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**Empowering Patients
Unlocking Insights from Foundation
& Grant Assistance Programs**

Jennifer Noonan, MSN, RN VP Clinical Strategy & Patient Engagement Accessia Health	Audrey Quartey Associate Director, External Relations Healthwell	Gina Russo, LCSW VP for Patient Services & Strategic Partnership Leukemia & Lymphoma Society
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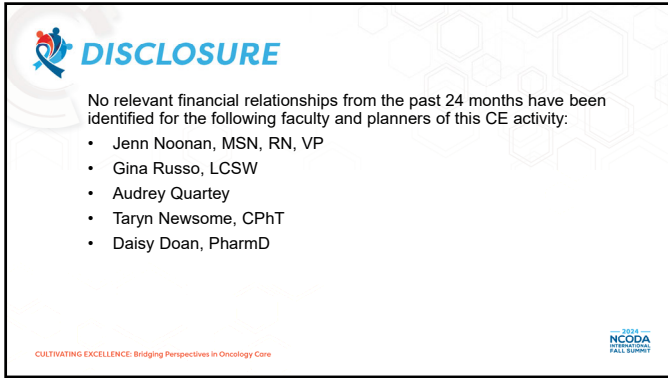
OBJECTIVES

1. Outline core patient assistance services, including specialized funding programs and social work support, to enhance access to care and improve patient outcomes.
2. Review comprehensive educational strategies for patients and pharmacy technicians including navigating clinical trial opportunities, managing medical debt, and offering support throughout the appeals process to ensure access to necessary treatments.
3. Discuss the impact of Medicare 2025 policy changes on patient access to medication expenditures, including commercially insured patients.

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DISCLOSURE

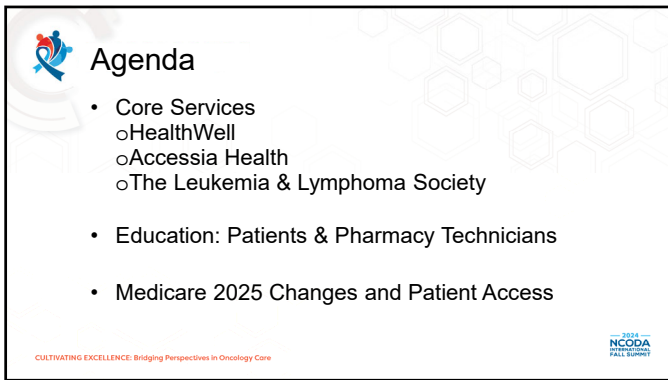
No relevant financial relationships from the past 24 months have been identified for the following faculty and planners of this CE activity:

- Jenn Noonan, MSN, RN, VP
- Gina Russo, LCSW
- Audrey Quartey
- Taryn Newsome, CPhT
- Daisy Doan, PharmD

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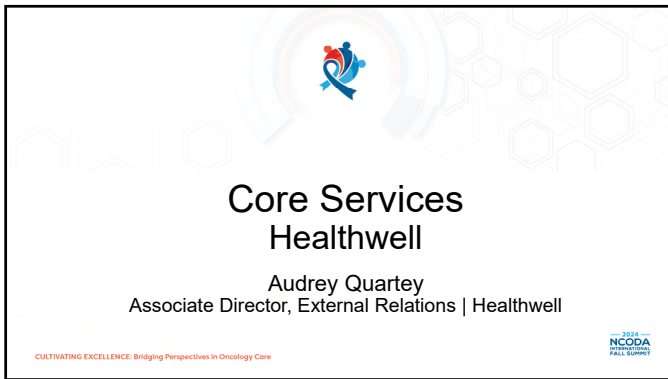
Agenda

- Core Services
 - HealthWell
 - Accessia Health
 - The Leukemia & Lymphoma Society
- Education: Patients & Pharmacy Technicians
- Medicare 2025 Changes and Patient Access

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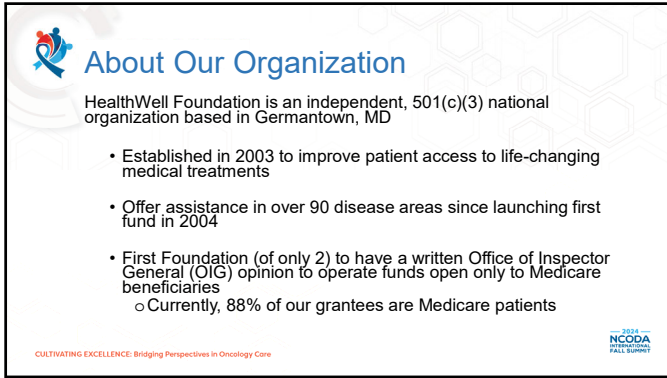
**Core Services
Healthwell**

Audrey Quartey
Associate Director, External Relations | Healthwell

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About Our Organization

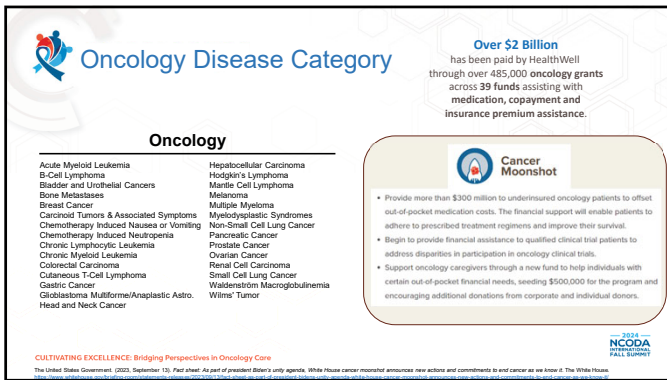
HealthWell Foundation is an independent, 501(c)(3) national organization based in Germantown, MD

- Established in 2003 to improve patient access to life-changing medical treatments
- Offer assistance in over 90 disease areas since launching first fund in 2004
- First Foundation (of only 2) to have a written Office of Inspector General (OIG) opinion to operate funds open only to Medicare beneficiaries
 - Currently, 88% of our grantees are Medicare patients

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Oncology Disease Category

Oncology

Acute Myeloid Leukemia	Hepatocellular Carcinoma
B-Cell Lymphoma	Hodgkin's Lymphoma
Bladder and Urothelial Cancers	Multiple Myeloma
Bone Metastases	Myelodysplastic Syndromes
Breast Cancer	Non-Small Cell Lung Cancer
Carcinoid Tumors & Associated Symptoms	Pancreatic Cancer
Chemotherapy Induced Nausea or Vomiting	Prostate Cancer
Chemotherapy Induced Neutropenia	Renal Cell Carcinoma
Chronic Lymphocytic Leukemia	Small Cell Lung Cancer
Chronic Myeloid Leukemia	Waldenström Macroglobulinemia
Colorectal Carcinoma	Wilms' Tumor
Cutaneous T-Cell Lymphoma	
Gastric Cancer	
Glioblastoma Multiforme/Anaplastic Astro.	
Head and Neck Cancer	

Over \$2 Billion has been paid by HealthWell through over 485,000 oncology grants across 39 funds assisting with medication, copayment and insurance premium assistance.

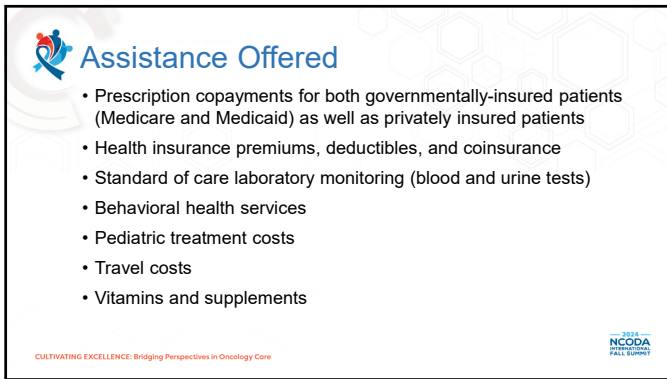
Cancer Moonshot

- Provide more than \$300 million to underinsured oncology patients to offset out-of-pocket medication costs. The financial support will enable patients to adhere to prescribed treatment regimens and improve their survival.
- Begin to provide financial assistance to qualified clinical trial patients to address disparities in participation in oncology clinical trials.
- Support oncology caregivers through a new fund to help individuals with certain out-of-pocket financial needs, seeding \$500,000 for the program and encouraging additional donations from corporate and individual donors.

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Assistance Offered

- Prescription copayments for both governmentally-insured patients (Medicare and Medicaid) as well as privately insured patients
- Health insurance premiums, deductibles, and coinsurance
- Standard of care laboratory monitoring (blood and urine tests)
- Behavioral health services
- Pediatric treatment costs
- Travel costs
- Vitamins and supplements

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Specialty Funds

Behavioral Health Services	Pediatric Treatment Costs	Vitamins and Supplements	Travel Costs
<ul style="list-style-type: none"> Cancer-Related Behavioral Health Emergency/Medical Workers Behavioral Health Oncology Caregivers Behavioral Health Fund <ul style="list-style-type: none"> Prescriptions Counseling services Psychotherapy Transportation 	<ul style="list-style-type: none"> Pediatric Assistance (Phone applications only) <ul style="list-style-type: none"> Acute Lymphoid Leukemia Autism Spectrum Disorder (ASD & ADHD) Diabetes Type 1 and 2 Congenital Heart Disease Convergence Insufficiency Covers: <ul style="list-style-type: none"> Prescription drugs Therapies Transportation 	<ul style="list-style-type: none"> Inborn Metabolic or Genetic Bile Acid Deficiency Vitamins and Supplements Alagille Syndrome Vitamins and Supplements Cystic Fibrosis Vitamins and Supplements <ul style="list-style-type: none"> Assistance for vitamins and supplements formulated to support treatment and management of the disease or condition 	<ul style="list-style-type: none"> Gout Travel Fund <ul style="list-style-type: none"> Assistance for travel related to obtaining treatment for gout General Travel Fund <ul style="list-style-type: none"> Assistance for travel related to the treatment and management of a disease for which a patient has an active grant at HealthWell in the past 18 months

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General Transportation Assistance

- Provide copayment assistance for travel expenses related to treating and managing a disease or condition
- HealthWell will provide up to \$500 in copayment assistance to eligible patients
 - Annual household incomes up to 500% of the federal poverty level
 - Must have an active grant 18 months prior to their application date
- HealthWell has partnered with Ride Health to provide transportation services to eligible grant recipients

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Cancer Moonshot Initiative

- Financial Assistance for Oncology Patients** – HealthWell will provide more than \$300 million in 2024 to underinsured oncology patients to offset out-of-pocket medication costs as part of the Cancer Moonshot initiative. The financial support will enable patients to adhere to prescribed treatment regimens and improve their survival.
- Clinical Trials** – HealthWell partnered with Family Reach to provide financial assistance to qualified clinical trial patients to address disparities in participation in oncology clinical trials.
- Oncology Caregivers Behavioral Health Fund**- Support oncology caregivers through a new fund to help individuals with certain out-of-pocket financial needs.
- Durable Medical Equipment (DME)/Home Health Care Services Fund** - Cover out-of-pocket costs for DME & home health care services for individuals with cancer (Launching late 2024)

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The Grant Process

- 1 Qualify**

To qualify for assistance, applicants must:

 - Have some form of health insurance (major medical or prescription drug)
 - Have an income that is less than 400 or 500% of the Federal Poverty Level
 - Be receiving treatment for a specific medical condition for which funding is available
- 2 Apply**


When applying for assistance:

 - Patients, caregivers, **pharmacy** and health care providers can apply online www.HealthWellFoundation.org/pharmacyportal or by phone at **(800) 675-8416**
 - Applicants receive instant notification of approval
- 3 Use Your Grant**

For our patients we offer:

 - Instant pharmacy card
 - Direct billing with providers and pharmacies
 - Eligibility to reapply after 12 months. Some funds offer the possibility of grant replenishment to patients who have exhausted all of their funds within 12 months

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QUESTION 1

What types of financial assistance does the HealthWell Foundation offer to patients?

- a. Vitamins and supplements
- b. Health insurance premiums
- c. Copays
- d. Pediatric treatment costs
- e. All the above

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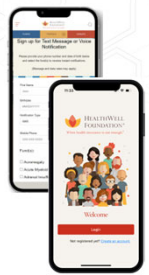
Empowering Patients

Patient Mobile App/Patient Portal – Existing patients can conveniently manage their grants by phone

- Key features:
 - Seamless Re-enrollment
 - Document Uploads
 - Payment Tracking
 - Fund Alerts
 - Add New/Existing patient(s)
 - Manage Your Grant(s)
 - Track grant statuses and action items

Real Time Fund Alerts

- Provide instant notifications through email, text or call so you can track the status of HealthWell's diverse portfolio of disease funds in real-time.



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HealthWell Mobile App - available on app store: <https://apps.apple.com/us/app/healthwell-foundation/id1514248122> | Android 10/14/24, Google Play: <https://play.google.com/store/apps/details?id=com.healthwellfoundation.us> | Android 10/14/24

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Educational Initiatives



Real World Health Care 2024 Series

Since 2013, RWHC has featured compelling content on health care issues affecting Americans. These features on the people and programs that are changing the way health care is delivered, to care services work, leading practices and clinicians, to profiles of patient advocacy organizations.

RWHC has provided valuable insights and information patient communication needs.

OUR IMPACT
25K+ Annual pageviews
50K+ Readers
300+ Blog posts

YEAR OVER YEAR GROWTH
50% User Visits
100% New Users
10% Page Views

Educational Videos

Patient Brochures

www.HealthWellFoundation.org

- Real World Health Care Blog**
 - 2024 Areas of Focus – Inflation Reduction Act, Cancer Moonshot and Type 2 Diabetes
- Videos, Webinars and Brochures**
 - Charitable Patient Assistance Program
 - Compliance
- Participate and moderate panels at various conferences:**
 - Asembia, Healthcare Advocate Summit, NCODA...
- Alliance Partner Network**
 - Partner with over 75 national nonprofits aligned with the disease areas we cover.

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QUESTION 2

What tool can you use to track the status of open and closed funds at HealthWell?

- Fund Tracker
- Fund Analyzer
- Real-Time Fund Alerts
- FundFinder
- Both A and C

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Core Services- Accessia Health

Jennifer Noonan, MSN, RN
VP | Clinical Strategy & Patient Engagement |
Accessia Health

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PROVIDING ACCESS TO ESSENTIAL HEALTHCARE

- Unique Approach to Patient Assistance
- 85+ Distinct Disease Funds Established
- Data-Driven Outcomes Measured
- Screening to Diagnosis & Throughout Patient Journey
- Focused on reducing health disparities and improving health equity and outcomes.
- Adhering to the highest standards of compliance and integrity.

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Accessia Health

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85+ Patient Programs

- 35-year history, \$1B+ in assistance
- Extensive knowledge of patient journeys
Going beyond co-pays with a **Holistic, Inclusive, & Outcomes-Focused** approach
- Strong connections in disease communities

Rare Diseases
Cancers
Hematologic
Metabolic
Cardiovascular
Respiratory
Neurological

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Accessia Health

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QUESTION 3

Which of the following factors do you believe is the biggest barrier to accessing financial assistance for complex health conditions?

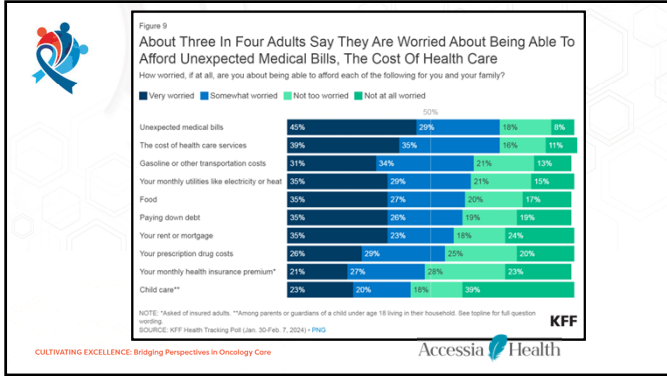
- a. Lack of awareness of available resources
- b. Complicated application processes
- c. Eligibility criteria that are too strict
- d. Insufficient funding or support availability
- e. All the above

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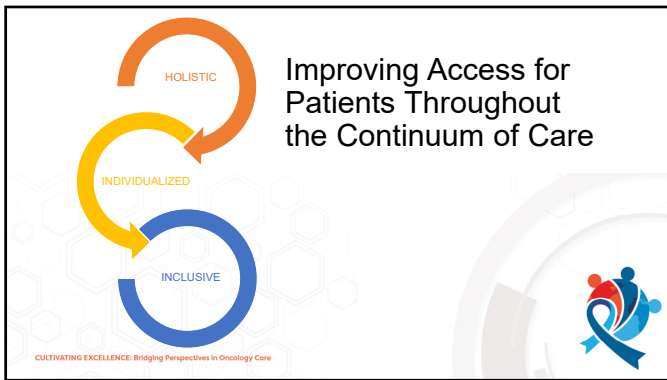
Accessia Health

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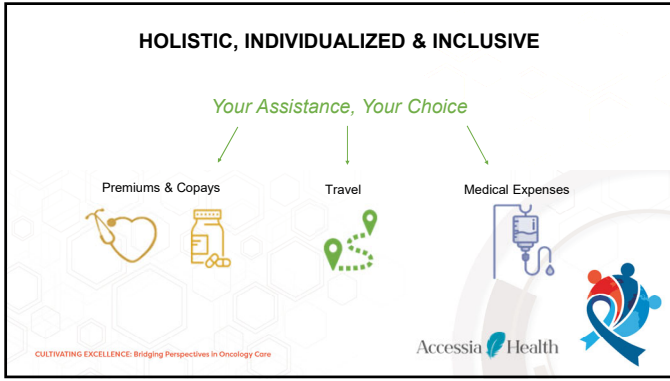
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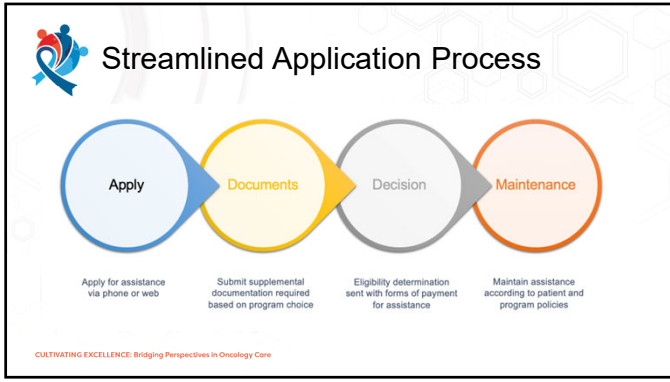
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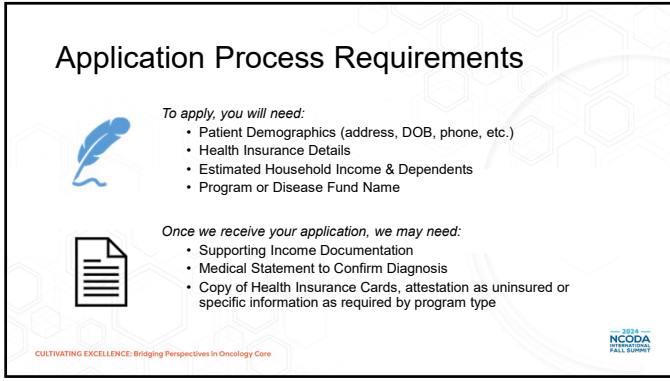
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Patient Assistance Resources

- **Accessia Health:** www.accessiahealth.org
- **Extra Help:** www.ssa.gov/medicare/part-d-extra-help
- **FundFinder Tool:** www.fundfinder.panfoundation.org
- **GoodDays:** www.mygooddays.org
- **Healthwell Foundation:** www.healthwellfoundation.org
- **NeedyMeds:** www.needymeds.org
- **NORD:** www.raredisease.org
- **PAN Foundation:** www.panfoundation.org
- **Patient Advocate Foundation:** www.patientadvocate.org
- **The Assistance Fund:** www.tafcares.org



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Core Services

Leukemia & Lymphoma Society (LLS)

Gina Russo, LCSW
VP for Patient Services & Strategic Partnership | Leukemia & Lymphoma Society



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LLS Mission

The mission of The Leukemia & Lymphoma Society® (LLS) is to Cure blood cancer and improve the quality of life of all patients and their families.



RESEARCH **EDUCATION & SUPPORT** **POLICY & ADVOCACY**



Leukemia & Lymphoma Society. <https://www.lls.org/>. Accessed October 8, 2024.

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360° Support

No piece of the circle is as meaningful without the pieces on the other sides. The circle must be complete—nothing missing—to offer 360° of support to people impacted by blood cancer.

EDUCATION & SUPPORT
Patient and Provider Education
Clinical Trials and Navigation
Patient Support and Assistance

ACCESS TO CARE

POLICY & ADVOCACY
Health Care Policy

RESEARCH
Research Career Development
Research Funding

People IMPACTED BY BLOOD CANCER

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**Leukemia & Lymphoma Society
Personalized 1:1 Support**

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NCODA
NATIONAL CANCER ORGANIZATION
FALL SUMMIT

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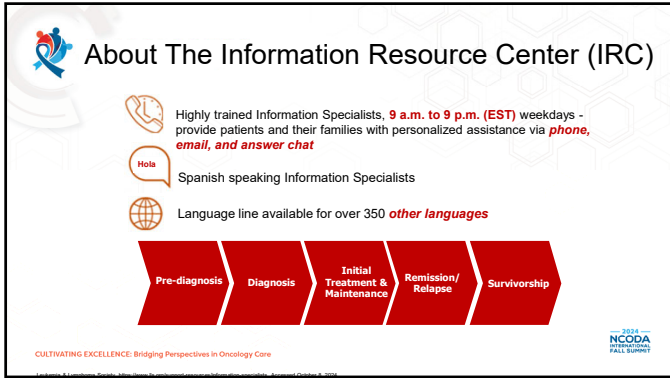
Information Resource Center (IRC)
The Hub of LLS Services for Patients, Families and Professionals

- Monday To Friday
- 9 A.M. To 9 P.M. EST
- Call: (800) 955-4572
- For live chat, email, or more information, visit WWW.LLS.ORG/IRC

- Speak one-on-one with an Information Specialist who can assist with information on cancer treatment, financial and social challenges and give accurate, up-to-date disease, treatment and support information
- Information Specialists Are Highly Trained
- Oncology Social Workers & Nurses

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About The Information Resource Center (IRC)

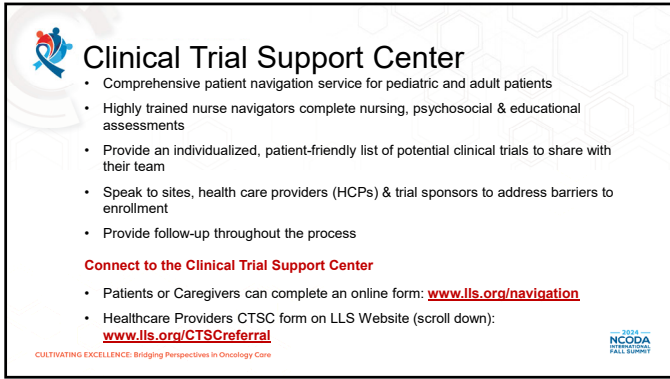
- Highly trained Information Specialists, **9 a.m. to 9 p.m. (EST) weekdays** - provide patients and their families with personalized assistance via **phone, email, and answer chat**
- Hola Spanish speaking Information Specialists
- Language line available for over 350 **other languages**

Pre-diagnosis | Diagnosis | Initial Treatment & Maintenance | Remission/Relapse | Survivorship

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Clinical Trial Support Center

- Comprehensive patient navigation service for pediatric and adult patients
- Highly trained nurse navigators complete nursing, psychosocial & educational assessments
- Provide an individualized, patient-friendly list of potential clinical trials to share with their team
- Speak to sites, health care providers (HCPs) & trial sponsors to address barriers to enrollment
- Provide follow-up throughout the process

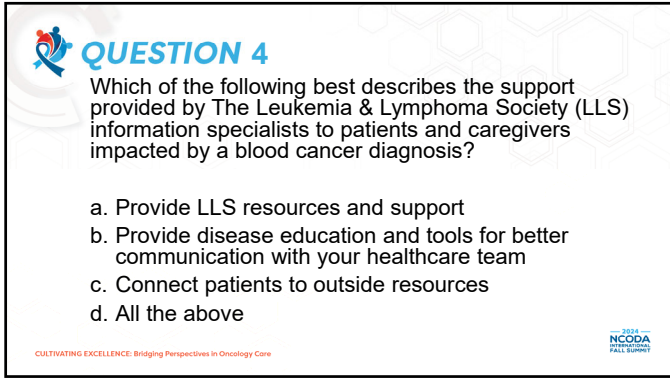
Connect to the Clinical Trial Support Center

- Patients or Caregivers can complete an online form: www.lls.org/navigation
- Healthcare Providers CTSC form on LLS Website (scroll down): www.lls.org/CTSCreferral

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QUESTION 4

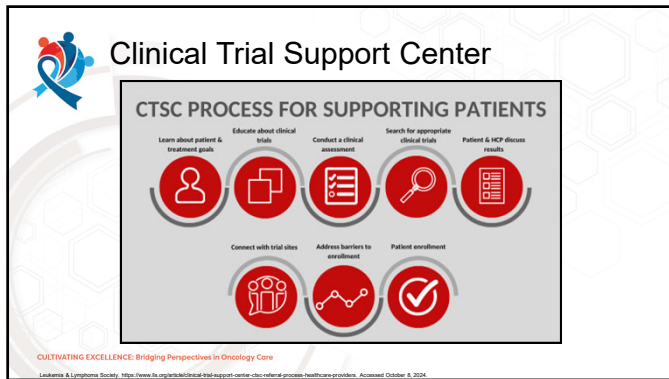
Which of the following best describes the support provided by The Leukemia & Lymphoma Society (LLS) information specialists to patients and caregivers impacted by a blood cancer diagnosis?

- a. Provide LLS resources and support
- b. Provide disease education and tools for better communication with your healthcare team
- c. Connect patients to outside resources
- d. All the above

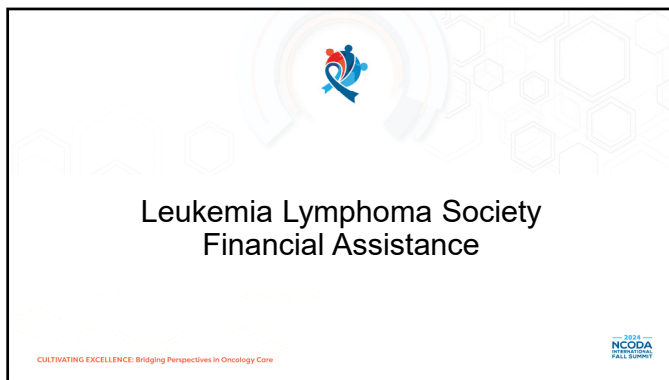
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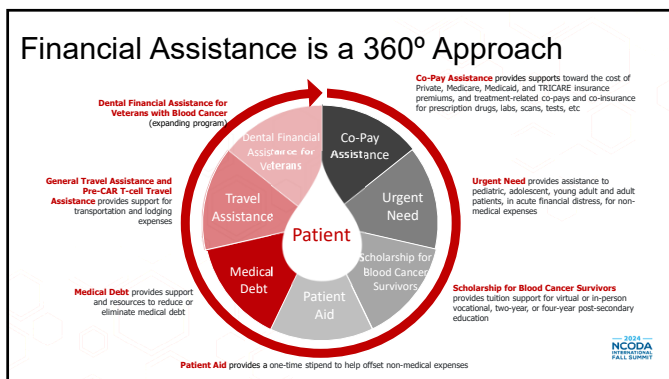
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LLS Co-Pay Assistance Program

MEDICATIONS

Chemotherapy* (oral or IV)
Treatment-related Supportive Care* (pain, anti-nausea, antibiotics etc.)
***Patients utilize the LLS Pharmacy Benefit Card**

INSURANCE PREMIUMS

Private & Medicare, Medicaid, TRICARE

SCANS, LABS AND TESTS

Treatment-related (EKGs, PET, CT, and MRI scans; ultrasounds; X-rays etc.)

INSTANT DECISION

Get a decision in real time & access funds immediately

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Financial Assistance Program Portals

ALL LLS PATIENT FINANCIAL ASSISTANCE PROGRAM APPLICATIONS CAN NOW BE ACCESSED ON ONE PORTAL!

Questions? Email: FinancialAssistance@LLS.org Toll Free Phone: (877) 557-2672

HCP Portal Highlights

- ✓ Submit multiple applications
- ✓ Attest to the diagnosis on the portal
- ✓ Get a decision instantly
- ✓ Access funds immediately via the LLS Pharmacy Benefit Card
- ✓ Submit claims and search claim status
- ✓ Link to patient accounts
- ✓ Upload documents
- ✓ View correspondence sent to patients
- ✓ See what's missing to complete application

Quick Search Tool - Available Now
Access current status of applications, award coverage period, award balances, claim submissions, and payment details **without logging into the portal**

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Access Step-by-Step Portal Guides

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LLS Patient Financial Support Programs

Patient Aid Program	<ul style="list-style-type: none"> • Offset non-medical expenses • No income requirement, patients can be insured or uninsured, or undocumented (must reside in U.S) 	<ul style="list-style-type: none"> • One-time, \$100
Susan Lang Pay-It-Forward Patient Travel Assistance	<ul style="list-style-type: none"> • Treatment-related transportation and lodging expenses, receive a Travel Credit Card • Income requirement, patients can be insured or uninsured 	<ul style="list-style-type: none"> • 6 months, \$500
Susan Lang Pre CAR T-cell Therapy Travel Assistance	<ul style="list-style-type: none"> • Patients who are being evaluated to receive CAR T-cell therapy as either standard treatment or a clinical trial • Treatment-related transportation and lodging expenses, receive a Travel Credit Card • Income requirement, patients can be insured or uninsured 	<ul style="list-style-type: none"> • 6 months, \$2,500
Urgent Need Program	<ul style="list-style-type: none"> • Patients in acute financial distress, "HCP must complete" • Offset non-medical expenses, received through a check • Income requirement, patients can be insured or uninsured 	<ul style="list-style-type: none"> • Yearly, \$500
Co-Pay Assistance Program	<ul style="list-style-type: none"> • Covers treatment related medical/pharmacy co-pays, premiums, co-insurance • Income requirement, patients must be insured • Can pay provider directly or reimburse 	<ul style="list-style-type: none"> • Yearly, Funding based on diagnosis

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QUESTION 5

The only time to assess for Financial Toxicity is when the patient/caregiver expresses concerns about paying their bill.

a. True
b. False

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Impact of Financial Toxicities

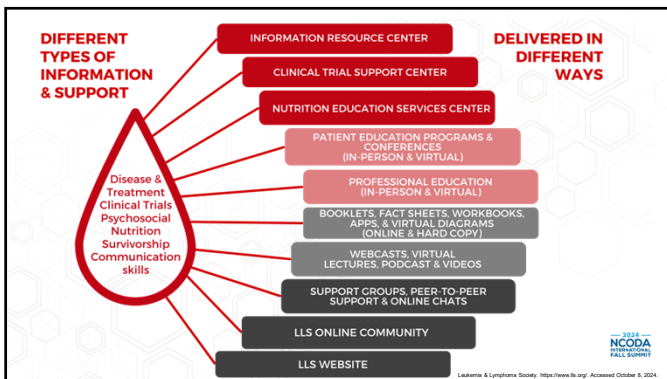
The 2016 Commonwealth Fund Biennial Health Insurance Survey indicated that 33% of insured adults aged 19 to 64 years had medical bill problems or accrued medical debt.

- Financial stress may increase if unable to return to work after finishing treatment
- Financial concerns can also contribute to difficulty maintaining adequate health and life insurance coverage
- Patients are often uncompliant with treatment due to financial concerns
- Coping Strategies
 - Investigate other sources of income if unable to return to work
 - Organize bills and rank them in order of importance
 - Make appeals to insurance company
 - Talk to creditors to create payment plans
 - Contact organizations that offer financial help to cancer survivors

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Medicare 2025 Policy Changes

- **Deductible Phase** - Patients are responsible for 100% of the prescription coverage until they reach \$590 in the Deductible Phase
 - Plans may vary especially with Medicare Advantage Plans, but deductible cannot exceed \$590
- **Initial Coverage** - Patients are responsible for 25% coinsurance for Medication on plan formulary until their maximum out-of-pocket of \$2000 is reached
- **Coverage Gap/Donut Hole** - No longer exists for patients
- **Catastrophic Phase** - After patients reach the out-of-pocket limit of \$2000, their medication copay will be zero dollars for the remainder of the year

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Impact of Medicare 2025 IRA Changes

- Every Medicare prescription insurance plan must have a **Medicare Payment Plan/M3P** also known as “smoothing”
 - Patients will have the option to opt into the Medicare Prescription Payment plan
 - Spread the cost of your payments for the year instead of paying the total lump sum
 - \$600 is the threshold at which your insurance carrier or pharmacy will notify you about the smoothing option
 - Once opted in, all your medication copays will be automatically spread for the remainder of the year
 - Beneficiaries will make the payment to the insurance carrier
 - Part B – Copay remains at 20%

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QUESTION 6

What is the maximum out-of-pocket for Medicare Part D in 2025?

- a. \$590
- b. \$8000
- c. \$200
- d. \$2000
- e. All the above

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Resources - Medicare Part D Changes

- Centers for Medicare and Medicaid Services (CMS) - www.cms.gov/inflation-reduction-act-and-medicare
- Medicare Website - www.Medicare.gov
- CMS IRA Factsheet - <https://www.cms.gov/priorities/legislation/inflation-reduction-act-and-medicare/lowers-health-care-costs-millions-americans>
- CMS IRA FAQs - <https://www.cms.gov/files/document/10522-external-faqs-about-inflation-reduction-act.pdf>
- Medicare Part D Improvements - <https://www.cms.gov/inflation-reduction-act-and-medicare/part-d-improvements>
- Medicare Prescription Payment Plan - <https://www.medicare.gov/prescription-payment-plan>
- Medicare Resources - www.cms.gov/inflation-reduction-act-and-medicare/resources-0

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IRA - Inflation Reduction Act

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QUESTION & ANSWERS

Empowering Patients Unlocking Insights from Foundation & Grant Assistance Programs

Jennifer Noonan, MSN, RN VP Clinical Strategy & Patient Engagement Accessia Health	Audrey Quartey Associate Director, External Relations Healthwell	Gina Russo, LCSW VP for Patient Services & Strategic Partnership Leukemia & Lymphoma Society
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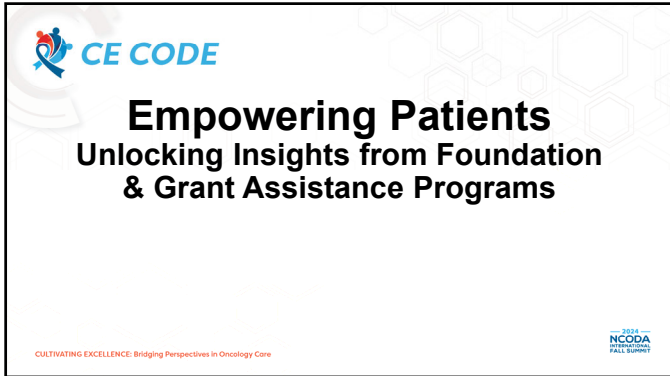
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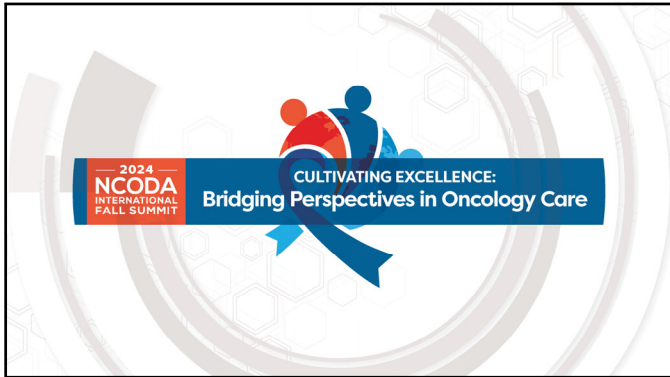
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