests about a patient that PAF had assisted with getting a transplant case denial overturned by one of our case managers.

PAF also recognized Larri Short, our regulatory attorney who is with Arent Fox LLP in Washington DC. She was presented with the National Humanitarian Healthcare Award in recognition of her outstanding leadership and commitment to improving access to quality healthcare as a national authority in regulatory affairs. This is the highest award that PAF presents to individuals who are making a difference.

We were honored to be addressed by Congressman Robert C. "Bobby" Scott (D-3rd-VA) and Congressman Rob Wittman (R-1st-VA). Also in attendance were Virginia House of Delegates members Delegate Robin Abbott (D-93rd) and Delegate Glenn Oder (R-94th) as well as Charles Stanton from U.S. Senator Jim Webb's office (D-VA).

Through the support of local businesses, PAF Board of Directors and Partners in Progress, the 2010 A Promise of Hope Affair was able to raise over \$286,000.00 through donations, sponsorships, auction bids and in-kind donations. These funds support PAF's provision of direct services by our professional case management staff to help patients solve their insurance and healthcare access problems.



ALAN RICHARDSON, CHIEF DEVELOPMENT OPERATIONS OFFICER AND PROMISE OF HOPE AFFAIR CHAIR WITH CEO NANCY DAVENPORT-ENNIS AND CHIEF DEVELOPMENT OFFICER JACK ENNIS



# 9th Annual A Promise of Hope Affair



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BREAST CANCER  
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*"Ms. Martinez was very helpful and professional, she made me feel supported and more secure by offering extra resources that they have available. I appreciate their compassion and empathy during a very challenging time."*

# 9th Annual A Promise of Hope Affair

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**PAF EXECUTIVE ROUND TABLE MEMBERS:**

**FRONT ROW: NANCY DAVENPORT-ENNIS, PAT JOLLEY, DYNELLE LUNSFORD, ERIN MOARATTY, FRAN CASTELLOW, BETH PATTERSON**

**ON THE STAIRS: JACK ENNIS, CAREY WALDRIP, ALAN RICHARDSON, BILL NASON**

52



**SANDRA GREVE**


**ANKYLOSING SPONDYLITIS**

**PORT CHARLOTTE-FL**

*"I have had a multitude of health issues since I was 17 years of age. It started with Ulcerative Colitis. Then at 45 I developed Asthma, then pneumonia. In 2006, was diagnosed with IgA Nephropathy, this caused high blood pressure, high cholesterol and gout, in addition to RLS.*

*I am now on Coumadin now, but hope it's temporary. My latest disease is Ankylosing Spondylitis has really hit hard. I was able to stay ok with the financial debt with all my specialists and all my Rx, but some months are worse than others. My co-pay had to go onto a charge card-and also with the maintenance program every eight weeks after and then the doctor visits to take the injection adds that much more expense. The day I found out that there are medical grants to help people like me, it really gave me hope-my family and I need that. I am a very giving person and I thank god every day, so I thank you very much."*





PAF COMPLETED ITS 14TH YEAR OF  
OPERATIONS WITH REVENUES IN EXCESS  
OF **\$35.6 MILLION DOLLARS**, A **39% GROWTH**  
IN REVENUES FROM THE PRIOR FY.  
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Jennifer Fernaays  
Jennifer Lenzo  
Jennifer Obenchain  
Jennifer Spivey  
Jennifer Weese  
Joan Gore  
Joan Venticinque



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John L. & Martha Reed Murphy  
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John Scott  
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Judith Storey  
Julie Gray  
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LaQuita Durity  
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Leah Palmer  
Lee Mortenson  
Liam Murphy  
Lillian Mayer  
Linda Loyd  
Linda Shird  
Lisa Pankowski  
Lisa Shaw  
Lisa Wright  
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Lyndah Dreiling  
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Marco Loures  
Margie Griffin  
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Mark Wadley  
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Mary Altomare  
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Mary Ellen Fleegeer  
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Masaru Matsuda  
Masoud Yousefi  
Matt Skelton  
Megan Bradshaw  
Megan Falin  
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Melissa Taylor  
Metise Council-Banks  
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Michael Jordan  
Michael Kelleghan  
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Michelle Herbert  
Michelle Lira  
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Michelle Shanks  
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Nancey Tresler  
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Nansi Rivas  
Natalie McAndrew  
Nelson Bermudez  
Nina Shapiro, Esquire  
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Paul Reider  
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Rebekah Phelps  
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Rocquel Robinson  
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Ron B. Thompson  
Roshunda Chapman  
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Roy Baynes  
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Samantha Fries  
Samantha Kumar  
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Staples Center Foundation  
Stephanie Bland  
Stephen B. Canepa  
Stephen Hill  
Steve W Young  
Steven Snapinn  
Susan Capps

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Tanna Palmer  
Tara Girard  
Thomas Gantt  
Thomas Nusbickel  
Thomas Provencher  
Tia Bush  
Tina Rudolph-Smith

Tina Santiago  
Tom McCarty  
Tomas Mustelin  
Tracie Karafa  
Tracy Andrus  
Tricia Smithers  
Trisha Cochran  
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Vanessa Toro

Vicki Huxford  
Victor Fung  
Victoria Doheny  
Viola Jackson  
Ward Bailey  
Whitney Thornton  
Willie Lovett  
Yashia Clarke  
Yvonne Perlberg

## IN HONOR OF:

In Honor of Bob Keintz  
Beth D'Addono  
In Honor of Clayton Keenan  
Tandy Keenan  
In Honor of Christian Downs  
Pearl B. Moore  
In Honor of Greg Pemberton  
Tom Jones, Louretta Palmer

In Honor of Hannah Bystrom  
Thomas Lawson  
In Honor of Katie Schools  
Chris & Susan Schools  
In Honor of Richard (Rick) Crusoe  
Libby Taub, Ruth Taub  
In Honor of Tammy Neice  
Joshua Marshall

In Honor of Jon Sands  
Cort Nikolaev  
In Honor of N. Patterson  
Lance Armstrong Foundation

## IN MEMORY OF:

In Memory of Andrew Aaron  
Annalee Mauskopf  
In Memory of Anne Brosnan  
James J. McMahon  
In Memory of Arthur H. Phillips  
Calsonic Kansei  
Julie Nichols  
In Memory of Bernard Clark  
Ronald A. Vandenbussche  
In Memory of Beverly Ingham  
Vernon Ingham  
In Memory of Binks Hollowy  
Martha Smith  
In Memory of Carol Casale  
George Armitage  
In Memory of Delores Jean Wagers  
John T. Bickel, Sr.  
George Pugh  
In Memory of Donald A. Townsley  
Jane Siano

In Memory of  
Donna Marie Shepherd  
M. Craig Shepherd  
In Memory of Evelyn Hurt  
William Hurt  
In Memory of Glynn Crowder  
Julie Nichols  
In Memory of Grace Box  
Ronald Box  
In Memory of James Michael  
"Mike" Stone  
Chris Alstrin  
Costanza Agency, Inc.  
David Collins  
Jean C. Shipman  
William Shipman  
In Memory of Jeanette Whiteley  
David Whiteley  
In Memory of John Hickman  
Calsonic Kansei  
In Memory of Karen Johnson  
Emma Battle

In Memory of Larry Pint  
Inge Aldersebaes  
Scott and Vicki Brandau  
Monika Davis  
Jean Evers  
Dennis and Christine Fannin  
Home Trust & Savings Bank  
Connie and Steven Jensen  
Kolbet Realtors  
Larry and Nancy Muller  
Jim and Beth Olsen  
Dee Onken  
Lori Stern  
Geri Thompson  
Yvonne Tourtellott  
Michael and Ruth Wagner  
In Memory of Michael J. Rawski  
Karleen Rawski  
In Memory of Margret Ostrowski  
Roberta & Edward Spiegel  
In Memory of Marshall Howland  
Karen Howland

# PAF Supporters

In Memory of Mom  
Gary Brewer

In Memory of  
Morris Arthur Abrams  
Clarice Rifkin Aronowitz

In Memory of Onelia Trujillo  
Joseph & Rita Alcure  
Robert Bourque  
Janet Flores

In Memory of Rick Crusoe  
Debbie Crusoe

In Memory of Robert T. Griffith  
Jacqueline Griffith

In Memory of Robert W. Keintz  
Adrienne Gallagher  
Brenner Accounting Services  
Mary Ann & John Moore  
Mr. & Mrs. D. L. Wolle

In Memory of Steven  
Herb & Darlene Perry

In Memory of Wayne Burrows  
Gary Bauer

## PAF IN KIND SUPPORTERS

Leah Locke-Arnett  
Bruce Avery  
Dr. Alan J. Balch  
Dr. Charles Balch  
Dr. Pamela S. Becker  
Dr. Al Benson III  
Justin Boykin  
Bruce Breeger  
Dr. David Brizel  
Rene Cabral-Daniels  
Christian Downs  
Vicki J Shteir-Dunn  
Meg Gaines  
Dr. Dennis A. Gastineau  
Venus Gines

Lawrence J. Glazer  
Dawn Rose-Hicks, Multi-Tek, LLC  
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Decisions, Inc.  
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Deborah Parham Hopson  
Dr. Lovell Jones  
Paul Keddell  
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Dr. Robert M. Rifkin  
Brian Skinner  
Dr. Marc Stewart  
Jennifer Stuebbe  
Andy Tao, AJTSport Photo  
Mark Trinkle, SignMedia, Inc.  
Dr. Reed V. Tuckson  
Dr. Lori Williams  
Somer Wilson  
Nancy Witte  
Randy Yocum

## COMBINED FEDERAL CAMPAIGN

PAF is a participant in the Combined Federal Campaign (CFC) which was established by the United States government as a way for Federal employees to support their charities of choice through the use of payroll deduction. PAF's CFC number is 10681. You are also able to designate Patient Advocate Foundation with your United Way campaign. Ask your United Way representative on the correct procedure to designate PAF as it may vary from United Way to United Way.

**PAF STAFF  
DISTRIBUTED  
MORE THAN  
125,000 PIECES  
OF EDUCATIONAL  
MATERIALS  
TO PATIENTS,  
CAREGIVERS AND  
HEALTHCARE  
PROFESSIONALS  
THIS YEAR.**

# PAF Financial Statements

## *Patient Advocate Foundation*

### *Statements of Financial Position*

June 30,	2010	2009
<b>Assets</b>		
<b>Current assets</b>		
General operating cash and cash equivalents	\$ 2,688,952	\$ 2,804,701
Restricted CPR cash and cash equivalents	30,234,822	20,579,341
Unconditional promises to give	120,611	45,325
Interest receivable	70,656	73,050
Service contract receivable	240,629	116,074
Employee travel advances	1,088	-
Inventories	69,359	76,237
Prepaid expenses	260,049	75,867
Investments and cash equivalents	1,974,377	1,975,136
<b>Total current assets</b>	<b>35,660,543</b>	<b>25,745,731</b>
<b>Property and equipment - net</b>	<b>1,178,231</b>	<b>895,208</b>
<b>Other assets</b>		
Refundable deposits	114,374	15,463
	<b>\$ 36,953,148</b>	<b>\$ 26,656,402</b>
<b>Liabilities and Net Assets</b>		
<b>Current liabilities</b>		
Current portion of obligation under capital lease	\$ 63,379	\$ 58,660
Accounts payable and accrued expenses	494,944	360,238
Deferred revenue	2,407,856	1,957,297
Accrued vacation leave	378,951	313,508
<b>Total current liabilities</b>	<b>3,345,130</b>	<b>2,689,703</b>
<b>Long-term liabilities</b>		
Obligation under capital lease - less current portion	123,427	186,805
<b>Total liabilities</b>	<b>3,468,557</b>	<b>2,876,508</b>
Unrestricted	1,275,392	1,225,417
Temporarily restricted	30,234,822	20,579,341
Permanently restricted	1,974,377	1,975,136
<b>Total net assets</b>	<b>33,484,591</b>	<b>23,779,894</b>
	<b>\$ 36,953,148</b>	<b>\$ 26,656,402</b>

*The accompanying notes are an integral part of these financial statements.*

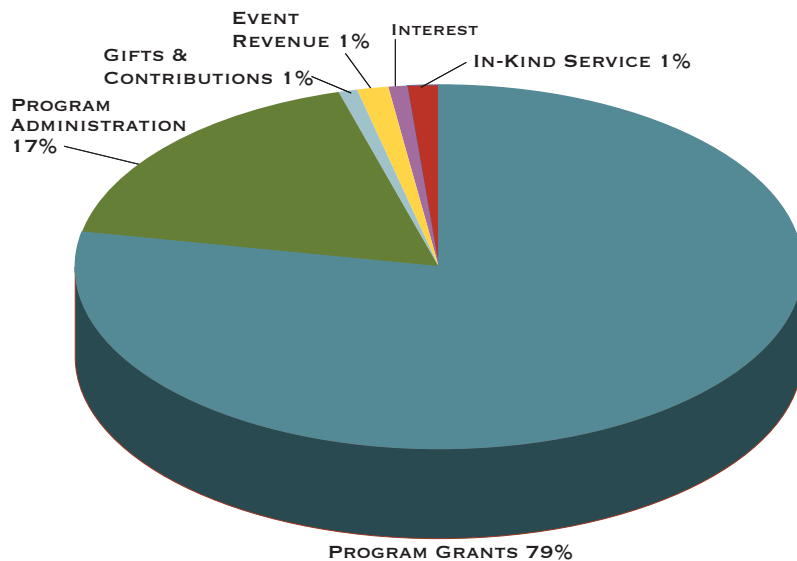
**Patient Advocate Foundation**  
**Statements of Activities**

Years Ended June 30,	2010				2009			
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>Revenues, gains and other support</b>								
Contributions								
Grants	\$ 4,676,771	\$ 23,153,996	\$ -	\$ 27,830,767	\$ 4,592,337	\$ 12,106,822	\$ -	\$ 16,699,159
Private and public donations	107,085	-	-	107,085	129,933	-	-	129,933
Donated services and materials	505,819	-	-	505,819	136,234	-	-	136,234
Program Administration	6,192,045	-	-	6,192,045	3,212,883	-	-	3,212,883
Patient Congress	207,300	-	-	207,300	204,715	-	-	204,715
Promise of Hope	231,450	-	-	231,450	267,297	-	-	267,297
Miscellaneous income	204,224	-	-	204,224	132,974	-	-	132,974
Investment income (loss)	304,091	-	(759)	303,332	490,847	-	37,653	528,500
Net assets released from restrictions								
Satisfaction of program restrictions:								
Financial Aid Awards	13,498,515	(13,498,515)	-	-	10,333,650	(10,333,650)	-	-
<b>Total revenues, gains and other support</b>	<b>25,927,300</b>	<b>9,655,481</b>	<b>(759)</b>	<b>35,582,022</b>	<b>19,500,870</b>	<b>1,773,172</b>	<b>37,653</b>	<b>21,311,695</b>
<b>Expenses</b>								
Program services								
Patient services	5,912,931	-	-	5,912,931	5,053,936	-	-	5,053,936
Co-Pay Relief	16,190,409	-	-	16,190,409	12,506,046	-	-	12,506,046
Service contracts	1,492,920	-	-	1,492,920	332,963	-	-	332,963
Supporting services:								
Management and general	1,355,571	-	-	1,355,571	862,809	-	-	862,809
Fundraising	925,494	-	-	925,494	690,682	-	-	690,682
<b>Total expenses</b>	<b>25,877,325</b>	<b>-</b>	<b>-</b>	<b>25,877,325</b>	<b>19,446,436</b>	<b>-</b>	<b>-</b>	<b>19,446,436</b>
<b>Change in net assets</b>	<b>49,975</b>	<b>9,655,481</b>	<b>(759)</b>	<b>9,704,697</b>	<b>54,434</b>	<b>1,773,172</b>	<b>37,653</b>	<b>1,865,259</b>
<b>Net assets - beginning of year</b>	<b>1,225,417</b>	<b>20,579,341</b>	<b>1,975,136</b>	<b>23,779,894</b>	<b>1,170,983</b>	<b>18,806,169</b>	<b>1,937,483</b>	<b>21,914,635</b>
<b>Net assets - end of year</b>	<b>\$ 1,275,392</b>	<b>\$ 30,234,822</b>	<b>\$ 1,974,377</b>	<b>\$ 33,484,591</b>	<b>\$ 1,225,417</b>	<b>\$ 20,579,341</b>	<b>\$ 1,975,136</b>	<b>\$ 23,779,894</b>

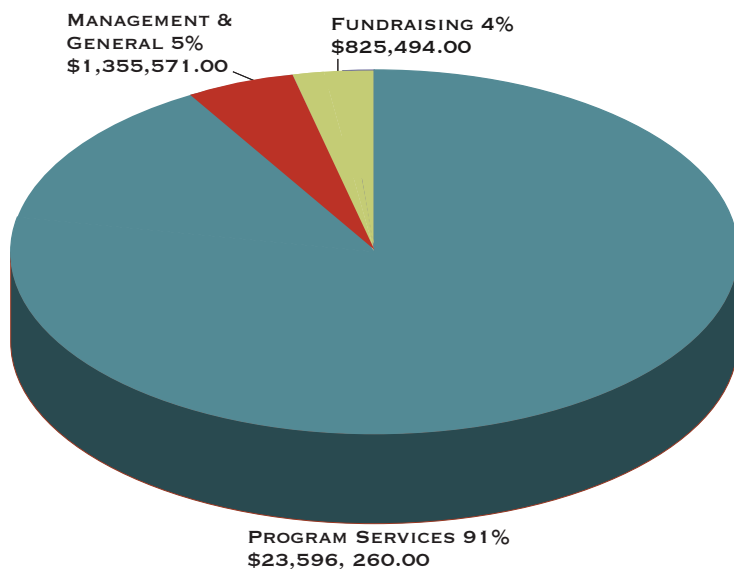
The accompanying notes are an integral part of these financial statements.



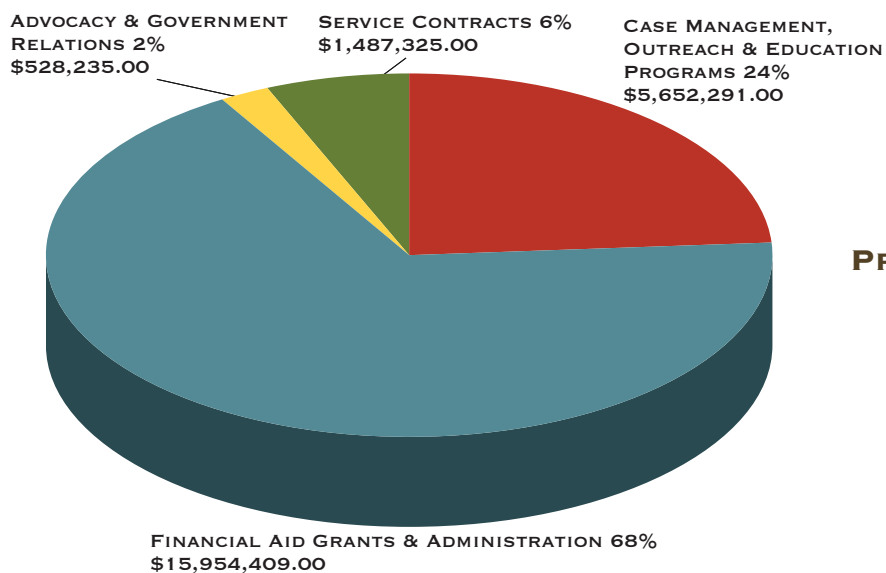
# FY2009/2010



## REVENUES



## FUNCTIONAL EXPENSES



## COMBINED PROGRAM SERVICES EXPENSES

# PAF STAFF FY 2009/2010

## EXECUTIVE LEADERSHIP

Nancy Davenport-Ennis, Chief Executive Officer  
Fran Castellow, MEd., President, Operations  
Beth Darnley, President, Mission Delivery  
William Nason, Chief Operating Officer

## ADMINISTRATIVE SUPPORT STAFF

Chanda Cox     Michelle Hayes  
Judi Roberson     Diana Hauser  
Mary Tilles     Deborah Andrus

## COMMUNICATIONS

Michael Jordan, Communications Coordinator  
Jennifer Weese  
Tricia Smithers

## CORPORATE DEVELOPMENT

John H. Ennis, Jr., Chief Development Officer  
Alan Richardson, Chief Development  
Operations Officer  
Thomas McCarty, Director, Corporate Development  
Jonathan Sands, Executive Vice President of  
National Accounts

## FINANCE

Dynelle Lunsford, Chief Financial Officer  
Maxwell Adewusi     Vicki Huxford  
Stacia Foreman     Eboni Tynes  
Diane Pfeifer

## HUMAN RESOURCES

Angela Wood, Chief Human Resource Officer  
Ruth Anne Reed  
Marie St. Clair

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Carey Waldrip, Chief Information  
Technology Officer  
Edwin Anderson     Kevin Cox  
Victoria Doheny     Gregory Foster  
Elena Ganeko     Jason Green  
Alan Kapadia     James Kitzmiller  
Bryce Lohr     Russ Stewart

## MISSION DELIVERY EXECUTIVE STAFF

Erin Moaratty, Chief of External Communications  
Tina Rudolph-Smith – Director, Technology  
Coordination and Implementation

## DIRECT PATIENT SERVICES:

Pat Jolley, RN, Patient Services Supervisor	
Shauna Hatfield	Vonya Journiette
Donna Adkins	Lisa Kelley
Carolyn Andrews, LPN	Tami Lewis, RN
Jacqueline Beard	Michelle Lira
Brendan Bietry	DeVaris Lockett
Deirdre Cappe	Leigh Loyd
Marisol Cardona-Ortiz	Sandra McAllister
Liz Cary	Danna Mobley
Michael Cernigliaro	Tammy Neice, RN
Roshunda Chapman	Jennifer Obenchain
Yashia Clarke	Gayle Petrick
Shelby Cornick	Nicole Robinson
LaQuita Durity	Ambre Schima
Cynthia Espenshade	Michelle Shanks
Erika Ibarra	Deb Smith-Porter
Wanda Febus	Martha Smith
Jane Garfield	Candace Sona
Lakendra Green	Judith Storey
Laurel Gregory	Francisco Villegas
Margie Griffin	Tanya Walker, RN
Cheryl Grizzle Morris	Jamilla Williams
Donna Haraburda	Patricia Witherspoon
Michelle Herbert	Lisa Wright
Courtney Jones	Patricia Jones



**LISA WOODS**

STAGE I BREAST CANCER  
PHILADELPHIA, PA

*“My experience was  
overwhelmingly positive.*

*My case manager, Laurel Gregory, was  
responsive, reactive and receptive. During my  
worst health crisis, I found PAF to be just  
what the doctor ordered. Thank you!”*

# PAF STAFF FY 2009/2010

## CO-PAY RELIEF PROGRAM

Pam Cleck, Director  
 Beverly McNearly-DaRavalliere, Assistant Director  
 Mary Altomare Willie Lovett  
 Tracy Andrus Christina McKinney  
 John Barrino Michelle McMillian  
 Milagros Blanco Marcie Murillo  
 Stephanie Bland Lisa Pankowski  
 LaToya Blizzard Rebekah Phelps  
 Jackie Bruckheimer Daniel Ratcliff  
 Tatiana Carter Rita Robinson  
 Carly Coleman Rocquel Robinson  
 Cynthia Edwards Tina Santiago  
 Laura Evans Sandra Scott  
 Chaela Exum Karen Seitz  
 Melissa Fairbanks Lewis Shivers  
 Jennifer Fernaays Jennifer Spivey  
 Ellen Gillard Monica Stokes  
 Ashley Gilliam Melissa Taylor  
 Kristin Goforth Brenda Tinner  
 Joyce Grimes Sherri Walker  
 Viola Jackson Cliftonette "Robin" Wilson  
 Angela Johnson Candis Windsor  
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Tara Girard, Director  
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 Rebecca Edmondson Jenna Ross  
 Amanda Hooten Lisa Shaw  
 Danielle Jackson Linda Shird  
 Sarah Lane Michelle Spriggs  
 Towana McKinney Rebecca Toomey  
 Amber Mitchell Whitney Thornton  
 Deborah Monelly Vanessa Toro  
 Tanna Palmer Michael Trapp  
 Nanette Roos

## MED CARELINE PROGRAM

Fredna K. Bailey, RN Elaine Martinez  
 Carlette Hattett Cheryl Nowell  
 Kenneth Jacobs Patricia Turner



**JOHNNY JONES**  
 STAGE III PROSTATE  
 CANCER  
 BARTOW, FL

*"I never thought that I would be writing a letter like this to anyone that shows you how one day you can be up and the next day down. When my doctor informed me that I had prostate cancer, I knew my life was over. Little did I know that there were wonderful people like Michelle Herbert who reach out to people like me in my time of need, also I would like to thank all of the other hard working people at PAF."*



**BARBARA SWANSON**  
 CHEMOTHERAPY  
 INDUCED ANEMIA/  
 CHEMOTHERAPY  
 INDUCED  
 NEUTROPENIA  
 SUN LAKES, AZ

*"Thank you so much for the grant to help with my chemotherapy treatments. Your assistance will make it possible for me to have some savings left to live on when my treatment is completed and my ovarian cancer is in remission. I am hoping it will be before the start of 2010 so I can start the year fresh. I am working to remain active with a little golf and swimming. Soon the hot Arizona Summer will be over so more activity will be possible. Once again, I am very grateful for your assistance."*





PAF STAFF COMPLETED **634** OUTREACH  
AND EDUCATION EVENTS THIS YEAR,  
REACHING MORE THAN **415,000** PEOPLE  
NATIONWIDE. DISTRIBUTING MORE THAN  
**125,000** PIECES OF EDUCATIONAL MATERIALS



# Acknowledgements

## PATIENT ADVOCATE FOUNDATION ANNUAL REPORT ACKNOWLEDGMENTS

Editor-In-Chief	Nancy Davenport-Ennis, Founder & Chief Executive Officer
Editors/Writers	Fran Castellow, MEd., President, Operations Alan Richardson, Chief Development Operations Officer
Contributors	Beth Darnley, President, Mission Delivery Pat Jolley, RN, Chief of Patient Services Erin Moaratty, Chief of External Affairs Dynelle Lunsford, Chief Financial Officer Jamilla Williams, Director, Case Management Pam Cleck, Director, Co-Pay Relief Program Carolyn Andrews, Program Director, National African American Outreach Program Wanda Febus, Program Director, National Hispanic/Latino Outreach Program Margie Griffin, Program Director, Senior Services Jackie Beard, Program Director, Virginia Cares for the Uninsured Program Courtney Jones, Program Director, LIVESTRONG™ Partnership Program Gayle Petrick, Program Director, American Cancer Society Partnership Program Michelle Shanks, Program Director, PAF/CDC Cancer Prevention and Survivorship Partnership Tami Lewis, RN, CCM, Program Director PAF/CDC Hematologic Cancer Education & Outreach Program Liz Carey, Data Analyst

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[WWW.COLORECTALCARELINE.ORG](http://WWW.COLORECTALCARELINE.ORG)  
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# Save the Date

10th Annual

*A Promise of Hope Affair*

February 26, 2011

Newport News Marriott at City Center  
Newport News, Virginia

*“A Night at the Oscars™”*

[www.promiseofhope.net](http://www.promiseofhope.net)



12th Annual

Patient Congress

June, 2011

Washington, DC

[www.pc.patientadvocate.org](http://www.pc.patientadvocate.org)



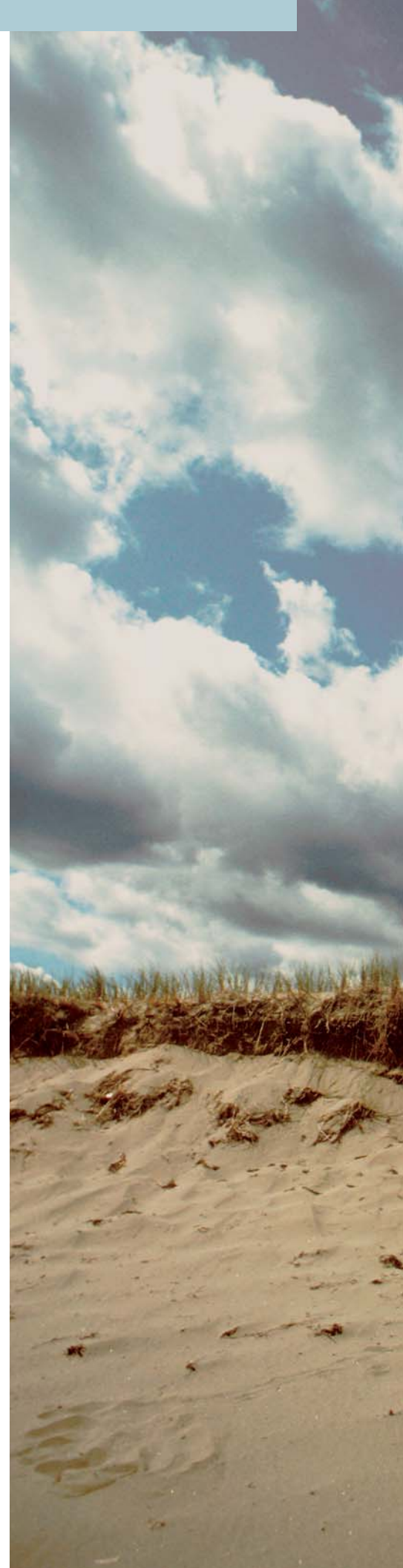
2011-2012

Scholarship for Survivors

Application Deadline: April 12, 2011

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

Listed Under “*Programs*” Section





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FAX: 757.873.8999  
[www.patientadvocate.org](http://www.patientadvocate.org)  
[info@patientadvocate.org](mailto:info@patientadvocate.org)



Colorectal CareLine  
A Med CareLine Program  
TEL: 1.866.657.8634  
FAX: 757.952.2031  
[www.colorectalcareline.org](http://www.colorectalcareline.org)  
[ccl@patientadvocate.org](mailto:ccl@patientadvocate.org)



TEL: 1.866.512.3861  
FAX: 757.952.0119  
[www.copays.org](http://www.copays.org)  
[cpr@patientadvocate.org](mailto:cpr@patientadvocate.org)

## Mission Statement

Patient Advocate Foundation is a national non-profit organization that serves as an active liaison between the patient and their insurer, employer and/or creditors to resolve insurance, job retention and/or debt crisis matters relative to their diagnosis through case managers, doctors and attorneys. Patient Advocate Foundation seeks to safeguard patients through effective mediation assuring access to care, maintenance of employment and preservation of their financial stability.