Save the Date in 2008

FEBRUARY

A Promise of Hope Affair
February 23, 2008
Town Center Marriott
Newport News, Virginia
www.promiseofhope.net

APRIL

2008-2009 Scholarship for Survivors
Application Deadline: April 16, 2008

JUNE

9th Annual Patient Congress
June 24-26, 2008
Washington Court Hotel
Washington, DC
www.pc.patientadvocate.org
“Please accept our most sincere thanks for your prompt, courteous, thorough and caring assistance you have provided us. We would highly recommend the Patient Advocate Foundation to anyone who is facing a life-threatening illness!”

— Sherri Sahs, on behalf of her father, Joseph Cavalieri, Bellevue, NE
MISSION STATEMENT

Patient Advocate Foundation is a national non-profit 501(c)3 organization that 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. Patient Advocate Foundation seeks to safeguard patients through effective mediation assuring access to care, maintenance of employment and preservation of their financial stability.
Table of Contents

A Word from Our
Chief Executive Officer 4

A Word from Our
President of the
Board of Directors 6

PAF Board of Directors 7

A Word from Our
Chief Operating Officer 8

PAF Direct Patient Services
A Word from Our
Chief Program Officer 12

Colorectal CareLine 18

Co-Pay Relief 20

Virginia Cares
Uninsured Program 22

LAF/PAF Partnership 23

A-B-C Initiative 23

Centers for Disease
Control Grants 24

Outreach 26

PAF in the News 28

PAF Publications 29

PAF Events
8th Annual Patient Congress 30

A Promise of Hope Affair 35

Financial Information
PAF Supporters 38

Financial Statements 43

PAF Staff 46

Acknowledgements 48

Save the Date  Inside Back Cover
A Word from Our Chief Executive Officer

HALLMARKS OF FISCAL YEAR JULY 1, 2006 THROUGH JUNE 30, 2007

Accelerated Acuity of Patient Issues, Financial Diversification and New Program Implementation

OUR PATIENTS SAY IT BEST....

“If it were not for Patient Advocate Foundation, my son would not have received the bone marrow transplant needed for his cancer.”

“My case manager at PAF was compassionate, professional and effective. Through her negotiations, the billing errors threatening to financially ruin my family were resolved and our bill of $33,860 was paid in full by our insurer.”

In the case of one family in North Carolina, a hospital bill of $408,000 at a major research facility went unpaid for five months. Through the Access-Benefits-Claims program introduced by PAF to hospitals, the claim was successfully paid in May 2007. A husband was diagnosed with an aggressive cancer three years ago when insured through his wife’s group health plan. In recent months, her employer illustrated clear signs of job discrimination including challenging her Family Medical Leave Benefits and threatening her with reduced work hours, which in turn would make her and her husband ineligible for life extending healthcare benefits. Through the intervention of PAF case managers and the pro-bono support of an employment attorney serving in the PAF National Legal Resource Network, this threat to access healthcare has been resolved.

Each of these cases touches the lives of every person serving on the team of PAF. Daily, we are reminded that the pain and paths of these patients could be our own at a moment’s notice, and we know that this response is universally shared by our financial supporters, non-profit agencies, physicians, hospitals, social workers, government agency referral sources and the patient community at large, who so generously invite the participation of PAF at their national meetings. Our friends in the national media including articles in US News and World Reports, The Wall Street Journal, The New York Times, The Los Angeles Times, The Houston Chronicle, as well as those in disease specific journals and community news, reporters have showcased the complexity of issues patients are confronting in accessing the medical care prescribed by their treating physicians for their life-threatening conditions. PAF has documented a year of accelerated cost shifting to patients with co-payment increases for medical services, medications, medical devices, and specific therapies, such as radiation. Of particular note, this fiscal year has seen increased reductions in annual caps for services. From one major retail employer, PAF documented hundreds of cancer cases with the annual cap for oncology benefits at $25,000 to $35,000. The results are insured patients with inadequate benefits who will not qualify for public programs such as Medicaid or charity services through ecumenical resources and community programs or many of the pharmacy assistance programs, since many of these agencies and programs target their support for uninsured persons.

The acuity of cases moved the average number of case contacts to resolve a patient’s case from 5.8 contacts in FY2005/2006 to 11 contacts in FY2006/2007. Each case required more time to resolution and with each
passing day, diseases are advancing and eligibility of treatment protocols prescribed are threatened. The cost for each patient case internally accelerates, also. Within the area of acuity was the issue of patients being denied treatment based on health plans that challenged the underwriting application, charging that the diagnosis was a pre-existing condition. Our most extreme case involved a 40-year old breast cancer patient in Texas. Because she had taken a prescription drug for acne when she was 17 years old, the plan contended her development of cancer was pre-conditioned. While the case was favorably resolved, it took an extensive amount of time. For each day in negotiation, she lost a day for treatment.

Our annual report highlights our achievements at being named one of the top 25 Employers in the Hampton Roads area of Virginia; the establishment of our Med Care Program; the approval of our Virginia Cares Program supported by the Governor and Secretary of Health of Virginia with the General Assembly of Virginia appropriating our annual contribution; The Centers for Disease Control selecting PAF to be featured in the first internal CDC newsletter that highlighted the work of organizations the CDC supports; the expansion of our staff to support new program growth; and expansion of our hospital and physician practice contracts through our Access-Benefits-Claims Initiative.

I invite you to enjoy the personal accounts of PAF leaders, who will summarize our fiscal year in operation, programs, and outreach initiatives. Each experience reported is shaped by the patients we serve, the Boards of Directors’ commitment, coupled with the implementation of PAF team members, collaborating partners nationwide, as well as the fractures in our nation’s healthcare delivery system.

Hamilton Jordan, former White House Chief of Staff for President Jimmy Carter recounted in his book: *No Such Thing as A Bad Day* that he was shaken up by a doctor friend of his who flew in to see him when he was first diagnosed with cancer at the age of 27 years old when he said “Old friend, you have got to take charge of your own medical care.” Jordan recounts that he asked, “Don’t I have enough to worry about? You mean I have to be responsible for the medical decisions?” to which his friend replied, “That is exactly right. Tell me who has a greater stake in the decisions being made than you do?” We know that without access to treatment, medicines, clinical trials and financial support, the decisions being made may not be in the best interest of the patient.

It is our privilege to be included on the personal journeys of so many brave and bold patients responding to this challenge. We take pride in being able to share with you today a memorable glimpse of the past year and of all those we helped along the way.

With sincere gratitude and appreciation,

Nancy Davenport-Ennis
CEO/President
PATIENT ADVOCATE FOUNDATION IS ENTERING ITS TWELFTH YEAR

with continued growth to meet the increasingly complex challenges of Americans needing access to health care and related services while facing serious or life-threatening illnesses.

Let’s do some numbers: We have served more than twenty million Americans since our inception. Last year we provided direct case management services to almost 40,000 individuals. PAF Co-Pay Relief Program has served over 12,000 people since opening in April 2004. In the past year, we have opened a new Colorectal CareLine to offer services and support for patients with colorectal cancers. The PAF staff has grown from 78 to 99 members, an increase of 26.9 percent.

But numbers cannot tell the whole story: What I wish I could report to you is the enthusiasm and commitment of our individual staff members as they face their daily mission of providing direct services to so many people in need. To watch them at their work in the Newport News center truly is heartwarming. Founder and CEO Nancy Davenport-Ennis, Jack Ennis and the rest of the management staff have provided extraordinary vision and leadership to the organization. It is no wonder that PAF recently was voted as one of the “Top 25 Best Places to Work in Hampton Roads.” The staff members’ passion is poured into the quality of services received by patients.

Part of the PAF story features the active engagement of our Board of Directors who has provided exemplary service to PAF over the last year. Sheldon Weinhaus has served on the Consumer Advocates in Research and Related Activities (CARRA) as an advisor to the National Cancer Institute. Delegate Phil Hamilton and Rene Cabral-Daniels were both instrumental in helping PAF procure a grant through the Governor and Secretary of Health offices of Virginia that was approved by the Virginia General Assembly to implement and support the Virginia Cares Uninsured Program. Dr. William T. McGivney helped PAF establish the process for PAF to partner with hospitals nationally to provide services to resolve access to care and reimbursement issues. I would like to recognize Dr. Roy Beveridge for his service as Advisor to the Board of Directors over the last year and I would also like to thank the many members of our Scientific Board of Directors who have provided testimony to the FDA, the Centers for Medicare and Medicaid Services and the Medicare Evidence Development & Coverage Advisory Committee (MedCAC). Additionally, Rich Carter and Sheldon Weinhaus have again provided their professional legal services to PAF patients who needed that additional support.

The rest of the story comes from the patients themselves: Every day, PAF hears from individual Americans expressing their gratitude for the life transforming (and sometimes life-saving) help they have received. All of these services have been provided at no charge, thanks to the generous support of our donors and patrons.

On behalf of the Board of Directors of the Patient Advocate Foundation, we salute the leadership, staff, patients and supporters who make up the PAF family. Together, we all contribute greatly to improving the health care system for patients whom we serve.

Edward G. Connette
President, Board of Directors
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Pearl Moore, RN, MN, FAAN
Dear Friends,

A commitment to excellence, and nothing less, is an appropriate description for what I experience each day I serve as Chief Operating Officer. Staff members are committed to PAF because PAF is committed to them. Executive Board of Directors show their commitment to excellence by giving their time, energies, and wisdom selflessly so they might better help shape the future of this Foundation. A shared sense of excellence from our local and national partners is demonstrated in the time they so generously give and the valuable resources offered that help support our mission and grow our programs and services. Striving to reach higher levels of excellence and increasing demand for our services in the marketplace are reasons that motivate PAF to work day in and day out to ensure our programs and services are available to all who need them.

FY2006/2007 has again proven to be an exciting time for Patient Advocate Foundation, the entire staff, Board of Directors and local and national partners. We just completed our 11th year and it is never far from my mind and heart, our humble beginnings in 1996 when we opened our first office, 10 by 10 feet of office space in Newport News, Virginia. Only six years later in February 2002, the demand for PAF Direct Patient Services reached a new height and in order to accommodate our expanding staff, our small office relocated to a 10,000 square-foot office building, now proudly referred to as national headquarters. In October 2005, the success and growth of the Co-Pay Relief Program (CPR) prompted another expansion that added another 5,000 square-feet of office space. January 2007 was another exciting year with the official launch of the Colorectal CareLine (CCL), which, as anticipated, grew our staff yet again and expanded our office space by another 5,000 square feet. These growth spurts and office expansions have been the result of healthcare consumers embracing the mission of Patient Advocate Foundation: to serve chronically ill patients who are in need of access to healthcare. As the need for our services increased, local and national community supporters rose to the challenge by creating partnerships with PAF that would help ensure sustainability of the PAF programs and services.

In order to ensure quality and timely service to all patients nationwide, PAF continues to make personnel expansions a top priority in each budgeting cycle. It is our goal to direct a significant portion of funding to expand current and future personnel for the Direct Patient Services Division. During FY2006/2007 the PAF staff approached the 100 employee mark, ending the year with 99 employees, many of which have expertise in Nursing, Certified Coding and Billing, and Social Work. We have increased the Case Management staff, including those in CCL, by 37.9% and staff members in the Co-Pay Relief Program by 28%. Those increases represent the growing need for PAF programs and services. Thus, the Direct Patient Services Division that admin-
isters case management, CCL and CPR programs combined have grown by 33.3% this fiscal year alone. Consequently, the overall PAF growth rate in FY2006/2007 was an amazing 26.9%.

My proudest moment this year came in June 2007 when Inside Business, a regional business trade publication produced by the Virginian Pilot, named PAF a “Top 25 Best Places to Work” in Hampton Roads, Virginia. This prestigious award recognized PAF for continuously investing in our employees. Selection criteria were based on the culture/personality of the organization, the family-friendly environment, competitiveness of compensation and benefit packages, and overall employee development. Because PAF was founded on the principal of helping others, this award confirmed that our help begins from the inside out. I feel truly honored that our employees have chosen to call PAF home.

PAF continues, each day, to strive for excellence by serving those in need. Our successes are chronicled daily by surveys and letters that offer valuable feedback and praise directly from patients we have had the pleasure to serve. By rewarding our staff for their loyalty and dedication, we created a work environment that is in some ways superior to others. We have been fortunate to develop long-standing relationships with Partners in Progress, local and national community leaders, representatives of various national non-profit organizations, friends and those we consider family. These relationships have contributed to our continued expansion and the success of our programs and services. I am ever grateful and celebrate the empowerment that has been bestowed upon PAF through these relationships.

It is my pleasure to share with you our progress through the past year, our growth, and even a few of the faces and voices of people we helped along the way. I look forward to next year, one that undoubtedly will again represent PAF’s true commitment to excellence and to helping those in need.

With gratitude,

Fran Castellow, MSEd.
Chief Operating Officer

Just when I gave up hope! I found a person who cared. I have ALL leukemia and diabetes and I’ve called a lot of different places for help but none has been as helpful and kind. Just when you think people don’t care, (you) find a person that cares. It gives hope and faith. And it let you know there are people who care. I thank Patient Advocate Foundation for people employed that really care. God Bless.”

— James Crider
Olive Hill, KY
Patient Advocate Foundation named one of the “Top 25 Best Places to Work in Hampton Roads” for 2007 by Inside Business

In June 2007, Patient Advocate Foundation was named a top 25 best place to work in Hampton Roads for 2007 by Inside Business, the Hampton Roads Business Journal published by the Virginian Pilot. PAF has 99 employees principally in the Hampton Roads, Virginia headquarters office and six satellite offices throughout the nation in California, Florida, New York, and Iowa.

Annually, Inside Business recognizes 25 local employers who make a significant investment in their employees. The publication invited Hampton Roads businesses to compete in their Top 25 Best Places to Work competitive application process. The applications are then turned over to a panel of independent judges with knowledge in human resources management and employee satisfaction. Judges then award points in four different categories: culture/personality, family-friendly environment, compensation, and employee development. The ratings are averaged and a total score is decided for each company. The 25 companies with the highest scores are the winners.

“I congratulate each of our employees for helping us earn this honor. They are the reason PAF is one of the best places to work in Hampton Roads,” said Nancy Davenport-Ennis, President and CEO of PAF. Inside Business, in their own words, also congratulated PAF on a job well done, and hopes that as an example, PAF will provide other employers with helpful ideas of how to grow and support a business’s best asset...the employees!

PAF Family Night at the Peninsula Pilots Baseball Game

June 8, 2007

Each year, PAF hosts an event for staff and their family members to provide the opportunity for our families to meet each other. Events such as the Family Fun Night are one of the reasons that PAF was selected as one of the top 25 places to work in Hampton Roads, Virginia.

On a very hot Friday evening in June, 98 PAF employees and their family members attended the PAF Family Night at the Peninsula Pilots baseball game. PAF had an area all to themselves as they enjoyed a dinner of BBQ, coleslaw and baked beans. The players also came over to sign shirts, baseballs and hats for the children in attendance. The Peninsula Pilots defeated the Thomasville Hi-Toms 6-5 in an eleven-inning game.

Not wanting the satellite offices to be left out of PAF Family Night at the Ball Game, tickets were purchased for them to attend a local game in their area. Between the Florida, Iowa, California and New York offices, an additional 30 employees and their families attended a ball game, proudly wearing their PAF All Stars shirts!
I want to thank you for your help. God forbid, if one of my friends or family members are ever in this position, I will certainly tell them about PAF.

Amy Bruggeman
Dear Friends,

When I began working with Patient Advocate Foundation in 2000, I could never have foreseen the phenomenal increase in demand for the services we provide which have resulted in the implementation of eighteen unique patient programs and initiatives which are currently housed under the office of the Chief Program Officer. It is through the dedication and perseverance of our case managers, call counselors, outreach coordinators, Board members, Executive leaders and financial partners that PAF has been able to respond to the shifting healthcare access needs brought to us by the patients we serve every day. Through the establishment of programs and recruitment of experts who address the evolving needs of diverse and often vulnerable populations, PAF consistently maintains high quality service levels, while never deviating from our original mission of ensuring that all Americans have access to quality healthcare. I am inspired by the courage of our patients and awed by the excellence of my colleagues who seek to remove practical burdens that plague a patient’s journey back to wellness. I am grateful that I have an opportunity to share this personal reflection of PAF’s 2006-2007 fiscal year with you now, as again the organization has risen to meet the challenges of our patient’s needs.

This year has seen the patient services division expand their hours of service to provide live assistance from 8:00 AM – 8:00 PM EST Monday through Friday, representing a significant commitment to our patients who are benefiting from this 38% increase in service availability. Patient needs were also carefully considered when, in March of 2007, we restructured the internal case management response flow, creating a mechanism that allows new callers to receive an immediate response from a member of the patient services team.

This year PAF has further strengthened the comprehensiveness of their patient service offerings with the addition of a Med CareLine division that partners clinical specialists with patients who are seeking access to emerging treatments and therapies. The launch of the Colorectal CareLine in November 2006 represented PAF’s first formal foray into the provision of specialized case management services for targeted patient needs surrounding newly approved treatments and therapies. The Colorectal CareLine is staffed by a dedicated team of nurse case managers and social workers who provide assistance to colorectal patients nationwide via a toll free patient/provider hotline. These case managers negotiate reimbursement for clinical trials, work to resolve insurance denials for off label drug indications, resolve coding and billing disputes involving newly approved treatments and therapies.
therapies and provide initial interpretation of a patient’s benefit language. The Colorectal CareLine also established the Financial Aid Fund, a small financial assistance grant program for colorectal patients in need of debt crisis assistance, related to their colorectal diagnosis.

The number of uninsured Americans turning to PAF for direct support in obtaining medical care has again increased over this twelve month period. Patient data reflects that in FY2006/2007 26.04% of PAF patients were uninsured while an additional 10.76% were Medicaid beneficiaries. While PAF has served the uninsured and underinsured on a national level since inception in 1996 and partnered with the Centers for Disease Control and Prevention in 2003 on a multi-year project to increase the survivorship of cancer in underserved populations, FY2006/2007 saw the organization partner with the state of Virginia. This partnership launched the Virginia Cares Uninsured Program (VCUP), which was designed to support social service and healthcare agencies by providing comprehensive, sustained case management services to uninsured residents with chronic and life-threatening diseases. The VCUP team will conduct extensive outreach to free health clinics, Virginia Department of Health offices and rural hospitals and medical facilities to promote the availability of PAF services and encourage referrals of uninsured patients to the VCUP hotline, where case managers will work to navigate healthcare access and reimbursement options for these callers.

As our country struggled to provide adequate healthcare options for its citizens, the media shone a bright spotlight on many patient access issues in FY2006/2007, frequently seeking out PAF to weigh in on these issues. PAF was featured in national publications such as U.S. News & World Report, Prevention, Women & Cancer and Coping with televised coverage on CNN’s House Call with Dr. Sanjay Gupta, resulting in thousands of media generated patient referrals.

Every time I read a patient’s letter thanking PAF for eliminating the desperation they felt when encountering roadblocks and strife during an illness that had already sapped their strength and spirit I feel privileged to be a part of this organization. Without the unwavering support of our partners who devote their energy, resources, talents and funding, PAF would not be here to assume those patient burdens or to provide that financial aid to a patient with no other option. I thank you all for your commitment to PAF and your clear recognition that what we do truly makes a difference.

Warmest Regards.

Beth Darnley, CPO

"The family of Patient Advocate are angels sent from God. The concern, care and compassion extended to me has lifted a burden from my heart. What a sigh of relief! May God bless all who serve in this great foundation helping those reaching out for assistance."

— Joanne Lombardi
El Segundo, CA
FOR OVER 11 YEARS, PATIENT ADVOCATE FOUNDATION has had the privilege of assisting patients with access issues through our professional case management staff, the Co-Pay Relief (CPR) staff and now the Colorectal CareLine staff, that are, together, the PAF Direct Patient Services Division. From serving 157 patient contacts in 1996 to serving 39,462 patients in FY2006/2007, PAF has remained true to its mission of safeguarding patients and eliminating barriers to healthcare access.

In the spirit of continual evolution and enhancement of the Direct Patient Services Division, PAF introduced the Live Call Program during FY2006/2007. This program enables all patients contacting PAF requesting direct assistance via the toll free number to be placed in contact with a professional case manager at the time of the initial call. This process eliminates the possibility of a patient never receiving service due to missing a call back from a case manager. The PAF Direct Patient Services Division has received excellent feedback from the patients as they feel they are receiving competent, immediate responses to their needs. As well, the Direct Patient Services Division is reporting 307,619 contacts on behalf of patients to bring resolution to their access issues. This averages 11 contacts from a PAF professional case manager to a relevant stakeholder in the patient case, including, but not limited to, the patients’ healthcare providers, social workers at governmental agencies, employer representatives, creditors and/or other representatives from non-profit social service and healthcare organizations in order to bring resolution to the patient issues for each and every case handled by the Direct Patient Services Division staff.

PAF Direct Patient Services Division provided 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

### Summary of Patient Cases and Contacts

- **New Case Count**: 27,242
- **Re-Opened Case Count**: 1,139
- **Total Email Contacts for Direct Patient Services**: 11,081
- **Total Patient Case Count**: 39,462
- **Total Contacts for Case Resolution**: 307,619

### Summary of Internet Patient Services Provided

- **Live Web Assistance Chats**: 426
- **Web Browser Hits/Views**: 6,225,671
- **Total Internet Patient Services**: 6,226,097

### FY2006/2007 Direct Patient Services Division Summary

- **Total Patient Contacts for Direct Patient Services**: 6,533,716
- **Total Patient Case Count**: 39,462
- **Total Contacts for Case Resolution**: 307,619
Patient Advocate Foundation receives requests for services via email, telephone and websites, www.patientadvocate.org, www.copays.org and www.colorectalcareline.org. There are more than 15,000 links from non-profit organizations, governmental agencies, educational facilities and corporations on the PAF website. Likewise, the PAF site is linked to over 1,600 educational websites, offering instant access to PAF website visitors to a wealth of pertinent information. Total website visitors increased 6% over the same period last year. The total number of web based views, hits and contacts for educational information totaled an additional 6,225,671; this is an 11.3% increase in web utilization over last year.

As well in FY2006/2007, PAF received 11,081 requests for patient assistance and service via the Internet Patient Services Division, including 426 live Web Chats with PAF professional nurse case managers. All requests for assistance made via email are responded to by professional case managers offering resources and direct assistance to those patients. Of the 11,081 email requests and 426 live Web Chats, an estimated 25% came from healthcare professionals, a clear indication that PAF and its resources have become a valuable tool for those working on behalf of patients and their access to care.

In summary, there were just over 6.5 million requests for direct patient services and educational information via phone contact with a PAF professional staff member, personalized email assistance, live web chat assistance or website visits during FY2006/2007.

**DIRECT PATIENT SERVICES DIVISION:**

**WHO ARE OUR PATIENTS?**

As we work with patients requesting our assistance, we capture approximately 200 fields of data on each patient. From this data we create the Patient Data Analysis Report (PDAR) on an annual basis to determine what populations we are serving and what patient issues are becoming trends in various regions of the country. As we do each year, we have provided some of the data from the comprehensive PDAR in the context of this annual report in graphical form.

In FY2006/2007 62.34% of the patients served were female while 37.66% were male, demonstrating 2.66% increase in the male population over last fiscal year. We served patients of all ages with 4.67% being in the birth to 25 age range, 20.96% were aged 26-45, and nearly half, 49.52%, of the PAF patients were between the ages of 46 and 65 years old. Patients who are over age 65 represented 24.85% of the PAF patient population in FY2006/2007. Likewise, we assisted patients of many ethnicities with 72.21% of patients classifying themselves as White/Caucasian, 15.9% considered themselves Black or African American and 8.9% were Hispanic/Latino. We saw a 2.79% decrease and 1.35% increase in the White/Caucasian and Black/African American populations respectively this year over last, while seeing an increase in the Hispanic/Latino population of 0.76%. Ethnic demographics of our patient population are largely consistent with the statistics presented in the Census Bureau’s 2005 American Community Survey that reported the US Population as being 74.7% White American, 14.5% Hispanics of any race, 12.1% Black American, 4.3% Asian American, 0.8% American Indian, 0.1% Native Hawaiian or other Pacific Islander, 6% some other race and 1.9% two or more races.
The top ten states that our patients came from in FY2006/2007 were Florida (17.24%), Texas (13.56%), California (12.67%), Georgia (10.93%), New York (8.65%), Ohio (8.03%), Pennsylvania (7.95%), Virginia (7.54%), North Carolina (7.33%) and New Jersey (6.10%). This data was relatively consistent with FY2005/2006 with the one exception of Tennessee being replaced by New Jersey in the top ten for FY2006/2007. The states from which our patient cases originated appear among the top 12 states on the US Census Bureau’s July 1, 2006 estimates of population density.

Patients find their way to PAF in a multitude of ways as PAF has become a reliable referral source for non-profit social service and healthcare organizations, governmental agencies, including the field and national offices of members of the United States Congress, providers’ offices, clinics, hospitals and media outlets. In FY2006/2007 referrals from American Cancer Society and Lance Armstrong Foundation (LAF) represented 55.54% of the PAF patient population. These are natural referral sources as PAF and LAF have a formalized partnership through the LAF LiveStrong SurvivorCare Program. Likewise, American Cancer Society is the nation’s largest cancer organization, thus, thousands reach out to them annually for assistance. Referrals from patient’s friends, doctors, medical social workers as well as the Internet, Cancer Care, American Heart Association and the PAF Co-Pay Relief Program round out the top ten referral sources for FY2006/2007.

Cancer continues to be the primary diagnosis of PAF patients with 78.71% of all patients served reporting a diagnosis of cancer. Breast Cancer (37.48%) was the leading cancer diagnosis among our patients again this year with Lung Cancer quickly following at 14.15%, Colon Cancer at 12.13% (a 5% increase from last year), Male Reproductive System Cancers at 8.54%, Female Reproductive Cancers at 7.69%, Lymphoma at 7.24%, Brain Cancer at 4.23%, Leukemia at 3.57%, Pancreatic Cancer at 2.59% and Hodgkin’s Disease at 2.38%.

The cancer population served by PAF in FY2006/2007 was relatively consistent, in number, from FY2005/2006 when the rate was 79.37%. The remainder of the top ten diagnoses of PAF patients for FY2006/2007 includes Chronic/Debilitating Conditions (10.25%), of which there are over 100; Cardiac Conditions (5.87%); Screening for Symptoms (1.54%); Pediatric Disorders (1.31%); Multiple Sclerosis (0.73%); Kidney Related Diseases (0.64%); Organ Transplantation (0.37%); Lupus (0.34%), and Parkinson’s disease (0.23%).

Of the patients served in FY2006/2007, 73.96% had some form of insurance. It was reported that 41.28% of the patients served by PAF were privately insured, 10.76% were receiving Medicaid and 21.92% were covered under Medicare. This data represents a 2.08% decrease in the Medicare patients served this year versus last. As well, 26.04% of all PAF patients in FY2006/2007 reported being completely uninsured; this represents a 2.04% increase in the uninsured population from the previous year.

Patients who contact PAF have a wide variety of needs and are offered services that have breadth and depth that are currently unmatched.
FY2006/2007 the top five primary issues patients were seeking assistance with included Insurance Issues, Uninsured Issues, Debt Crisis Issues, Disability Issues and Employment Issues. PAF continues to be a recognized as a leading resource when confronted with access issues; this is evidenced by nearly 50% of all of the PAF patients requesting assistance with insurance issues including coding and billing errors, prescription drug and medical service access issues, denial of access to a clinical trial, co-payment assistance, and assistance with Medicare Part D plan selection and enrollment.

Patient Advocate Foundation staff, specifically those within the Direct Patient Services Division, feels honored to have the opportunity to serve patients in their time of greatest need. The staff truly is a team of professionals helping people access healthcare.
A DIAGNOSIS OF COLORECTAL CANCER CAN CREATE A FEELING OF PANIC as patients face a diagnosis that can potentially impact all aspects of their lives. People living with cancer, their caregivers, and their families find themselves trying to navigate intricate healthcare systems that are confusing and overwhelming. Patients often wonder, “Where do I start?” They find themselves wondering how their diagnosis will affect their employment and insurance status, their financial security and their family’s global well being. As a result of unexpected illness many patients find themselves trying to understand and interpret complicated benefit and/or legal provisions such as Social Security Disability benefits and employment protections provided under the Family Medical Leave Act. Underinsured and/or uninsured patients are often faced with delayed or total lack of access to care, personal assumption of large medical debt and a maze of patient assistance, charity care and/or Medicaid applications to handle alone during a physically vulnerable time.

Reaching out for help is one of the most important steps a person living with cancer can take. In November 2006, PAF launched the Colorectal CareLine (CCL), a patient/provider hotline, designed to provide sustained...
assistance to patients nationwide who have been diagnosed with colorectal cancer and are seeking educational resources, direct assistance with access to care issues and/or financial aid for select patient needs. CCL nurse case managers and social workers can help patients successfully navigate the road to recovery by working on their behalf to address healthcare obstacles and financial issues thus reducing patients’ sense of isolation. The CCL case managers act as a liaison between patients living with cancer and their insurers, employers and/or creditors to ensure successful resolution of the practical issues facing patients today.

The words of Catherine Stevens, a patient served by the Colorectal Careline convey the necessity of this comprehensive program best: “My experience with your CCL program provided an affirmative response to a financial crisis. Colon cancer is perceived as an indelicacy, an offensive thing, and your empathetic counselor sought out all pertinent resources. Cancer is such an elusive, frightening disease and I found it enormously encouraging to realize that I could get help.”

The Colorectal CareLine also has a small financial grant component for colorectal patients in need of debt crisis assistance for expenses related to out of town care. Patients are asked to provide a verification of diagnosis as well as a documented need for financial assistance and income verification. The CCL Financial Aid Fund currently provides one-time grants in the amount of $200.00 to eligible patients who have a diagnosis of colorectal cancer and earn $75,000 or less regardless of family size.

There’s no adjective to describe your foundation. [I] could not put into words how I feel and the wonderful experience I had with the Patient Advocate Foundation.

Maggie Rosado
Escondido, CA

I was helped by the PAF, which has helped my financial problems and my medical bills immensely. It has also given my wife and I hope for my battle with this cancer. We both thank you from the bottom of our hearts

Tran Kieu
Dallas, TX

Our experience surprisingly has been so very helpful and life saving. The need for health insurance is paramount. The debt cancellation will save us from financial devastation.

Stephen Coll
Hammonton, NJ

Patients and providers can contact the Colorectal CareLine toll-free at 1-866-657-8634 to initiate a request for assistance or can visit www.colorectalcareline.org. The Colorectal CareLine team can assist with the following:

> Navigate through the reimbursement system, including initial interpretation of patients’ benefit language
> Provide direct appeals assistance
> Provide educational resources, including disease specific literature, managed care information and financial resource information
> Provide referrals and linkage to appropriate educational resources
> Provide clinical trials education and conduct clinical trials screening
> Provide referrals to appropriate co-payment programs, including PAF Co-Pay Relief
> Network patients to all known local, state and/or national resources for financial assistance
> Provide case management services to uninsured patients, ensuring access to care and enrollment into Medicaid and/or charity care programs, when appropriate.
PAF HAS COMPLETED ITS THIRD YEAR of the operation of the Co-Pay Relief (CPR) program. The program was established in April 2004 to provide financial assistance for insured patients who qualify medically and financially with the cash co-payments for their prescription drugs. CPR is one of eighteen programs offered and administered by PAF to assist patients in accessing quality healthcare. The program operations were awarded a favorable ruling from the Department of Health and Human Services Office of the Inspector General (OIG) on October 29, 2004. The OIG issued ruling #04-15 provides protection to those donors who participate in CPR.

FY2006/2007 PROGRAM ASSISTANCE

In FY2006/2007, the CPR program had the opportunity to offer assistance to patients in three new disease states, bringing the total number of operating disease categories to patients to 14. The currently funded disease states include:

- Autoimmune Disorders
- Breast Cancer
- Colon Cancer
- Diabetes
- Kidney Cancer
- Lung Cancer
- Brain Tumors
- Pancreatic Cancer
- Head and Neck Cancer
- Lymphoma
- Macular Degeneration
- Prostate Cancer
- Sarcoma
- Secondary issues resulting from chemotherapy treatment

Additional OIG approved disease categories that are not yet funded include:

- Cervical Cancer
- Hepatitis A, B, C
- HIV/AIDS
- Kidney Disease (non cancer)
- Leukemia
- Mental Health
- Multiple Sclerosis
- Myeloma
- Ovarian Cancer
- Testicular Cancer
- Uterine Cancer

FY2006/2007 PROGRAM ENHANCEMENTS AND STATISTICS

> A secured, web-based application portal, designed specifically for providers, was introduced to allow providers to enroll patients via the Internet, minimizing enrollment time as well as offering real-time information on the availability of assistance in each disease state.

> Department of Health and Human Services Office of the Inspector General (OIG) notified PAF that every dollar paid on behalf of a Medicare patient would count towards their True Out-Of-Pocket expense (TrOOP).

> Patient Award maximums were reviewed and adjusted as necessary to account for new treatment options that were introduced in the market since the last yearly review.

> PAF’s monthly approvals resulted in equal dollars being distributed.
> Total number of patients served by the program during FY 2006/2007 was 6,074.

*(Since inception of the CPR Program on April 1, 2004, co-payment assistance has been provided to 12,004 patients.)*

**FY2006/2007 PROGRAM MEDIA SUMMARY**

Media outreach supporting the Co-Pay Relief program in FY 2006/2007 included placing paid advertisements as well as earned media in the following publications:

- Senior Advocate (Hampton Roads, Virginia)
- ASCO Daily News
- Clinical Journal of Oncology Nursing
- Oncology Issues

**FY2006/2007 CPR OPERATIONS**

Donations to the CPR program are allocated equally over a twelve-month period to ensure that funds will be available throughout the year to award to patients. Each approved patient is allocated funds per twelve month period for reimbursement of approved co-pay assistance expenditures billed to CPR by treating physician offices or pharmaceutical agent suppliers to include retail pharmacies, mail order pharmacies and specialty pharmacies. The amount allocated to patients varies by disease category. Reimbursement is made directly to the providers and pharmacies through debit card payments or three time daily check disbursements.

The CPR program functions at maximum utilization every month. Due diligence is ensured through daily monitoring of individual patient accounts, disease silo accounts and daily expenditures. This daily monitoring is facilitated by a financial team and an accounting software program developed for PAF with oversight by PAF Vice President of Finance, Chief Operating Officer and the Chief Executive Officer.

**FY2006/2007 CPR DONORS**

PAF acknowledges with sincerest gratitude the outstanding financial contributions made to the Co-Pay Relief program by the donors. The vision and unselfish support provided by these donors brought financial, emotional, and psychological relief and, in many instances, extended and/or saved lives, as their donations allowed PAF CPR program to offer assistance to those in need.

On behalf of the patients we serve, our greatest appreciation is extended to the following donors:

- Amgen
- AstraZeneca
- Bristol-Myers Squibb
- OSI Eyetech
- Genentech
- GlaxoSmithKline
- Pfizer
- Pfizer Oncology
- Purdue Pharma
- sanofi-aventis
- Schering-Plough
- Susan G. Komen for the Cure

> I got more service than I have gotten from any other source. [My case manager] followed up on our phone calls and sent me such good information. I am so grateful. Your help is a life-line for us who have incurable disease.”

— Ruth Lovik
Tucson, AZ
Direct Patient Services Division

Virginia Cares Uninsured Program

PAF RECEIVED FUNDING FROM THE COMMONWEALTH OF VIRGINIA in the fourth quarter of FY2006/2007 to operate the Virginia Cares Uninsured Program (VCUP). The program will be initiated with a soft launch in July 2007 and will assist uninsured Virginians who have been diagnosed with chronic, debilitating, or life-threatening diseases and who are experiencing access to health care issues. The following sustained services are provided by the professional case management staff of PAF at no charge to the patient:

> Assist patients with applying, expediting decisions, and appealing Social Security Disability Insurance, Supplemental Security Income, Long Term Disability and/or Short Term Disability

> Negotiate funding and/or insurance coverage to access medical devices, surgical procedures, medications, medical discounts or write-offs for services, and clinical trials

> Negotiate access to free or reduced medication, nutrition, housing, utilities, and free or reduced transportation and lodging for patients who must travel for treatment

> Negotiate insurance with COBRA, Medicaid, Medicare, Risk Pool Coverage, Guarantee Issue Plans, HIPAA plans and FAMIS/FAMIS Select

Patient eligibility for the Virginia Cares Uninsured Program:

> Must be a United States Citizen
> Must be a Resident of Virginia
> Must be uninsured
> Must have a diagnosis of a chronic, life-threatening, debilitating disease

This program will include outreach to a wide variety of social service and non-profit organizations, churches, clinics and health centers to educate Virginians on Patient Advocate Foundation’s Virginia Cares Uninsured Program.
PAF CELEBRATED ITS THIRD YEAR OF PARTNERSHIP with the Lance Armstrong Foundation (LAF) and the LAF LIVESTRONG SurvivorCare (LSSC) program in FY2006/2007. For cancer patients calling the LAF LSSC toll free number, who are in need of PAF services including access to health-care and social service programs, they are immediately referred to PAF case managers who work exclusively with LAF LSSC referrals.

National marketing of the LSSC program has continued to be a high priority. The LSSC website was revised highlighting services available to cancer survivors and listing PAF as a LSSC partner. A new tri-fold promotional piece and script pad, also listing PAF as a partner, was introduced and distributed at national meetings, such as Oncology Nurses Society’s annual meeting and the American Society of Clinical Oncology meeting. This piece is also distributed to physician offices for patients as a resource. Another LSSC specific brochure was published highlighting the services offered and partner contact information.

Through this increased marketing, PAF experienced a 56% increase in LSSC referrals over FY2005/2006, assisting more than 2,250 patients from July 1, 2006 to June 30, 2007. Patients assisted by the LSSC program state:

“The case manager did an excellent job advocating for me, she was kind understanding, knowledgeable. I was impressed with the dedication she provided for my case. Thank you.”

- Kristen Frankenfield, Michigan

“It's a very good source of information in a very stressful time. It's nice to know that support is available.”

- David Sistek, Virginia

“I was able to ask many insurance related questions that otherwise were very difficult to answer. Thank you so much.”

- Emily Ose, Florida

Additionally, PAF staff continues to serve as peer reviewers on patient materials produced by the Lance Armstrong Foundation, which has expressed appreciation for the work PAF is doing in cancer survivorship.

A-B-C INITIATIVE
Access-Benefits-Claims

The A-B-C Initiative: Access-Benefits-Claims entered its second year of operation in FY2006/2007 and signed partnership agreements with two major research hospitals, Duke University Health Systems in Durham, North Carolina and City of Hope in Los Angeles, California. PAF case managers in the A-B-C Initiative provide expertise and effectiveness in:

- Employment Issues
- Disability Issues
- Supplemental Financial Assistance Programs
- Therapeutic and Diagnostic Pre-Authorization Resolutions
- Denied Claims Appeal Dispute Resolutions
- Billing and Coding Dispute Resolutions
- Coordination of Benefits Dispute Resolutions
- Out of Network Dispute Resolutions

Additional hospital partners will be joining the Initiative in FY 2007/2008 as several exploratory and continuing negotiations meetings have been set for the first and second quarters of 2007. PAF continues to provide A-B-C services to three physician practices, the Cancer Centers of Florida, Cancer Centers of the Carolinas and Rocky Mountain Cancer Center.
Centers for Disease Control Grant Update

PATIENT ADVOCATE FOUNDATION FEATURED AS FIRST CENTERS FOR DISEASE CONTROL PARTNER in the premier edition of Insight-News from CDC’s Division of Cancer Prevention and Control

PAF was the first partner selected and profiled in the CDC’s Division of Cancer Prevention and Control premier edition in-house newsletter to feature our survivorship activities exclusively. In the Partner Profile section, a listing of the direct patient services provided to patients with access to care issues was given. A brief synopsis of each of the two CDC Cooperative Agreements that PAF has with the CDC was provided as was a snapshot of PAF’s Co-Pay Relief program and the Colorectal CareLine.

CDC/PAF CANCER PREVENTION AND SURVIVORSHIP PARTNERSHIP (SCUP)

PAF is completing year four of this grant program which is part of the CDC’s initiative to increase Early Detection or Survivorship of Cancer in Under-Served Populations. This program has served 8,388 patients since inception in September 2003. Case managers assigned to this program are providing services to 428 patients monthly on average. In 2003, the number served was 100 patients monthly.

PAF was invited to its first ever reverse site visit to tour CDC headquarters in Atlanta, Georgia in March 2007 and met personally with Dr. Eddie Reed, Director - Division of Cancer Prevention and Control, National Center for Chronic Disease Prevention and Health Promotion. PAF was given the opportunity to provide an in-depth presentation on PAF services to the CDC’s entire Cancer Division, the Division of Heart Disease and Stroke Prevention Management, and the Division of Diabetes Translation Management to explore partnership opportunities.

> PAF’s abstract regarding SCUP was selected for a poster presentation for the CDC’s upcoming Cancer Conference to be held in August 2007.
> PAF was selected to participate in a National Cancer Control Coalition Program Director’s conference call to discuss PAF services to patients.
> Currently reported mortality rate is 2.4% of the patients served, down from 3.9%.
> Maintaining an average survey return rate of 78% on the patients served through SCUP.
A quote from the latest interim report from a SCUP patient to PAF:

A 60-year-old female with ovarian cancer living in Coronado, California stated:

Where do I begin? As stated each time you assisted me to understand the daunting process I faced, you were a candle with a beautiful flame of hope in the darkness. I appreciate all your efforts, patience and cooperation to the bottom of my heart.

PAF was able to facilitate her approval for San Diego County Assistance and expedite her application for Social Security Disability so she would not have to worry needlessly about her finances and be able to concentrate on her recovery and overall wellness.

**CDC/PAF HEMATOLOGIC CANCER EDUCATION AND OUTREACH PARTNERSHIP**

FY2006/2007 marked the final year of PAF’s three year CDC/PAF Hematologic Cancer Education and Outreach Partnership. As with SCUP, PAF has continued to exceed all goals set forth in this project. In its Annual Report submitted to the CDC in November 2006, PAF reported that it had exceeded its goal of providing educational counseling services to a minimum of 125 hematologic cancer patients, family members, friends and caregivers per quarter by 143.2% (712 patients). For FY2006/2007, PAF provided services to 1,355 individuals with an average of 339 individuals being served quarterly.

Outreach is an important component of this project. There were 34 local and regional outreach events conducted in 8 states, including Pennsylvania, Connecticut, New York, Virginia, Nebraska, Iowa, Maryland and Florida. In addition, staff attended six national outreach events and conferences such as the Lymphoma and Myeloma Conference, the Association of Pediatric Hematology/Oncology Nurses, and the National Comprehensive Cancer Society Annual Meeting.

PAF case managers participated in a national teleconference with the National Children’s Cancer Society, *Health Insurance Issues for Families Coping with Pediatric Cancer*. PAF also participated in a regional program for patients post-transplant titled Living Now hosted by the National Marrow Donor Program.

“I will always be very grateful for what PAF did for me. They were very thorough and helpful. Thank you so much.”
— Fred DeCocq
Sand Springs, OK
Senior Services
Director: Margie Griffin, Virginia

The Senior Services division of PAF entered its third year of operations during this fiscal year. The case managers assigned to this division continue to enroll eligible seniors into Medicare Part D. Nationally 90% of eligible seniors have enrolled.

In addition, PAF Senior Services staff, from July 1, 2006 to June 30, 2007, participated in 23 events, providing education and information to over 4,000 individuals. Staff attended the first Aged and Abilities Expo at the Hampton Roads, Virginia Conference Center in May 2007, and met with local residents, social service agencies and local healthcare providers. Case managers also attended Hats Off to Caregivers, a local event hosted by the Peninsula Task Force on Aging that saluted the caregivers for the elderly. PAF is an active member of the Task Force on Aging. National Conferences included Geriatrics 2007 and multiple meetings with Centers for Medicare and Medicaid officials in Washington, DC.

National Hispanic/Latino Outreach Program
Director: Wanda Febus, New York

The National Hispanic/Latino Outreach Program (NHLOP) seeks to improve access to health care for patients diagnosed with chronic, debilitating or life threatening illness within the Spanish speaking communities by increasing awareness of PAF services. Its goal is to decrease healthcare disparities by creating partnerships with local organizations, major medical facilities, and influential community leaders that provide services to the Hispanic/Latino population within these communities. PAF has bilingual case managers in New York, Florida, California, and Virginia.

The case managers assigned to NHLOP participated in 404 outreach events, reaching over 14,500 individuals. This includes outreach to community health centers, medical centers, free clinics, private medical offices, churches, and community based organizations. Staff also attended, exhibited, or presented at national conferences including the National Council of La Raza, the American Association of Diabetic Educators, the Fifth Annual Latino Health Conference, and the National Hispanic Nurses Conference.

NHLOP FORECAST FOR FY2007/2008
> Launch a new Spanish PAF website in November 2007
> Author a new Spanish publication
The National African American Outreach Program (NAAOP) attended 50 local, regional and national outreach events, educating over 13,000 individuals about PAF services. NAAOP staff attended the Virginia Black Expo and national conferences included the National Association of Black Social Workers, the National Black Nurses Association, American Lupus Foundation Leadership Meeting, the CDC’s 2006 National Health Promotion Conference, and the African American Prostate Care Disparities Summit.

The NAAOP has a total of 23 members with representation from case management, finance, Co-Pay Relief and Colorectal CareLine. Members updated the Promoting a Healthier African American Community publication, adding information on sickle cell disease. The Church Fan project was also replicated for a Virginia specific mailing to Richmond, Virginia area churches. The Fan provides a listing of Virginia resources available to the African American community. PAF also collaborated with the South East Community Health Taskforce in Newport News, Virginia and other local organizations to empower and educate local residents in the community on ways to reduce chronic disease.

**NAAOP FORECAST FOR FY2007/2008**

> Participate in a 10 city tour with the Sickle Cell Association educating attendees about PAF services

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**PAF Outreach**

In addition to the outreach events attended by members of the Senior Services team, the National Hispanic/Latino Outreach Program and the National African American Outreach Program, PAF staff members exhibited, attended and/or presented at an additional 83 events, reaching an additional 68,444 individuals. Those events included:

> The American Academy of Ophthalmology Annual Meeting
> The American College Health Association
> The American Society of Clinical Oncology (ASCO) Annual Meeting
> Association of Oncology Social Workers Conference
> Association of Pediatric Oncology Nurses
> The Center for Business Intelligence
> The Oncology Nursing Society (ONS) Annual Meeting
> The Association of Community Cancer Centers (ACCC)
> The National Comprehensive Cancer Network (NCCN) Annual Conference

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**American Academy of Ophthalmology**

**American College Health Association**

**American Society of Clinical Oncology (ASCO)**

**Association of Oncology Social Workers Conference**

**Association of Pediatric Oncology Nurses**

**The Center for Business Intelligence**

**The Oncology Nursing Society (ONS) Annual Meeting**

**The Association of Community Cancer Centers (ACCC)**

**The National Comprehensive Cancer Network (NCCN) Annual Conference**
PAF in the News

Patient Advocate Foundation continues to be featured in many tier one media outlets. In FY2006/2007, feature articles appeared in:

- Newsweek
- Reader’s Digest
- Women and Cancer
- Coping with Cancer
- Oncology Issues
- The Virginia Federation of Republican Women newsletter
- Managed Healthcare Executive
- The Daily Press
- Insight-News & Views from CDC’s Division of Cancer Prevention and Control
- National Public Radio-Kansas City, Missouri

Additionally, PAF was interviewed for future articles by:

- Real Simple
- Caring Today
- The Wall Street Journal
- Good Clinical Practice Journal
- Military Today

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“Thank you so much for your valuable input on this case. I gave my sister the information you sent. She’s very overwhelmed right now. I’ve offered to help, but, just like her oldest sister she has ‘Super Woman Syndrome!’ I don’t know why we find it difficult to allow others to help us. I want you to know that your efforts really touched my heart in ways you cannot imagine. I was feeling very helpless.”

— June Beck, RN, CCM
Nurse Case Manager, Billings, MT
The PAF Publications Committee had a very productive 2006/2007. A new publication, patterned after the *Promoting a Healthier African American Community* was created specifically for the American Indian/Alaska Native (AI/AN) population. Titled, *American Indian Alaska Native Outreach Program: Promoting a Healthier American Indian and Alaska Native Community,* this publication provides disease specific information prevalent to the AI/AN population. It also provides a listing of resources for the population as well. Additionally, the aforementioned *Promoting a Healthier African American Community* was updated, adding a chapter on Sickle Cell Anemia.

In January 2007, PAF introduced a new full-length publication: *Guide to Health Savings Accounts, What You Need to Know About High Deductible Health Plans and Health Savings Accounts,* written by Roy Ramthun, a nationally recognized expert in health policy with a special expertise on Health Savings Accounts. Mr. Ramthun was a health policy advisor to President George W. Bush and currently has his own healthcare consulting practice. PAF was a collaborator and publisher of this resource.

PAF’s newest full-length publication was released in May 2007 and titled *Too Young to be Ill…A Practical Survival Guide for Caregivers of Children and Young Adults.* This publication provides practical tools to help caregivers anticipate steps necessary to improve the healthcare journey. It addresses topics such as what does a diagnosis mean, what mental preparations will a patient need, insurance options, respite care and financial obligations, as well as appropriate resources.

All of the PAF publications are available for download at www.patientadvocate.org.

*Guide to Health Savings Accounts*

by Roy Ramthun

*In collaboration with Patient Advocate Foundation*
THE 8TH ANNUAL PATIENT CONGRESS was hosted June 24-26, 2007 at the Washington Court Hotel in Washington, DC. This year’s Patient Congress celebrated the voice of the patient and the lasting impact patients have on the lawmakers striving to improve the healthcare delivery system in the United States.

Attendees of the 8th Annual Patient Congress numbered over 200, represented 49 states and the District of Columbia, completed 189 visits to Capitol Hill offices including 60 meetings with the Member from the House or Senate office. Our attendees visited 96 of 100 Senatorial Offices and 100 House of Representatives Offices representing the voices of patients everywhere. The five key points that attendees brought to Capitol Hill asking their elected officials to support are:

- Eliminate Barriers to Health Insurance Coverage
- Restore Medicare Reimbursement Cuts for Imaging Services
- Reauthorize and Strengthen the S-Chip Program
- Provide Increased Fiscal Year 2008 Appropriations
- Preserve Access to Erythropoiesis Stimulating Agents for Cancer Patients

Attendees also participated in a private healthcare briefing at the White House that addressed the current Administration’s health care priorities by White House personnel, including a presentation given by Julie Goon, Special Assistant to the President for Economic Policy and Herb Kuhn, Acting Deputy Director, Centers for Medicare and Medicaid Services. Additional keynote Congressional Members were The Honorable Debbie Stabenow (D-MI), United States Senate; The Honorable Robert C. Scott (D-3rd, VA) United States House of Representatives; The Honorable Sue Myrick (R-9th, NC), cancer survivor and member of the United States House of Representatives; The Honorable Allyson Schwartz (D-13th, PA), United States House of Representatives; and The Honorable Capri Cafaro (D-32nd), Ohio State Senate. Mike McCurry, Partner - Public Strategies Washington and former White House and State Department Spokesperson shared communication strategies with our attendees, imparting tools they could use as they made visits to their Congressional Member’s offices. As well, Lillie Shockney, RN, BS, MAS, Administrative Director of Johns Hopkins Breast Center, featured author of Stealing Second Base, shared the humorous, yet inspirational story of her own
diagnosis and subsequent treatment for Breast Cancer. Attendees also had the unique opportunity to meet with legislative representatives at the breakfast reception hosted in the Senate Russell Building and the lunch reception hosted in the Cannon Caucus Room on June 26, 2007.

Our attendees’ voices in Washington, DC made lasting impressions and new friendships were born. The members of Congress with whom our attendees met were able to have a face to pair with the federal initiatives that are before them, elevating the importance of their work and emphasizing the gravity of the office they hold.

Each of the eight years that PAF has hosted the annual Patient Congress it has been our goal to offer a conference that is both inspiring and educational. We feel that the 8th Annual Patient Congress surpassed the expectations of our attendees who, in their own words expressed:

“The 8th Annual Patient Congress was exhilarating, invigorating, motivational, inspirational, all good!”

“I was selfishly proud to be involved with Patient Advocate Foundation.”

“Patient Congress was an excellent and inspiring way to connect with others who want to make a difference.”

“[Patient Congress] was an opportunity to represent millions who can only benefit when their voices are heard by Congress through us.”

“I enjoyed meeting new people and networking in a common cause as well as feeling I have a voice in Congress.”
“[Patient Congress] was a wonderful, exciting and fulfilling experience, especially for a nurse who is advocating for patients.”

“I learned that by educating ourselves, we can educate our Congressmen.”

“I feel exceptionally privileged to have been able to experience the political process first hand; it has made my commitment to advocacy even stronger!”

8th Annual Patient Congress Exhibitors Included:
The Wellness Community
Lupus Foundation of America
American Society for Therapeutic Radiology & Oncology
Ovarian Cancer National Alliance
Sarah Lawrence College - Health Advocacy Program
Lung Cancer Alliance
The Leukemia & Lymphoma Society
Children’s Cause for Cancer Advocacy
Y-ME National Breast Cancer Organization
Catholic Charities Healthcare Network
Geriatric Oncology Consortium
Men’s Health Network
Centers for Medicare & Medicaid Services
Amputee Coalition of America
National Cancer Institute - Cancer Information Services
Young Survival Coalition
Fairness Foundation
Brain Tumor Awareness Organization
Patient Advocate Foundation
Colorectal CareLine
Co-Pay Relief, A Patient Assistance Program
Coping Magazine
Abigail Alliance for Better Access to Developmental Drugs
National Alliance of State Prostate Cancer Coalitions
Alliance for Prostate Cancer Prevention
Pancreatic Cancer Action Network
National Cancer Institute, Office of Communications and Education
Lance Armstrong Foundation
Pulmonary Hypertension Association
American Institute for Cancer Research - Education Dept
Intercultural Cancer Council

Rep. Rick Larsen (D-2nd-WA) and constituents
Rep. Barbara Cubin (R-At Large-WY) and constituents
Sen. Mike Crapo (R-ID) and constituents
Sen. Charles E. Grassley (R-IA) and constituent
Sen. Byron L. Dorgan (D-ND) and constituent
Rep. Allyson Schwartz (D-13th-PA) addresses the attendees at the Stephen Decatur House
Sen. Debbie Stabenow (D-MI) addresses the attendees at the Stephen Decatur House
Rep. Sue Myrick (R-9th-NC) with fellow North Carolinians Woody Connette, PAF Board President and Nancy Davenport-Ennis, CEO

Lillie Shockney, our featured author and keynote speaker at Monday’s dinner.
Scholarship for Survivors

Academic Award Program

Each year at Patient Congress, PAF presents the Scholarship for Survivors Academic Award Program. The purpose of the program is to provide financial support to patients seeking to initiate or complete a course of study that has been interrupted or delayed by a diagnosis of cancer or other critical or life-threatening disease.

The Scholarship for Survivor awards are named in honor of several longstanding Partners In Progress, who have provided financial support for PAF since 2000. Each year, PAF provides $50,000.00 in scholarship funds. This year, two new scholarships were named in memory of two individuals who were strong advocates for PAF and the rights of patients to have access to healthcare. Both of these individuals, Robin Prachel and Karen Reeder lost their battles with their disease and we honor their memory with these two scholarships.

This year, two past recipients graduated and addressed the Patient Congress audience, sharing with them the effect PAF had had on their lives. Recipient Monica Bowser graduated from the University of North Carolina at Charlotte and has been accepted into Graduate School. Monica hopes to “land a job at a Fortune 500 corporation, and be able to support the Patient Advocate Foundation, and give someone else the hope and joy that the organization has given me.” The other recipient was John Schafer who graduated from the University of Dayton. John said, “without the support of my family, friends, and the PAF, I would have never developed into the person I am today. I hope to stay healthy and continue to live life to the fullest as I start my career in New York City with Ernst & Young this coming September.” Congratulations to both Monica and John!

The 2007 Scholarship for Survivors recipients were:

The Robin Prachel Award
Dylan Feierabend
Ferndale, California
Attending: College of the Redwoods

The Karen L. Reeder Award
Nicholas Harper
Louisville, Kentucky
Attending: Bellarmine University

The Monica Bailes Award
Benton Brown
Cedar Hill, Texas
Attending: University of Texas Southwestern Medical School

Scholarship for Survivors
Andrew Boggess
Temperance, Michigan
Attending: Adrian College

Zazel-Chavah O’Garra
St. Albans, New York
Attending: Fordham University

A Special Thanks goes to our ardent supporters of Patient Congress:

AmerisourceBergen
Amgen Oncology
Bayer Healthcare
Bristol-Myers Squibb
Eli Lilly
Genitope
GlaxoSmithKline
Lance Armstrong Foundation
Novartis
Roche
Schering Plough
US Oncology

Graduating Senior and past scholarship recipient Monica Bowser

ANNUAL REPORT FY 2006/2007 33
Scholarship for Survivors Awards named in honor of PAF’s Partners In Progress for their sustained financial support:

**The Cheryl Grimmel Award in Honor of AMGEN, Inc.**  
**J. Eric Holland**  
Edmonds, Oklahoma  
Attending: University of Central Oklahoma

**Scholarship for Survivors in honor of sanofi-aventis Pharmaceuticals**  
**Drew Fisher**  
Pagosa Springs, Colorado  
Attending: University of New Mexico

“I cannot believe how fast this last year has gone by. It seems not so long ago that I was boarding a plane for my 3rd Patient Congress and now it is already my fourth. I would like to thank the Patient Advocate Foundation for all of their help and support.”

**Scholarship for Survivors in honor of GlaxoSmithKline**  
**Kendra Smith**  
Orchard Park, New York  
Attending: Brockport University

“It has been a great experience coming to the PAF conference the past two years and I would like to thank everyone involved. PAF has so many qualities that are successfully being spread to other individuals, and everyone helps in someway. Thank you so much for opening opportunities for me, they will all be very helpful in the future.”

**Scholarship for Survivors in honor of Pfizer, Inc.**  
**Suzanne Day**  
Whitney Point, New York  
Attending: Roberts Wesleyan College

“…this scholarship was an incredible help to me financially. The scholarship is helping to allow me to continue my education at Roberts. I am very thankful for this award and all the opportunities it has allowed me to have.”

I don’t know if I ever thanked you properly, but thank you. All the information you provided me was very helpful. I received financial assistance from the hospital for my surgery, from the cancer center for my treatment and from Patient Assistance Program for my seizure medication. And 2 weeks ago I was approved for Social Security benefits. While this does not solve all my problems, it goes a long way. I appreciate everything you did for me. Knowing there people like you that care about people in situations like mine is comforting. If I can ever do anything for you, please let me know.”

— Laurie Fortner, Inman, SC
PAF HELD ITS SIXTH ANNUAL A PROMISE OF HOPE AFFAIR at the new Newport News Marriott at City Center on February 24, 2007. Our Mistress of Ceremonies and Honorary Chairperson for the evening was Barbara Ciara, anchorwoman for the local CBS affiliate, WTKR-TV3. Three-hundred and sixty attendees filled the ballroom and had the opportunity to bid on more than 385 live and silent auction items, a 37% increase in auction items from last year. The auction categories included Art, Dining Around, Fashion & Jewelry, Home & Garden, and Pampering Yourself. The local band Slapwater provided live entertainment. Arpeggiare Harp Ensemble, a group of elementary and middle school harpists from Williamsburg, Virginia entertained guests during the VIP Reception and Becca Fifelski and Lindsay Arndt provided acoustic entertainment during the Welcome Reception.

We were joined by Congressman Robert Scott (D-VA) and Mayor Joe Frank, City of Newport News and received letters welcoming our guests from:

Governor Tim Kaine, Commonwealth of Virginia
Mayor Joe Frank, City of Newport News
Senator John Warner (R-VA)
Congressman Robert Scott (D-3rd-VA)
Congressman Bob Goodlatte (R-6th-VA)
Congresswoman Thelma Drake (R-2nd-VA)
Congressman Eric Cantor (R-7th-VA)
Through the support of local businesses, PAF’s Board of Directors and PAF Partners-in-Progress, *A Promise of Hope Affair* was able to raise more than $236,322 inclusive of sponsorships, donations, auction bids, and in-kind donations. These funds enable PAF to continue the day-to-day work of helping patients nationwide resolve their insurance, job retention and/or debt crisis matters relative to their diagnosis of a chronic, life-threatening or debilitating disease.

**HONORARY CHAIRPERSONS**

Barbara Ciara, Managing Editor and Evening News Anchor, WTKR-TV3, CBS

Dr. Mary T. Christian, Virginia House of Delegates (Ret.)

The Honorable Joe Frank, Mayor, City of Newport News

The Honorable Phil Hamilton, Virginia House of Delegates

**ANCHOR COMMITTEE**

Bruce Breeger

Rene Cabral-Daniels, JD, MPH

Kenneth B. Hodge, CLU

Mary Katherine Hogg

M. Caroline Martin, RN, MHA

Brian Skinner

Somer Wilson

Coastal Forms & Data Products, Inc.

Virginia Department of Health

Benefit Plan Services

Wachovia Securities

NurseWorks

Wachovia

US LEC of Virginia

**AUCTION COMMITTEE**

Nancy Culbertson

Mary Ellen Fleeger

Mary Giguere

Ruth Anne Reed

Karen Seitz

Victoria Doheny

**PATIENT ADVOCATE FOUNDATION GALA TEAM**

Nancy Davenport-Ennis, Roy Ramthun, Susan Ramthun, Jack Ennis

John H. Ennis, Jr.

Alan Richardson

Molly Tanner

Tracy Andrus

Vicki Storey

CEO, President

Chief Development Officer

Executive Vice President of Resource Development

Vice President of Marketing and Development

Supervisor, Communications Department

Consultant, Connections Corp.

**A PROMISE OF HOPE AFFAIR SPONSORS**

<table>
<thead>
<tr>
<th>Gala Dinner</th>
<th>VIP Reception</th>
<th>Silent Auction Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amgen Oncology</td>
<td>Eli Lilly and Company</td>
<td>Novartis</td>
</tr>
</tbody>
</table>

**TABLE SPONSORS**

<table>
<thead>
<tr>
<th>Gold Sponsor</th>
<th>Silver Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bristol-Myers Squibb</td>
<td>Bayer Healthcare</td>
</tr>
</tbody>
</table>

Coastal Forms and Data Products

Riverside Health System

Virginia Oncology Associates
Congressman Robert C. “Bobby” Scott (D-VA) addresses the guests

Bronze Sponsor
Arent Fox, LLP
Leah Arnett
Benefit Plan Services
City of Newport News
Corporate Express
Dennis Kiser and Donna Crinklaw-
Old Dominion Homes
Hamner Development Company
Headway Corporate Resources
James C. Smith, Jr., Attorney &
Counselor at Law
John Ennis and Nancy
Davenport-Ennis
Malvin, Riggins and Company
Mary Katherine Hogg,
Wachovia Securities
Martha Reed and John L. Murphy
Northrop Grumman Newport News
NurseWorks
Old Point National Bank

Peninsula Funeral Home
Purdue Pharma
RE/MAX Peninsula
Sentara Healthcare
Spain Commercial
U.S. LEC
Vicom
Wachovia Bank
Wags to Whiskers Kennel and
Grooming

Event Supporters
Farm Fresh Charitable Foundation
Ferguson Enterprises
J. Winston and Leslie Read
Hall Automotive
Hugh and Gina Barlow

Patient Advocate Foundation’s
National African American
Outreach Program
RK Toyota-Volvo

Guests dancing to the music of Slapwater

Jack Ennis, PAF Chief Development Officer

Paul Seltman and Jeanne Ireland

Beth Darnley-PAF CPO, guest, and Rene
Cabral-Daniels, member of the PAF Executive
Board

Jane Susan Frank, Mayor Joe Frank, and
Nancy Davenport-Ennis

Delegate Phil Hamilton informs attendees on
PAF being included in the Virginia budget

Alan Richardson, POH Chair and Nancy
Davenport-Ennis
SUSTAINING PARTNERS
Amgen, Inc.
AstraZeneca
Bayer Healthcare
Bristol-Myers Squibb
Cancer Centers of Florida
Cancer Centers of the Carolinas
City of Newport News, VA
Commonwealth of Virginia
Duke University Health Systems
Eli Lilly and Company
(osi) eyetech
Genentech
Genitope
GlaxoSmithKline
Lance Armstrong Foundation
Novartis
Pfizer
Purdue Pharma, LP
Rocky Mountain Cancer Centers
sanofi-aventis
Schering-Plough
Susan G. Komen for the Cure
US Oncology
Virginia Department of Health Office of Minority Health and Public Health Policy
Virginia Oncology Associates

GENERAL DONATIONS
Alan Richardson
Alice Silverblatt
Amie Squibb
Amy Feigenbaum
Angela De Carlo
Angela Thompson
Ann Ketchum
Ann Louise Thompson
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Ben Gillig
Bernice Bunkley
Beth Darnley
Bette Vezza
Beverly Ingham
Billy Baldwin
Brandon Price
Camille Cutler
Carolyn Andrews
Catherine Hurdle
Cecilia Melia
Charlotte McMullin
Cherie Johnson
Cheryl Nowell
Chris & Susan Schools
Clyde Kopp
Connie Slayton
Cully Ward
Dale Tarver
Dan Columbus
Dana Davis
Daniel Gonzalez
Danna Mobley
David and Susan Olson
David Fisher
David Raffo
Deborah Andrus
Deborah Russell
Deirdre Cappe
Diane Gluck
Diane Murray
Donald Kandel
Donna Cashin
Doral Dunn
Dornetta Newland
Dr. Bishop Read
Dynelle Lunsford
Earlean Murphy
Edna Tillman
Edwin Anderson
Elaine Martinez
Elena Ganenko
Elizabeth Fox
Elizabeth Sewell-Berger
Elvira Hanson
Erin Moaratty
Ernest & Sally Escarcega
Eva McDowell
F. Ligammari
F. Scharff
Fay Smith
Forrest Warren, Jr.
Fran Castellow
Francis McGowan
Fred Murray
G.T. Solakiewicz
George Armitage
George Jacobs
George McNamara
Gerald Bloom
Glenn Berkin
Guadalupe Lorenzo
Gwendolyn Oten
Helen Koch
Howard Sagar
Irene Peltzer
Jackie Beard
Jacqueline Claxton
Jamie Caruccio
Jane Garfield
Janet Clement
Jeanne McClellan
Jerelyn Rhodes
Jim Latham
Joan Burdon
Joe S. Frank
John Brandt
John Dennison
John H. Ennis, Jr.
John L. & Martha Reed Murphy
John Stember
Joseph and Grace Laratta
Judith Clarke
Karen Howland
Katherine Byrd
Katherine Mosteller
Kathryn Manuelian
Kathy Stutz
Ken Lambert
LaKendra Green
Laurel Gregory
Leigh Loyd
Leonard Rosen
Linda Shird
DONATIONS IN HONOR OF
In Honor of Jim Meade
Luke Barlowe
Nancy Perrine
Donald Kandel
In Honor of Shauna Hatfield
Terri Williams
In Honor of Herbert Carrier, Sr.
Herbert Carrier
In Honor of Dianne Lamb
Ann Phillips Caffey
In Honor of Lucille Locke
Edwin Dolph

MEMORIAL CONTRIBUTIONS
In Memory of Alva Schwarzenbach
Janell Leopold
Max Hosier
Sandra L. Heller
Carol Meyer
Frances L. Beal
Richard C. Rekers
June L. Green
Marie Denkinger
In Memory of Carolyn Van Mensel
Elizabeth Saward
In Memory of Dr. Brad Timpf
Lillian Mayer
In Memory of Evelyn Hurt
William Hurt
In Memory of Grace Box
Carole Hamilton
Debbie Flores
Margaret Timmerman
Ronald Box
In Memory of Harriett Brunson
Robert J. Mayhorn
H. J. Williams
Emily Willis
Joseph L. Murphy, Jr.
In Memory of Herbert & Evelyn Adams
Alicia Adams
In Memory of Jim Pemberton
Steve and Susan Pemberton
Sharon Palmer
In Memory of Joan Golen
Amy Golen
In Memory of Joseph Kaiser
Mary Kaiser
John Bowen
In Memory of Joseph Kirschling
Deborah Schmidt
Marion O'Leske
Ellen Javernick
Deborah Homan

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ASCO 2007 - Test Participation
GlaxoSmithKline
Eli Lilly
RC Consulting/Advocate Partners
Hematology Oncology Managers of New York
VA Society of Rheumatologists, Inc. - McLean, VA
Lance Armstrong Foundation
Northern New England Clinical Oncology Society
Fox Chase Cancer Center

IN KIND
Alpha Phi Sorority
Barbara Ciara
Becca Fiefski
Bill McGivney, PhD
Brian Skinner
Bruce Avery
Bruce Breeger
Caroline Martin
Christian Downs
Coastal Forms
Connections Corporation
Dennie Gastineau, MD
Dianne Lamb
Don Conway, MD
Jamie Beult
John L. Murphy
Ken Hodge
Leah Arnett
Leo Sands
Lindsay Arndt
Marc Stewart
Mary Katherine Evans Hogg

Anita Kirschling
Joanna Forbes
In Memory of Karen Egger
Leslie Jones
In Memory of Manuel Matos
Elaine Piasecki
Ken Bianchi
Barbara Salome
Bonnie Lau
Susan Luckel
William Devane
Pashalia Pat Strekouras
In Memory of Viola Brown
Angel Russell
Rose Brown
In Memory of Betty MacMillan
Cheryl Sloan
National Legal Resource Network
  Attorneys (144 Attorneys)
  Pat Dougherty
  Rene Cabral-Daniels
  Richard Carter, Esq.
  Rob Rifkin, MD
  Roy Beveridge, MD
  Sheldon Weinhaus, Esq.
  Somer Wilson
  Woody Connette, Esq.

Bill & Janice Grace
Bill & Liz Bell
Bill & Nancy McGivney
Bill & Sarah Hamner
Bill Hamner, Jr. & Carmen Hamner
Bill Pinkham
Bill Reinagel/Cruise Holidays of Williamsburg
Bo Essentials
Boars Head Inn
Bodymovers
Bonefish Grill
Brenda Pool
Brian & Candi Skinner
Bristol-Myers Squibb
Bruce & Betsy Schmickley
Bruce & Shirley Avery
Bruce Edelen
Bryan & Fran Castellon
Bubbles Hair Salon, City Center
Cactus Steakhouse and Saloon
Cancer Center of North Dakota
Carl Phillips
Carrabba's Italian Grill
Cassandra Bare, Cookie Lee Jewelry Consultant
CDW, CORP
Charlotte Smith
Charney Chiropractic Back Rehab and Wellness
Cheers Restaurant
Chelsey Duncan
Cheryl Breeger-Braun
Christian & Laura Downs
Christopher Newport University-Dept. of Athletics
Chuck & Donna Adkins
City of Newport News
City of Newport News Museums
Coastal Forms and Data Products
Colonial Towing
Colonial Williamsburg Foundation
Commodore Theater
Connie Andrews
Connie Slayton
Constance Goodman
Corporate Express
County Grill
Courtney Jones
Curtis Hutchinson
Curves
Dancewear Designs
Daniel & Diana Cavazos
Danielle & Michael Remy
Darryl & Kimberly Whitehurst
David & Deborah Breen
David Powell
Dean Koontz
Deb Kennedy
Debbie Wulfe
Deb’s Picture This, Inc.
Dennis Kiser and Donna Crinklaw
Dixie RV Superstore
Donna & Max McMahan
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Dr. David Block, Your Family Chiropractor
Dynelle Lunsford
Ed & Pam Cleck
Ed Herndon, Florida State Policy Liaison
Eddie & Pam Tison
Edward Connette
El Mariachi
Elements
Elena Ganenko
Eli Lilly and Company
Erin Molaratty
Fab Foods at Medik's Market
Farm Fresh #404
Farm Fresh Charitable Foundation
Ferguson Enterprises
Food Lion #555
Ford’s Colony Country Club
Fred Hutchinson Cancer Center
Frederick & Jacqueline Watson
Freemason Abbey
  Restaurant and Tavern
Freemason Inn Bed & Breakfast
Garden Gazebo
Gary & Gail King
Gates Custom Milling, Inc.
Gee Lyreman
George & Michelle Hall
George & Sarah Bradby
GlaxoSmithKline
Glenn & Chelle Davis
Golden Horseshoe Golf Club
Golds Gym
Grafton Dodge
Grant & Donna Owens
Great Wraps at City Center
Greg Garrett Realty
Hair Gallery
HairTec2000
Hall Automotive
Hamner Development Company
Hampton Memorial Gardens
Hampton Roads Hot Tubs
Hampton Roads Orthopaedic & Sports Medicine
Harley Davidson of Yorktown
Harpoon Larrys
Hauser's Jewelers
Headway Corporate Resources
Helen Clark
Herb & Darlene Perry
Hi Ho Silver
Hilton Alexandria Mark Center
Hilton Village Goldsmith
Hooker Bait and Tackle
Hotel Phillips
Hugh and Gina Barlow
Ileana Martinez
Indianapolis Colts
Inga-Charlotte Doerp
Inn at Warner Hall
Iron Bound Gym
J. Romm
J. Winston and Leslie Read
Jack & Valerie Horner
Jack Willoughby
James C. Smith, Jr., Attorney & Counselor at Law
Jamestown Pie Company
Jamie and Lisa, Iowa State Policy Liaisons
Jane & Gary Gardner
Jane Owen and Robert & Wendy Santee, Tennessee State Policy Liaisons
Jasmine Vaughan of Jaszy's Jewelry
Jeff & Amy Bristow
Jeff Duncan
Jeff Duncan, Jr.
Jennifer Jaff
Jenny Windsor
Jillian's Waterside
Jim & Gerri Newsom
Joe & Jane Susan Frank
Joe & Mary Lieberman
John & Carol Hogg
John & Jane Powell
John Ennis and Nancy Davenport-Ennis
Jon & Shelly Joyner
Judith Clarke
June St. Clair
JW Marriott Hotel Pennsylvania Avenue
K. Sue Roper
Kacey Carneal
Karen & Chris Seitz
Karen Cordry
Keagun's Restaurant and Tavern
Kelly's Tavern
Ken Matthews Garden Center
Kevin Pankoke & Judy Jensen
Kiln Creek Golf Club and Resort
Kiskiack Golf Club
LaKendra Green
Lance Armstrong Foundation
Larry & Carolyn Andrews
Leah Arnett
Lee & Kim Prevette
Legends Hair Salon
Leigh Loyd
Linda House
Lisa Marie Samaha
Lisa Sargent
Lori & Larry Williams
Lori Overholt
Luchea Cooper Montana State Policy Liaison
Lynn & David Grimsley
Lynnhaven Fish House
Malvin, Riggins and Company
Manhattan's New York Deli & Pub
Marcia Bove
Mark & Katherine Donahoe
Marsha York
Martha Reed and John L. Murphy
Martha Smith
Mary & Wilber Christian
Mary Ann Macaluso
Mary Giguere
Mary Katherine Hogg, Wachovia Securities
Matt & Patti Williamson
Max & Dawn Miller
McKim Williams
Melissa Taylor
Melynda Obergfell
Miami Dolphins
Michael & Leslie Cook
Michael & Sally Firkins
Michelob ULTRA Open at Kingsmill
Molly Tanner
Movie Scene - Williamsburg
Nancy Culbertson
Nancy Nunn
Nansi S. Design
National Patient Advocate Foundation Staff
New Town Cinemas of Williamsburg
New York Knicks
Newport News Marriott at City Center
Nina Vann
Norris & Julie Adams
North Carolina State Policy Liaisons and Circle P Farm
Northrop Grumman Newport News
Novartis
NurseWorks
Obelisk Billiard Club
Oh! Photography
Okie Morris
Old Point National Bank
Omni Newport News Hotel
Oncology Reimbursement Solutions (US Oncology)
Oyster Point Counseling/Cheryl Kabana Ros, LCSW
Oyster Point Dermatology
P. Buckley Moss Society
PAF's National African American Outreach Program
Pam Hall
Pam Philbrick
Paramount's Kings Dominion
Pat & Jim Ragsdale
Pat Jolley
Pathways to Success
Patient Advocate Foundation's National African American Outreach Program
Patrick Henry Mall
Paul & Verna Goodman
Peninsula Fine Arts Center
Peninsula Funeral Home
Picture to Page, Inc.
Plastic Surgery Center of Hampton Roads
Poppy's Place
Powers Business Machines
Premier Designs
Pro Am Golf Company
Prospect Hill - The Virginia Plantation Inn
Purdue Pharma
Ray & Ruth Breeger
Raymond & Beth Tripp
Re/Max Peninsula
Red Star Tavern
Red, Hot and Blue Restaurant
Rene Cabral-Daniels & Taumi Daniels
Combined Federal Campaign and Combined Virginia Campaign

PAF participates in the Combined Federal Campaign (CFC) that was established by the United States government as a way for federal employees to support their charities of choice. PAF’s CFC number is 10681.

PAF also participates in the Combined Virginia Campaign (CVC), giving Commonwealth of Virginia employees the opportunity to support charities. PAF’s CVC number is 1540.
Audited Financial Statement

FY 2006/2007
### Direct Patient Services Division

**Patient Advocate Foundation**

**Statements of Financial Position**

June 30, 2007 | 2006
---|---

### Assets

<table>
<thead>
<tr>
<th>Current assets</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>General operating cash and cash equivalents</td>
<td>$3,772,793</td>
<td>$2,062,002</td>
</tr>
<tr>
<td>Restricted CPR cash and cash equivalents</td>
<td>18,431,332</td>
<td>11,996,924</td>
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<tr>
<td>Unconditional promises to give</td>
<td>52,000</td>
<td>13,000</td>
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<tr>
<td>Interest receivable</td>
<td>73,146</td>
<td>38,553</td>
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<tr>
<td>Employee receivable</td>
<td>409</td>
<td>498</td>
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<tr>
<td>Due from NPAF</td>
<td>97</td>
<td>110</td>
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<tr>
<td>Inventories</td>
<td>47,128</td>
<td>42,235</td>
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<tr>
<td>Prepaid expenses</td>
<td>41,874</td>
<td>39,841</td>
</tr>
<tr>
<td>Investments</td>
<td>1,740,435</td>
<td>1,729,082</td>
</tr>
</tbody>
</table>

**Total current assets**

24,159,214 | 15,922,245

<table>
<thead>
<tr>
<th>Property and equipment - net</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>472,642</td>
<td>267,313</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other assets</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refundable deposits</td>
<td>11,402</td>
<td>11,402</td>
</tr>
</tbody>
</table>

**Total assets**

$24,643,258 | $16,200,960

### Liabilities and Net Assets

<table>
<thead>
<tr>
<th>Current liabilities</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$301,821</td>
<td>$232,997</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>2,322,498</td>
<td>1,349,167</td>
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<tr>
<td>Accrued vacation leave</td>
<td>113,905</td>
<td>88,930</td>
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</tbody>
</table>

**Total liabilities**

2,738,224 | 1,671,094

<table>
<thead>
<tr>
<th>Net assets</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>1,593,140</td>
<td>712,913</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>18,431,332</td>
<td>11,996,924</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>1,880,562</td>
<td>1,820,029</td>
</tr>
</tbody>
</table>

**Total net assets**

21,905,034 | 14,529,866

**Net assets**

$24,643,258 | $16,200,960
Patient Advocate Foundation

Statements of Activities

<table>
<thead>
<tr>
<th>Years Ended June 30,</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unrestricted</td>
<td>Temporarily Restricted</td>
</tr>
<tr>
<td>Revenues, gains and other support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$6,439,873</td>
<td>$16,421,111</td>
</tr>
<tr>
<td>Private and public donations</td>
<td>29,559</td>
<td>-</td>
</tr>
<tr>
<td>Donated services and materials</td>
<td>147,739</td>
<td>-</td>
</tr>
<tr>
<td>Patient Congress</td>
<td>186,537</td>
<td>-</td>
</tr>
<tr>
<td>Promise of Hope</td>
<td>203,840</td>
<td>-</td>
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<tr>
<td>Special events</td>
<td>152,073</td>
<td>-</td>
</tr>
<tr>
<td>Investment income (loss)</td>
<td>953,827</td>
<td>-</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>9,986,703</td>
<td>(9,986,703)</td>
</tr>
<tr>
<td>Total revenues, gains and other support</td>
<td>18,100,151</td>
<td>6,434,408</td>
</tr>
<tr>
<td>Expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient services</td>
<td>3,533,363</td>
<td>-</td>
</tr>
<tr>
<td>Co-Pay Relief</td>
<td>12,235,123</td>
<td>-</td>
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<tr>
<td>Patient Congress</td>
<td>346,537</td>
<td>-</td>
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<tr>
<td>Scholarships</td>
<td>80,217</td>
<td>-</td>
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<tr>
<td>Supporting services:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>681,392</td>
<td>-</td>
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<tr>
<td>Fundraising</td>
<td>343,293</td>
<td>-</td>
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<tr>
<td>Total expenses</td>
<td>17,219,924</td>
<td>-</td>
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<tr>
<td>Change in net assets</td>
<td>880,227</td>
<td>6,434,408</td>
</tr>
<tr>
<td>Net assets - beginning of year</td>
<td>712,913</td>
<td>11,996,924</td>
</tr>
<tr>
<td>Net assets - end of year</td>
<td>$1,593,140</td>
<td>$18,431,332</td>
</tr>
</tbody>
</table>
PATIENT ADVOCATE FOUNDATION

PAF Staff Listing
2006/2007

EXECUTIVE

Nancy Davenport-Ennis
Chief Executive Officer

Jean H. Ennis
Chief Development Officer

Fran Castellow, MSEd.
Chief Operating Officer

Beth Darnley
Chief Program Officer

PATIENT SERVICES

Constance Goodman, RN
Patient Services Administrator

Shauna Hatfield, LiveStrong Senior Case Manager
Carolyn Andrews, LPN, Senior Case Manager & NAAOP Director
Wanda Febus, Director, Hispanic/Latino Outreach Program & Senior Case Manager
Brendan Bietry, California Hispanic/Latino Outreach Program Coordinator & Case Manager
Ileana Martinez, Florida Hispanic/Latino Outreach Program Coordinator & Case Manager
Shelby Cornick, Case Manager
Jane Garfield, Case Manager
LaKendra Green, Case Manager
Yvetta Hall, Case Manager
Dafne Holsapple, Case Manager
Patricia Jones, Case Manager
Lisa Kelley, Case Manager
Danna Mobley, Case Manager
Kimberly Owen, Case Manager
Nicole Robinson, Case Manager

Patricia Jolley, RN, Supervisor, Patient Services
Erin Moaratty, Quality Assurance Officer
Connie Slayton, BSN, CDC/PAF SCUP Director
Tami Lewis, RN, CCM, Senior Clinical Case Manager
Tanya Walker, RN, Senior Clinical Case Manager
Tammy Neice, RN, Clinical Case Manager
Marilyn Culbert, RN, Clinical Case Manager
Jacqueline Beard, Senior Case Manager
Margie Griffin, Senior Case Manager
Leigh Loyd, Senior Case Manager
Peggy Rochon, Senior Case Manager
Michelle Shanks, Senior Case Manager
Courtney Jones, Director, LAF & Senior Case Manager

CO-PAY RELIEF

Pam Cleck
CPR Director

Shauna Hatfield, LiveStrong Senior Case Manager
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