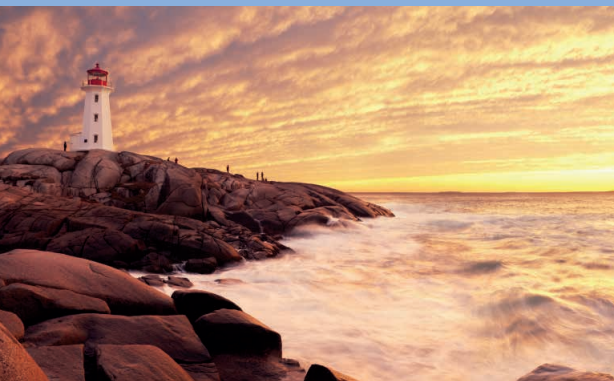




2016 ANNUAL IMPACT REPORT

BUILDING A  
CASE FOR

*Hope*



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PAF professionals directly intervene on behalf of more than 100,000 patients annually, enabling them to access prescribed healthcare services and medications, overcome insurance barriers, locate resources to support cost of living expenses while in treatment, evaluate and maintain health insurance coverage and better manage, or reduce, the out-of-pocket medical debt associated with an illness.

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BUILDING A  
CASE FOR  
*Hope*

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## OUR MISSION

Patient Advocate Foundation is a national 501(c)(3) non-profit organization which provides case management services and financial aid to Americans with chronic, life-threatening and debilitating illnesses.

PAF case managers serve as active liaisons between the patient and their insurer, employer and/or creditors to resolve insurance, job retention and/or debt crisis matters as they relate to their diagnosis.

Patient Advocate Foundation seeks to safeguard patients through effective mediation assuring access to care, maintenance of employment and preservation of their financial stability.

# Welcome

PAF provides hope and help to one patient at a time. This report serves as an annual assessment and presentation of PAF's impact on the lives of patients and their caregivers. We design our programs and services to optimize their ability to make a difference and then we apply specific metrics to measure their impact.

We have now served roughly 928,078 patients with direct support since our inception in 1996. In this past year, PAF worked with 105,792 patients and made over 1.4 million contacts with various stakeholders vital in resolving patients' cases and issues. PAF has consistently dedicated itself to assisting underserved and financially challenged populations. In the past year, for instance, 54% of the patients PAF served through our case management department had a household income of less than \$23,000.

PAF's professional staff is dedicated to finding unique solutions to complex financial, logistical, and administrative problems faced by our patients. In 2016, the Patient Advocate Foundation's case management programs served more than 20,000 patients, resolving 36,173 unique issues on their behalf, and our financial assistance programs allocated more than \$86 million to 50,944 patients. This report highlights other key programs and services as well.

The many programs and activities outlined herein would not be possible without the generosity of our supporters. We optimize each donation, no matter how big or small, through our commitment to the fiscal stewardship of those gifts. Of every dollar raised, roughly 96% goes to support a program that will directly impact a patient.

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*"PAF's professional staff is dedicated to finding unique solutions to complex financial, logistical, and administrative problems faced by our patients."*

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PAF was once again awarded a 4-star rating from Charity Navigator, its highest rating, for the 7th consecutive year. Only 3% of the charities rated have received 7 consecutive 4-star ratings.



At PAF, we will continue to be driven by purpose and sustained by passion to bring practical support to patients who are struggling. Thanks for your past and future support as we continue to help those who need it most.

*Alan J. Balch*

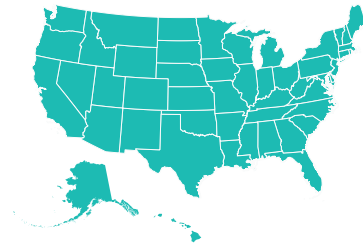
Alan J. Balch, PhD  
Chief Executive Officer

PAF routinely monitors data from our programs to gauge the impact of our patient service activities, to ensure that the programs and initiatives are aligned with the organization's mission and to always keep the patients' needs in the foreground.

## Summary of PAF Total Patient Cases and Contacts in 2016

Total Patient Services Division Case Count	105,792
Case Management Division Case Count	20,286
Co-Pay Relief Case Count	49,760
Financial Support Programs Case Count	22,081
Patient Services Email Helpline Session Count	13,665
Total Patient Services Division Case Contacts	1,405,906
Total Patients Served by PAF as of 2016	928,078

**SERVED  
PATIENTS  
FROM ALL  
50 STATES**



PAF PATIENTS  
SERVED  
*Increased* **31.2%**



Patient Advocate Foundation  
**CO-PAY RELIEF**  
**96.4%** SERVICE  
INCREASE

PATIENTS  
REPORTED  
**419**  
DIFFERENT  
DIAGNOSES

*Negotiated*  
**\$31,700,020**  
in **DEBT RELIEF** on  
Behalf of Patients

## Testimonials

*"On October 7, 2016 I was diagnosed with breast cancer. As a mother of two young boys I knew I had to fight to survive to help raise them. I never imagined within weeks I would have a bigger battle to fight. I was being denied my employer's disability insurance. I was very frustrated and didn't know where to turn. A friend recommended the Patient Advocate Foundation. I was fortunate enough to be connected with a case manager who talked about how we could request reconsideration. She helped me through the entire process, she conference-called the insurance company with me on the line and she also helped me write a letter to the company. Thanks to my case manager's help, I received the disability pay. She not only helped in the fight, she regularly called to check on me and to ask if I needed any other help. Indeed I did! She agreed to help with an outstanding DNA testing bill that doesn't appear to be covered by insurance. I wish every cancer patient could have a PAF case manager in their corner."*

Amy H. | California | Breast Cancer



*"I requested assistance from PAF with a medication issue. I was extremely pleased with the help I received and was referred to. The time used to assist me was precious and the end results were very appreciated."*

Hilda C. | New York | Rectal Cancer

*"I am a veteran diagnosed with cancer. It has been difficult for me to call out for help when I have always been the one providing the help. The Patient Advocate Foundation helped sustain my housing and address the expenses associated with everyday living. With my heart in hand, thank you from the bottom of my heart for the support, care and humanitarian act you rendered on my behalf and the other veterans like me."*

Edwin H. | Florida | Cancer



*"PAF's service was absolutely excellent and my case manager was a godsend. I needed assistance with disability and her handling of my issue was so professional – she is worth all the gold in Fort Knox."*

Michael J. | Pennsylvania | Bladder Cancer

*"I just wanted to say thank you for having such awesome staff members helping people like me that are dealing with life issues like HIV. You made me feel like I really matter and you did a great job getting me approved to get help from the Patient Advocate Foundation's Co-Pay Relief Program. I was worried and now I can get my medication. Thank you."*

Wallace H. | Florida | HIV

*"Most people would not be able to take the cost of life-saving treatment without the Co-Pay Relief Program."*

Arthur R. | Washington  
Hepatitis C





## Testimonials

*"During the Holiday Season... I finally received the number to Patient Advocate Foundation, where I left a message and the next day a case manager returned my call. Little did I know she would be the blessing of the day and year. She helped me make the same phone calls I had been making all week without getting any answers. She went beyond the call of duty to get answers I needed to move forward with receiving my medications. She spoke to pharmacies, nurses and representatives until she received what was needed. Due to my case manager's determination to help me, I found out what my co-pay was and then she worked to get help. She followed up with a letter thanking me for my call, but she did all the work, making sure an individual's health came first. Thank you so much and may God bless PAF as you continue to help others."*

Roshyn C. | South Carolina | Pulmonary Hypertension



*"Everything was to my satisfaction, with regard to the medication issue – which is something for which I am eternally grateful – God bless you."*

Blanca A. | Michigan  
Brain Tumor



*"My PAF advocate spoke with billing and had information sent to me to get help with my medical bills. She also contacted a resource to help me get my medications at a lesser cost."*

Mary R. | South Carolina  
Autoimmune Disorder

*"I wanted to take a moment to let you know what your organization has meant to me. I've been dealing with breast cancer since July. Fortunately for me, when it seemed I would be overwhelmed with the paperwork, my PAF case manager got in touch with me – words just cannot describe ALL he did. You have to understand before he got involved I did not have the time to take care of my health, I was too busy fighting with insurance companies. My insurer at one point approved a hospital stay for me, and after the fact denied coverage!!! Then the hospital sent me a bill for \$66,000!!! Then 12 different doctors started sending their bills. I was so overwhelmed and was undergoing chemotherapy at the time. My case manager stepped in, and after dozens and dozens of phone calls and emails. I don't know how he did it, but the insurance company paid the \$66,000 bill, and most of the doctors were also paid. What a relief-I was not in this fight alone, there are people - not just my case manager - but an entire organization out there that cared about me. Thank you so very much!"*

Barbara D. | Arizona | Breast Cancer

*"Your staff was helpful and friendly and assisted with all of my questions and the follow up by your Co-Pay Relief Program has been exceptional. There are many individuals who are experiencing extremely high costs for medications and medical treatments not covered by their insurance. Thank you for your assistance to date – it has allowed me to go forward with another medication, which may literally save and significantly extend my life and my work."*

William W.  
South Carolina  
Prostate Cancer



# Case Management

## 4 NEW PROGRAMS Launched

- Jennifer Jaff CareLine
- ALS Association Medicare Home Health & Chapter Education
- ZERO360: Comprehensive Patient Support
- West Virginia Lung Cancer CareLine



**394,630**  
**CONTACTS MADE**  
*While Resolving Cases*

Averaging 19.45 Contacts Per Patient Served



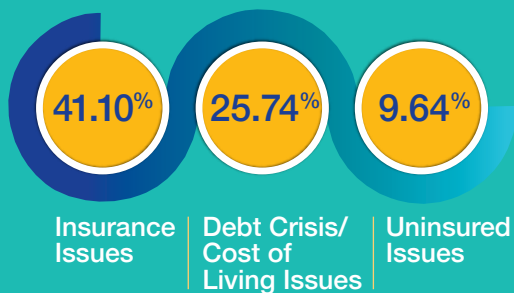
MORE THAN  
**20%** **INCREASE**  
in **PATIENTS**

with **CARDIOVASCULAR CONDITIONS** or  
**CHRONIC** and/or **DEBILITATING CONDITIONS**

## Case Management (compared to previous year)

**11%** more patients served + **19%** more unique issues resolved

**TOP ISSUES** Faced by Patients Seeking Case Management Help



**SOME TOP RESOLUTIONS**  
Achieved by Case Managers

- ✓ Facilitated/Obtained Medical and Pharmaceutical Co-pay Assistance
- ✓ Marketplace/Exchange Plan Selection/Enrollment Assistance
- ✓ Facilitated/Secured Free Transportation Assistance
- ✓ Approval/Overtaken Denial of Disability Benefits
- ✓ Approved for Medicaid





## Case Management Program

Completed 20 Years  
of Service in April 2016

*Negotiated*

**\$31,700,020**

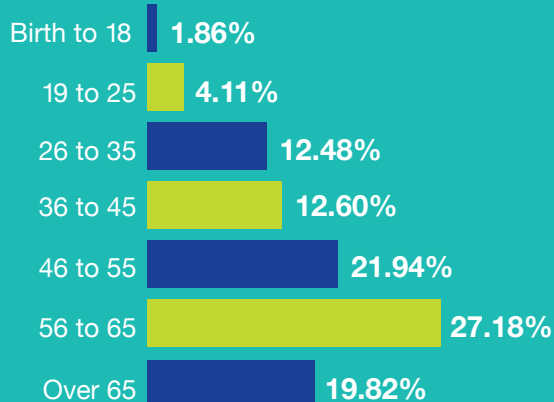
in **DEBT RELIEF** on  
Behalf of Patients

**20%  
DECREASE**

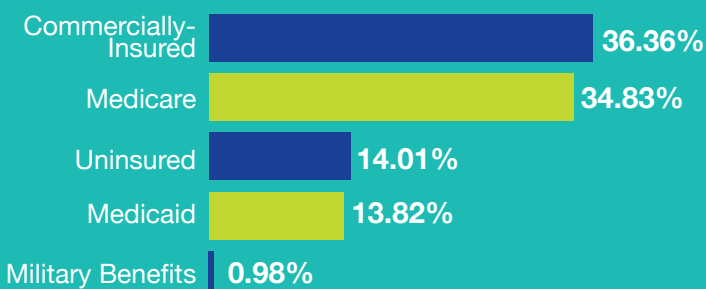
in the Number of  
Uninsured Issues  
Reported By Patients

## CASE MANAGEMENT PATIENTS

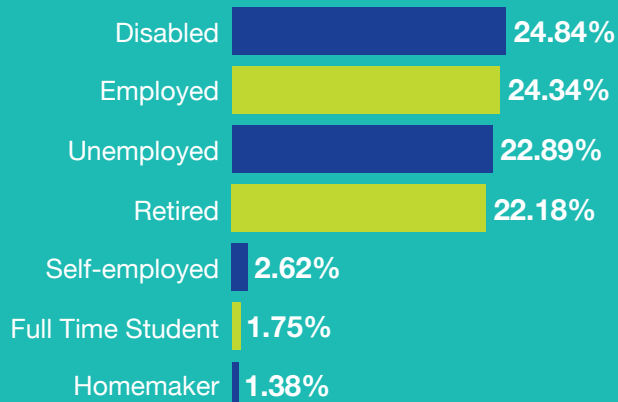
### Age of Patients



### Insurance Type



### Employment Status



**Case management** was the original patient service program offered by Patient Advocate Foundation (PAF) when the organization was founded in 1996, with a mission to provide assistance to both insured and uninsured patients who have been diagnosed with a chronic, life-threatening and/or debilitating illness. Today, PAF case managers directly intervene on behalf of thousands of patients each year, enabling them to connect with and maintain access to prescribed healthcare services, overcome insurance barriers, locate resources to support cost-of-living expenses, evaluate and identify insurance coverage and manage out-of-pocket expenses associated with medical treatment.

During 2016, the case management programs experienced substantial growth, increasing the number of patients served by 11% over the previous year; launching four new programs, expanding two existing programs and introducing two new financial aid funds. There was a 9.8% rise in the number of cancer patients served, while the number of patients reporting chronic and/or debilitating conditions increased almost 25%, and the number of cardiovascular patients grew by more than 22%.

More than 72% of patients contacting PAF reported an annual household income of \$35,000 or less. Approximately the same percentage of case management patients reported being disabled (24.8%) as employed (24.3%), while 22.1% were retired.

Overall, the PAF case managers assisted 20,286 patients, encompassing 419 different diagnoses. These patients reported 36,173 unique healthcare access issues, a 19% increase from the previous year.

The top three issues faced by patients seeking case management assistance were *Insurance Issues* at 41.10%, *Debt Crisis/Cost of Living Issues* at 25.74% and *Uninsured Issues* at 9.64%. *Insurance Issues* included co-pays for pharmaceuticals and facility/doctor visits; co-insurance assistance for hospital/facility visits and for Medicare cost share; and general benefit/coverage questions. *Debt Crisis/Cost of Living Issues* included inability to afford transportation expenses, inability to afford rent/mortgage, inability to afford utilities and inability to afford food/nutritional needs. *Uninsured Issues* included no access to care, no access/no coverage for prescription needs, unpaid medical bills and Medicaid application assistance needed.

Reaching resolution on these issues required PAF's professional case managers to make 394,630 contacts with the patient, providers, insurers, non-profit charities or organizations and pharmaceutical programs. On average, there were 19.45 contacts made per patient assisted. The case managers actively worked with

## Summary of PAF Case Management Patient Cases and Contacts in 2016

Total PAF Case Management Case Count	20,286
Unique Case Management Patient Issues	36,173
Total PAF Case Management Contacts	394,630
Average Contacts per Case	19.45

the patients to obtain charity write-offs, assist with enrolling into disease-specific and pharmaceutical assistance programs, correcting coding and billing issues and identified alternative funding to aide in maintaining insurance coverage. The case managers were able to obtain \$31,700,020 in debt relief this year on behalf of PAF patients.

The top three resolutions achieved by case managers were *Insurance Resolutions* at 41.20%, *Debt Crisis/ Cost of Living Resolutions* at 28.83% and *Uninsured Resolutions* at 8.66%. *Insurance Resolutions* included facilitated/obtained co-pay assistance, negotiation of payment plan/discount, education on general benefit/ coverage questions, facilitated/obtained full/partial charity care for the underinsured and enrollment into pharmaceutical indigent drug program. *Debt Crisis/ Cost of Living Resolutions* included facilitated/secured free or charity based transportation assistance, facilitated rental/mortgage payment relief, facilitated utility/phone relief and offset cost through alternative assistance. *Uninsured Resolutions* involved facilitating access to care through local clinic/hospital/doctor, facilitated/identified new insurance coverage, enrolled/ approved for pharmaceutical indigent drug program, approved for charity care through hospital/medical facility and approved for Medicaid/share of cost.

## Testimonial Spotlight

*"I called PAF for assistance with medical debt. My case manager sent me hardship letters and I sent three of them to companies that billed me for lab tests. These are the co-pays that I don't have the finances to pay anything on as I only have Social Security. God bless you for what you have been able to do."*

Marie W. | Tennessee | Stomach Cancer

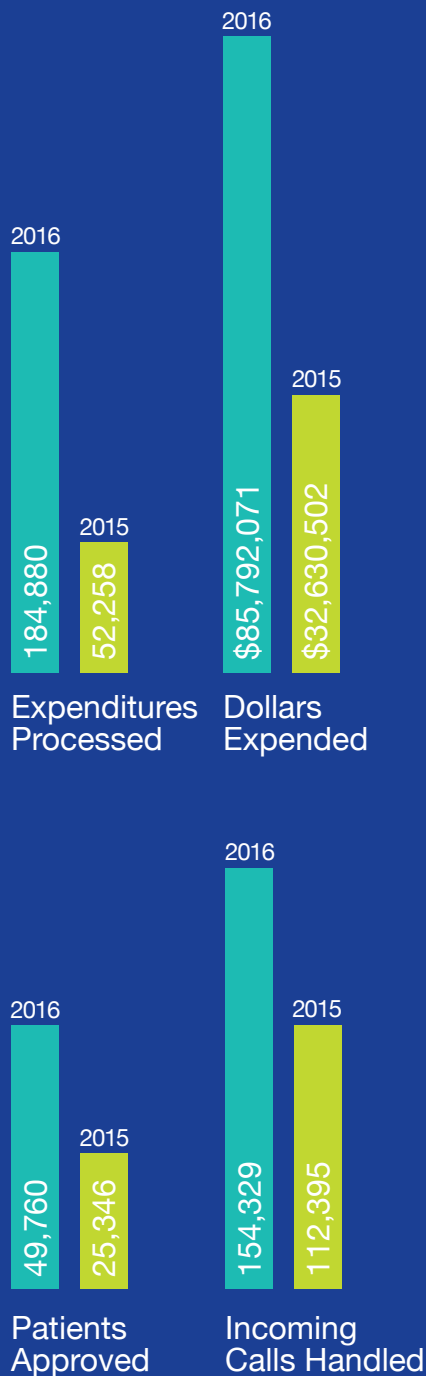


## CASE POINT PLATINUM AWARDS - HONORABLE MENTION

Patient Advocate Foundation was again recognized by Dorland Health with three Case in Point Platinum honorable mentions in 2016. One honorable mention was presented for Targeted Health Data Collection in the category of Health Information Technology Systems. Another was presented to PAF for the Komen Treatment Program in the Care Coordination section of the Social Work category, and finally, the Foundation ACCESS Care Line was honored.

# Co-Pay Relief Program

## CPR SERVICE LEVEL PERFORMANCE



*Co-Pay Relief Program*

Completed 12 Years  
of Service in April 2016



CPR EXPENDED MORE THAN  
**\$85.7 MILLION**  
in assistance to patients —

CPR PATIENTS  
SERVED  
*Increased* **96.4%**



**CPR SUPPORTS**  
*all* Prescribed Treatments &  
Secondary Medications  
Regardless of Brand or Generic Status

Patient Advocate Foundation's **Co-Pay Relief Program (CPR)** provides financial assistance to medically and financially qualified patients who are unable to afford their out-of-pocket responsibilities for pharmaceutical co-payments, co-insurance and deductibles required by their insurance plan. The Co-Pay Relief Program is the second oldest in the country, launching in April 2004. It was born of a demonstrated need within PAF's case management division. CPR combines a robust portfolio of technology tools with a hands-on, personal service model, providing patients with instant eligibility determination speed to therapy and compassionate assistance throughout their award period.

Placing the needs of our patients at the foreground, CPR funds support all prescribed treatments and secondary medications relative to the diagnosis regardless of brand or generic status.

Electronic income verification is performed on all patients' reported income, eliminating the need for document submission in more than 95% of cases. Applicant diagnoses and insurance are verified with treating physicians by Co-Pay staff members, further reducing the administrative burden placed on patients.

All aspects of CPR experienced substantial growth during 2016, with the program launching three new disease silos, expanding several open silos, re-opening silos that were previously closed and providing 162.9% more financial assistance to patients than in the previous year of 2015. The program approved 49,760 patients, a 96.4% increase from 2015, expended \$85,792,071, with the staff processing 184,880 expenditure submissions and successfully managing 154,329 incoming calls.

The disease areas served by the program in 2016 included:

- Bladder Cancer
- Periodic Paralysis
- Breast Cancer
- Cervical Cancer
- Hepatitis B
- Hepatitis C
- HIV, AIDS and Prevention
- Homozygous Familial Hypercholesterolemia
- Lipodystrophy
- Metastatic Colorectal Cancer
- Multiple Myeloma
- Multiple Sclerosis
- Myelodysplastic Syndrome
- Non Small Cell Lung Cancer (NSCLC)
- Ovarian Cancer

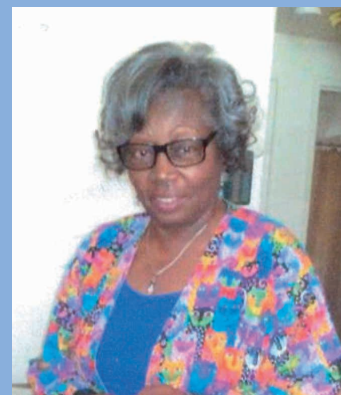


DISPENSING HELP, DELIVERING HOPE

### *Testimonial Spotlight*

*"I would recommend the Co-Pay Relief Program because one who really needs the assistance can get help. The call counselor was professional, patient and thorough and all questions asked were directly related to getting help for the patient. I was very satisfied with my experience."*

Gloria F. | Texas | Osteoporosis



# Education & Outreach

## PATIENT EMPOWERMENT SERIES



**500+ PEOPLE**  
REGISTERED FOR WEBINARS

*A 24.7% Increase*



**15 ROBUST,  
ON-DEMAND  
SESSIONS**

*Available in the Patient Empowerment  
Series Digital Library*

## HEALTH EQUITY AND COMMUNITY ENGAGEMENT



**ONGOING**  
*Community Outreach*  
**PROJECTS**



**Patient Advocate  
Foundation**



*July, 2016 - Introduced the*

**WV Lung Cancer CareLine**



**SELECTED AS ONE OF  
THREE NATIONAL NETWORKS  
TO IMPLEMENT**

*"Inside Knowledge"*  
to Increase Awareness  
of Gynecologic Cancers



**ATTENDED 4**  
*Targeted National  
Outreach Events*  
**REACHING MORE THAN  
1,400 ATTENDEES**

*Developed & Published*

**5**

**ORIGINAL  
FACT SHEETS**



*as part of the Determinants of Health Series*

**Resulting in Nearly 1000 Downloads!**





## PATIENT EMPOWERMENT SERIES

The Patient Empowerment Series (PES) features practical advice on the most frequently reported access barriers and/or educational concerns as identified through PAF's years of delivering case management services. This educational series features live webinars, interactive web-based resource tools, access to the comprehensive PAF resource library and supplemental social media posts providing advice and in-depth education on healthcare issues.

In 2016, nine new webinars were presented covering topics that included Accessing Disability Benefits, Clinical Trials, Genomic versus Genetic Testing, Preventive Care, Medicare Basics and Interpreting your Insurance Drug Formulary. More than 500 attendees registered for these webinars, which represents a 24.7% increase in registrations over the previous year. The webinar series engages a diverse audience comprised of patients, caregivers, medical professionals and financial advocates, many of whom returned to attend additional sessions in the series.

The Patient Empowerment Series library now contains 15 on-demand sessions available for viewers who are striving to be informed consumers of their healthcare.

## HEALTH EQUITY AND COMMUNITY ENGAGEMENT

The Health Equity and Community Engagement initiative expands the level that existing PAF programs are able to use to effectively identify underserved and under-resourced patients within the healthcare system, evaluating service gaps that may exist and developing appropriate strategies to assist. It emphasizes community outreach and partnership-building with a goal of establishing pipelines from limited resourced communities to the platform of services and resources available through Patient Advocate Foundation.

### Examples of Community Level Outreach & Engagement Activities Include:

- Sister Pact (Memphis)-Breast Cancer Screening Campaign
- Memphis Breast Cancer Consortium
- Diversity in Clinical Trials (Chicago) #BeAGift Campaign
- West Virginia Lung Cancer CareLine
- Lupus Native American Partnership (Oregon) Partnership with the American College of Rheumatology

Top: PAF's Executive Vice President of Health Equity, Shonta Chambers, at the Breast Health Collaborative of Texas Summit, which brings together local community health navigators and breast cancer patients, connecting them to community resources.

Bottom: PAF Case Manager Danna Mobley at the inaugural Memphis "LIVE: Just as We Are Event," a community event linking Memphis residents to resources.



**3 LIVE WEBINARS**

**Conducted as Part of the SMHN "Opening Doors" Webcast Series**

**68%** Attendance Rate



## CENTERS FOR DISEASE CONTROL & PREVENTION (CDC) GRANT

Patient Advocate Foundation's SelfMade Health Network (SMHN) is one of eight members of the CDC's Consortium of National Networks to Impact Populations Experiencing Tobacco-Related and Cancer Health Disparities. SMHN is a national network of organizations, agencies and public health



institutions working together to decrease cancer and tobacco-related disparities among low socio-economic status (SES) populations. Specifically, the SMHN focuses on those populations with low socio-economic characteristics in rural, urban and frontier regions.

### Accomplishments Include:

- Selected Meharry Medical College as the Regional Resource Lead Organization for Region A (Tennessee) to identify and pilot best practice strategies to reduce breast cancer disparities among African-American women with low SES characteristics.
- Selected University of Kentucky College of Public Health as the Regional Resource Lead Organization to lead efforts across the Appalachia region to identify and pilot best and promising practices to reduce lung cancer disparities among Caucasian men.

- Completed first year of the SelfMade Health Network Tobacco Cessation Marketplace Project, designed to incorporate brief cessation counseling into the marketplace enrollment process among certified ACA marketplace enrollment organizations.
- Developed and published five original fact sheets as part of the Determinants of Health Series resulting in nearly 1,000 downloads.
- Selected as one of three national networks to implement "Inside Knowledge," an educational series to increase awareness of gynecologic cancers with a focus on African-American, college-age women.

## WEST VIRGINIA LUNG CANCER CARELINE

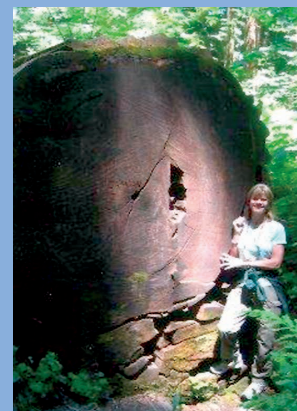
The West Virginia Lung Cancer CareLine is a partnership with the West Virginia Lung Cancer Project and provides lung cancer patients, or those being screened for lung cancer, with hands-on case management and insurance support.



## Testimonial Spotlight

*"I was overwhelmed – no insurance, very limited income, and a diagnosis that knocked the wind out of me. My Patient Advocate guided me, gave me options – even conference-called with me to help get me answers and started on a road that provided me assistance emotionally, financially and much needed information. I am forever grateful!!"*

Nancie M. | Florida | Lymphoma



Through our **Financial Aid Programs**, the Patient Advocate Foundation provides small grants to patients for a broad range of support needs as well as partnering with other organizations to manage all administrative aspects of their financial assistance programs.

PAF's financial aid portfolio is quite diverse with eight individual programs available to patients in 2016.

Financial Aid Programs served 22,081 patients in 2016. The financial aid program staff received more than 162,950 calls and processed 73,648 expenditure requests on behalf of patients.

The PAF small grant programs provide critical support for a variety of non-pharmaceutical needs including transportation costs associated with getting to and from treatment, housing and lodging, utilities, food/nutrition needs and pre-burial expenses.

## Testimonial Spotlight

*"Thank you for assisting me and enabling me to meet my drug co-pay. I contracted hepatitis C from a blood transfusion in the late 1980s during labor and delivery when I had a C-section. The doctors tried very hard to save me and my infant at this time. My baby boy died. But, the blood transfusions, even though they gave me hep C, saved my life. I had other children at home to take care of and I'm thankful that I was able to live to raise them. I only recently found out that I had this disease. Your gift gave me hope in being able to afford this medication. I want to thank PAF again, I will always be grateful for your wonderful organization."*

*Annmarie B. | New York | Hepatitis C*



**DIVERSE  
FINANCIAL  
SUPPORT  
PORTFOLIO**

**SERVED**   
**22,081** *Patients*



**5.7% INCREASE**  
in Number of  
**Patients Served**



**16% INCREASE**  
in the Number of  
**Calls Received**



## PROMISE OF HOPE

Patient Advocate Foundation held its 15th annual Promise of Hope Affair (POH) on February 27, 2016, at the Newport News Marriott at City Center, drawing 336 guests not only from PAF's hometown, but across the United States. The theme celebrated "Pearls and Poker," a salute to the Roaring 20's.

Funds raised during the silent auction and live "fund-a-need" auction benefited the Scholarship for Survivors program and allow PAF to assist new students in need each year. Barbara Ciara, WTKR-Channel 3 (CBS), managing editor and news reporter, served as our Mistress of Ceremonies.



Guests peruse the silent auction area at the Promise of Hope Event.

To learn more about the Promise of Hope event, please visit [promiseofhope.net](http://promiseofhope.net).

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## PATIENT CONGRESS

Patient Congress (PC), is a two-day symposium that strives to educate attendees on current healthcare issues at federal and state levels.

PAF convened its 17th Annual Patient Congress on June 21-23, 2016. With nearly 50 attendees, this event engaged patients, caregivers, advocacy group representatives and National Patient Advocate Foundation (NPAF) volunteers. The main topics were the impact of medical debt and medical bankruptcy on patients.

Noted speakers included: Joel Payne, Vice President, QORVIS MSLGROUP; Lauren Oppenheimer, Minority Staff Director, Senate Banking Committee/Legislative Assistant, Office of Senator Jeff Merkley (D-OR); Erika Jeffers, Senior Policy Director, House Committee on Financial Services and Minority Staff, Ranking Member Maxine Waters (D-CA).

To learn more about the event, please visit [npaf.org/patientcongress](http://npaf.org/patientcongress).



Group photo of NPAF staff, including Alan Balch, CEO, and volunteers at the 17th Annual Patient Congress prior to Hill meetings.

## SCHOLARSHIP FOR SURVIVORS

The Scholarship for Survivors Program offers educational scholarships to individuals who have suffered, or currently suffer, from a life-threatening disease or chronic condition. These students have, despite their health challenges, excelled academically, served the community, and desire to pursue or complete a secondary education.

Selected applicants will receive \$3,000 annually for up to four consecutive years, as long as they continue to meet the guidelines of the program.

To date, PAF has awarded 71 scholarships totaling over \$436,000. To learn more about supporting the scholarship program, or to apply for a PAF scholarship, please visit [patientadvocate.org/scholarships](http://patientadvocate.org/scholarships).

  
Awarded  
**71 SCHOLARSHIPS**  
**TOTALING**  
**\$436,000**  
**SINCE 2000**

## 2016/2017 academic year Scholarship for Survivors recipients

### *The Cheryl Grimmel Award*

Sage Chasen | PA  
Lehigh University

### *The Mark Stephens Award*

Sierra Williams | GA | University of Georgia

### *The Monica Bailes Award*

Timothy Conners | NY | Ithaca College

### *The U.S. Representative Jo Ann Davis Award*

Tiffany Hollihan | IN | Ball State University

### *The Robin Prachel Award*

Nicholas Polumbo | MA  
Massachusetts College of Art

### *The Karen L. Reeder Award*

Somer Greene | CA | Occidental College

### *The Nancy Davenport-Ennis Award*

Kaela Johnson | VA  
Virginia Commonwealth University

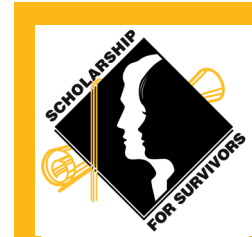
### *Scholarship for Survivors Award*

Alexa Hickman | TN  
University of Tennessee at Chattanooga

Coreyonna Welch | GA | University of West Georgia

Alexandra Xifaras | MA | Suffolk University

Isabel Allen | MA  
Boston University - College of Arts and Science



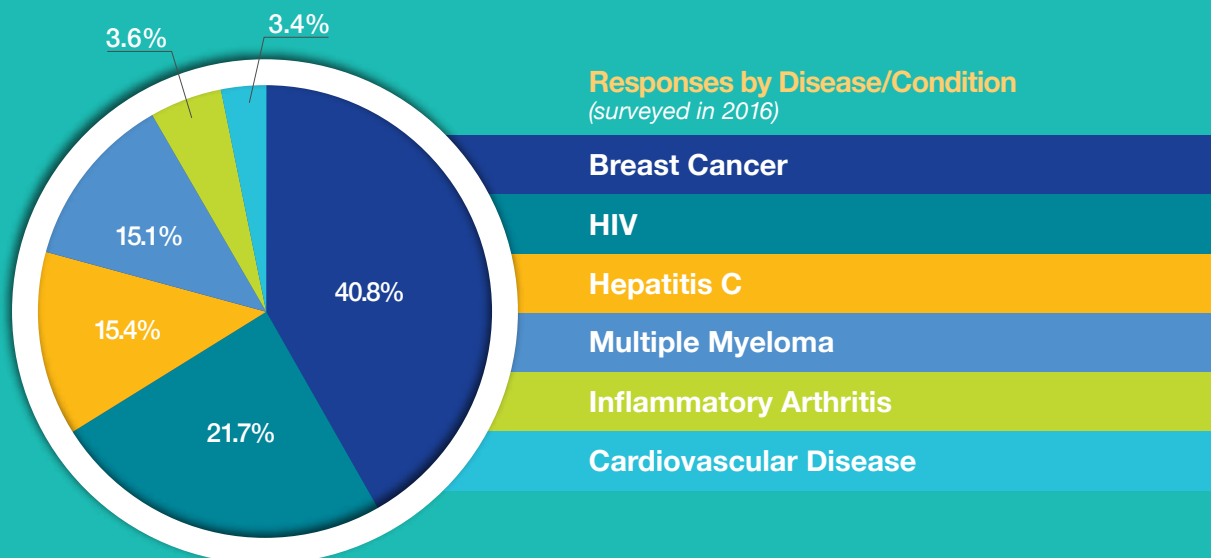
Left: Richie Suarez (second from left), PAF Scholarship for Survivors Recipient with guest Kelly Jo Stroemel and parents Ralph and Denise Suarez.



Right: Kaela Johnson, center, recipient of the Nancy Davenport-Ennis Scholarship for Survivors Award, with Barbara Ciara and Alan Richardson.

# Data & Survey Initiatives

## PATIENT VALUE SURVEY



**59.5% OF PATIENTS**

— were asked by a doctor —

**HOW THEY PREFER TO RECEIVE MEDICAL INFORMATION**  
involving care decisions

**Patients Preferred Approach to Make Decisions About Treatment:**

**64.1%** PARTNER WITH THEIR DOCTOR

**39.4%** FACTS EXPLAINED IN DETAIL

**39.3%** IMPACT ON QUALITY OF LIFE EXPLAINED BY DOCTOR



more than  
**50%** of patients  
were asked  
*what*

**THEY CONSIDER IMPORTANT**  
as part of making treatment plans



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Each year Patient Advocate Foundation reviews the aggregate data collected from our programmatic support services and analyzes it to extract themes and trends among the patients we serve. This information allows us to build survey tools to create an evidence base to help direct our policy and advocacy efforts.

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## 2016 RESEARCH INITIATIVES

- Site of Care Survey
- Hepatitis C (HCV) Access and Cost Survey
- Patient Value Survey Series

### PATIENT VALUE SURVEY SERIES (AUGUST 2016 – DECEMBER 2016)

Person-centered care refers to a way of thinking where people using health and social services are viewed as equal partners in the planning, developing and monitoring of their care, ensuring that it meets their goals and needs.

Designed with emerging trends in precision medicine, person-centered care, and Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) implementation in mind as well as the recent development of several prominent “value assessment” tools, this survey series is tied to the Robert Wood Johnson Foundation (RWJF) grant regarding consumer clarity in healthcare. It is a market research tool designed to provide insights into what patients’ self-reported experiences are and what matters most to them regarding costs, benefits and side effects as well as key decision-making processes.

Surveys were conducted by specific diseases or conditions: multiple myeloma, hepatitis C, HIV/AIDS, cardiovascular disease, inflammatory arthritis and breast cancer. Response rates for each survey ranged from 6-33% (avg. 17%). Demographics of survey respondents were reflective of the populations served by PAF.

## AGGREGATE HIGHLIGHTS FOR 2016 SURVEYS

- 36% of respondents were male, 63% female
- 37% were age 36-55, 50% were age 56-75
- 66% were White, 21% African American and 8% Hispanic
- 38% have Medicare coverage, 38% are Commercially-Insured
- 64% of respondents reported income <\$36,000 annually
- 79% had a household size of 2 or less

The primary goal of this quantitative research survey was to examine the following thematic areas from a broad patient perspective:

- Provider Communication Experience
- Disease Treatment
- Financial Implications
- Impact of Care
- Benefits & Side Effects
- Healthcare Decision Making
- Personalized Care

Additional populations will be surveyed in 2017.

# Financial Statements - FY 2015-2016 .....

## Summary of PAF Total Patient Impact in FY2015/16

<b>Total Patient Services Division Case Count</b>	<b>85,429</b>
<i>Total Case Management Division Case Count</i>	<i>18,138</i>
<i>Total Co-Pay Relief Case Count</i>	<i>35,940</i>
<i>Total Financial Support Programs Case Count</i>	<i>18,233</i>
<i>Total Patient Services Email Helpline Session Count</i>	<i>13,118</i>
.....	
<b>Total Patient Services Division Case Contacts</b>	<b>1,131,661</b>

## Summary of PAF Case Management Impact FY2015/16

### Patient Cases and Contacts in FY2015/16

Total PAF Case Management Case Count	18,138
Unique Case Management Patient Issues	29,221
Total PAF Case Management Contacts	377,698
Average Contacts per Case	20.82

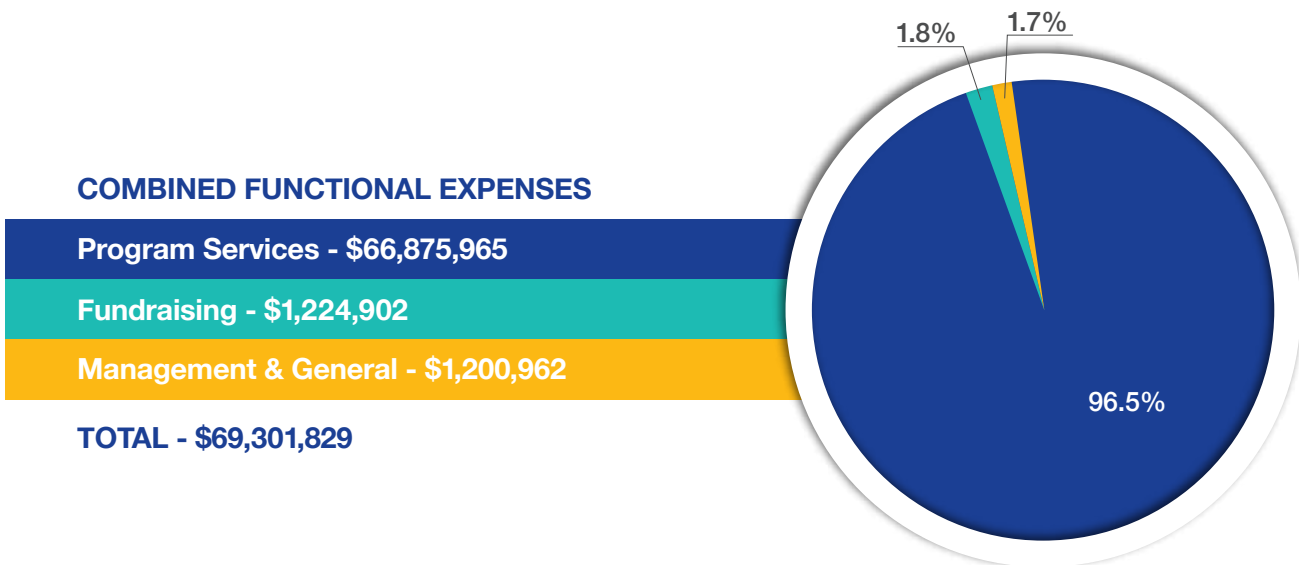
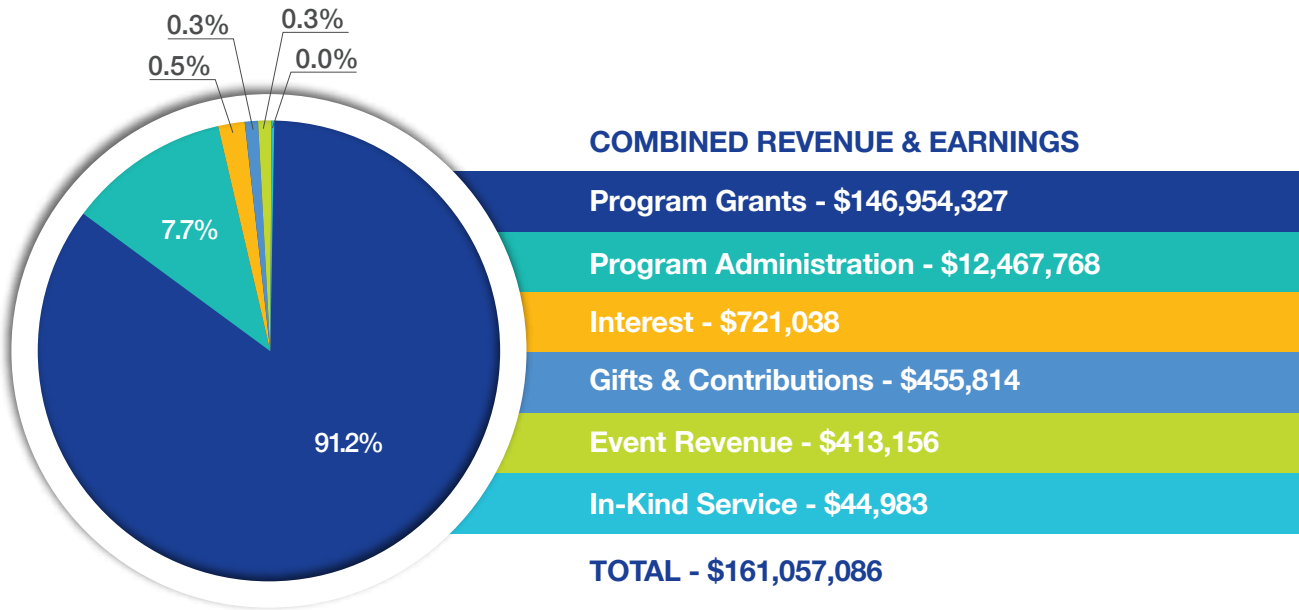
# Impact

**Patient Advocate Foundation**  
**Statements of Financial Position**  
**June 30, 2016 and 2015**

	2016	2015
<b>ASSETS</b>		
Current assets		
General operating cash and cash equivalents	\$ 9,949,251	\$ 3,425,252
Restricted cash and cash equivalents	163,016,738	72,022,026
Unconditional promises to give	1,368,354	1,603,086
Service contract receivable	317,514	447,282
Due from National Patient Advocate	10,058	-
Employee travel advances	-	300
Other receivables	-	5,590
Investments and cash equivalents	1,486,242	1,933,371
Inventories	29,290	57,869
Prepaid expenses	459,093	355,231
Total current assets	176,636,540	79,850,007
Property and equipment, net	5,784,048	4,522,313
Other assets		
Refundable deposits	50,331	53,331
	<u>\$ 182,470,919</u>	<u>\$ 84,425,651</u>
<b>LIABILITIES AND NET ASSETS</b>		
Current liabilities		
Accounts payable and accrued expenses	\$ 1,291,405	\$ 907,630
Deferred revenue	9,461,776	3,246,672
Accrued vacation leave	214,117	225,230
Due to National Patient Advocate	-	84,191
Current portion of long-term debt	246,180	217,918
Current portion of obligation under capital lease	73,912	68,770
Total current liabilities	11,287,390	4,750,411
Long-term liabilities		
Long-term debt, less current portion	816,727	1,062,082
Obligation under capital lease, less current portion	62,755	72,654
Other liabilities	110,050	101,764
	989,532	1,236,500
Total liabilities	12,276,922	5,986,911
Unrestricted	5,801,066	3,680,105
Unrestricted, board designated	1,486,242	1,933,371
Total unrestricted net assets	7,287,308	5,613,476
Temporarily restricted	162,906,689	72,825,264
Total net assets	170,193,997	78,438,740
	<u>\$ 182,470,919</u>	<u>\$ 84,425,651</u>

## Patient Advocate Foundation Statements of Activities Years Ended June 30, 2016 and 2015

	2016				2015					
	Unrestricted	Unrestricted - Board Designated	Total Unrestricted	Temporarily Restricted	Total	Unrestricted	Unrestricted - Board Designated	Total Unrestricted	Temporarily Restricted	Total
Revenues, gains and other support										
Contributions:										
Grants	\$ 5,777,671	\$ -	\$ 5,777,671	\$ 141,176,656	\$ 146,954,327	\$ 3,603,734	\$ -	\$ 3,603,734	\$ 59,530,424	\$ 63,134,158
Private and public donations	57,021	-	57,021	-	57,021	145,021	-	145,021	-	145,021
Donated services and materials	44,983	-	44,983	-	44,983	71,727	-	71,727	-	71,727
Program Administration	12,467,768	-	12,467,768	-	12,467,768	11,599,860	-	11,599,860	-	11,599,860
Patient Congress	150,000	-	150,000	-	150,000	77,500	-	77,500	-	77,500
Promise of Hope	263,156	-	263,156	-	263,156	251,504	-	251,504	-	251,504
Miscellaneous income	398,793	-	398,793	-	398,793	422,272	-	422,272	-	422,272
Investment income	656,052	64,986	721,038	-	721,038	373,693	23,949	397,642	-	397,642
Net assets released from restrictions										
Transfers	512,115	(512,115)	-	-	-	-	-	-	-	-
Satisfaction of program restrictions										
Financial Aid Awards	51,095,231	-	51,095,231	(51,095,231)	-	28,348,018	-	28,348,018	(28,348,018)	-
Total revenues, gains and other support	71,422,790	(447,129)	70,975,661	90,081,425	161,057,086	44,893,329	23,949	44,917,278	31,182,406	76,099,684
Expenses and losses										
Program services:										
Patient/educational services	6,239,892	-	6,239,892	-	6,239,892	5,972,514	-	5,972,514	-	5,972,514
Financial Aid Programs	57,268,665	-	57,268,665	-	57,268,665	32,204,574	-	32,204,574	-	32,204,574
Service contracts	3,367,408	-	3,367,408	-	3,367,408	2,857,891	-	2,857,891	-	2,857,891
Supporting services:										
Management and general	1,200,962	-	1,200,962	-	1,200,962	1,509,599	-	1,509,599	-	1,509,599
Fundraising	1,224,902	-	1,224,902	-	1,224,902	1,251,045	-	1,251,045	-	1,251,045
Total expenses	69,301,829	-	69,301,829	-	69,301,829	43,795,623	-	43,795,623	-	43,795,623
Total expenses and losses	69,301,829	-	69,301,829	-	69,301,829	43,795,623	-	43,795,623	-	43,795,623
Change in net assets	2,120,961	(447,129)	1,673,832	90,081,425	91,755,257	1,097,706	23,949	1,121,655	31,182,406	32,304,061
Net assets, beginning of year	3,680,105	1,933,371	5,613,476	72,825,264	78,438,740	2,582,399	1,909,422	4,491,821	41,642,858	46,134,679
Net assets, end of year	\$ 5,801,066	\$ 1,486,242	\$ 7,287,308	\$ 162,906,689	\$ 170,193,997	\$ 3,680,105	\$ 1,933,371	\$ 5,613,476	\$ 72,825,264	\$ 78,438,740



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## Testimonial Spotlights

*"Receiving a cancer diagnosis is a life-altering situation, both for the patient and for family members. I was always a very healthy and active person and hearing "you have multiple myeloma" was a great shock. While it was very disappointing to know that my cancer cannot be cured, it was also encouraging to hear that it could be treated. Thus began our venture into cancer treatment and all the various forms that this treatment would entail. Soon I was off my weekly infusions and transitioned to another treatment. We were so thrilled but then absolutely shocked when we learned what the cost of the treatment would be-even with our insurance. Being retired and on a fixed income made it impossible to afford this medication. A resource helped me apply for financial aid through your Patient Advocate Foundation Co-Pay Relief Program and I was so grateful when you agreed to help fund my co-payment. Without your generosity, I would not have been able to afford this medication. So thanks to you I am once again enjoying my life and continuing to fight my cancer."*

Patrick M. | California | Multiple Myeloma

*"PAF helped me find relief from financial strains and I was able to get the right information to many questions. It's such a blessing to feel that I am not alone during these times."*

Clara R. | New York | Breast Cancer

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*In Memory of Sheila Crowe*  
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## CHARITY NAVIGATOR - 4-STAR RATING

Patient Advocate Foundation received its seventh consecutive 4-star rating from Charity Navigator, an honor bestowed on just 3% of all charities evaluated and the highest rating awarded to nonprofit organizations. Charity Navigator is the largest national nonprofit evaluator in the United States, having rated over 8,000 charities, with an aim of accentuating the work of efficient and transparent organizations.

“Attaining a 4-star rating verifies that Patient Advocate Foundation exceeds industry standards and outperforms most charities in their area of work,” Charity Navigator CEO and President, Michael Thatcher says. “This exceptional designation from Charity Navigator sets Patient Advocate Foundation apart from its peers and demonstrates to the public its trustworthiness,” he concludes.

To view PAF’s review, please visit the PAF Charity Navigator Profile at [charitynavigator.org](http://charitynavigator.org).

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*“This recognition is testament to the efforts of every member of our staff who work with individual patients every day to alleviate the practical burdens that arise as a result of illness, often impacting access to the most critical and basic healthcare services. Our organization maintains an unwavering commitment to the careful stewardship of the gifts and donations that make their work possible.”*

*Alan J. Balch, PhD  
Patient Advocate Foundation  
Chief Executive Officer*

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