

Transplant Fundraising Program Introduction

The Transplant Fundraising Program (TFP) has been developed by the Georgia Transplant Foundation (GTF) to assist transplant candidates and recipients in financially preparing for ongoing costs associated with transplantation, primarily medication costs.

These accounts provide fundraising assistance and account management for transplant funds. Financial contributions are overseen by GTF staff and an Advisory Council that provides fiscal accountability to transplant clients and their contributors. In addition, detailed information about transplant accounts, including disbursements and contributions, are available upon request and are mailed out quarterly.

GTF offers two types of accounts:

Matched* accounts provide up to a maximum of a \$10,000 match and are used primarily for prescription medication costs. This type of account must be applied for and approved pre-transplant. Matched accounts are provided for fundraising dollars but have eligibility criteria, including: being a Georgia resident, applying pre-transplant, and exhibiting financial or insurance need. Clients with this type of account have one-year from their application approval date to raise funds eligible for the match (a maximum of \$10,000). Please note: you are reimbursed and matched AFTER the transplant, once you begin to buy/pay for your prescription post-transplant medications and/or approved post-transplant related expenses. You must have a fundraising account held at GTF to be eligible for the match.

Unmatched accounts are NOT matched. Unmatched accounts may be opened pre- or post- transplant and funds may be used for expanded transplant costs such as housing and travel as well as prescription medication expenses. You must have a fundraising account held at GTF to be eligible for this account.

Both Programs Offer:

- On-going fundraising advice
- Monthly fundraising workshops
- GTF based personal webpage for fundraising**
- Availability for online donations by credit card
- Reimbursements processed within thirty (30) business days of receipt
- Option of having post transplant medication and/or medication co-pays directly billed from a GTF-approved pharmacy to your GTF account

** GTF charges a 3% administrative fee for each deposit made to your GTF account.*

***There is a minimal bank fee of an average of 2.85% per transaction charged to the TFP client for credit card donations.*

PLEASE NOTE THE FOLLOWING:

- The application process can take up to thirty (30) business days to complete
- It is your responsibility to follow-up with GTF if you have not received a letter by mail regarding your TFP application in 30 business days
- It is your responsibility to return the signed contract if approved for TFP. You are **not** enrolled in the program if the signed contract is not mailed back to GTF

SUPPORTING DOCUMENTS TO INCLUDE WITH YOUR APPLICATION:

Proof of Georgia residency can be one of the following:

- Copy of your driver's license issued six (6) months prior
- A six (6) month old document with your current address, such as:
 - Bank statement
 - Utility bill

Proof of current income can be one of the following:

- A Social Security income statement
- Your most recent pay stub
- Copy of your most recent federal income tax return

Proof of insurance can be any of the following:

- Copy of your insurance card (front and back)
- Copy of your Medicare card and/or Medicaid card

Application Process

Step 1 - Fill out the application completely (at the back of this booklet). ***INCOMPLETE APPLICATIONS WILL NOT BE REVIEWED.*** Once you have completed the application, mail it to the Georgia Transplant Foundation at the address listed on the last page of the application.

You *must* include the following items with your application:

For a Matched Account:

- Proof of Georgia residency during the last six (6) months prior to the application date
- Proof of current income
- Proof of all health insurance

For an Unmatched Account:

- Proof of Georgia residency. If you do not reside in Georgia, provide proof that you are being transplanted in a hospital in Georgia
- Proof of current income
- Proof of all health insurance

Step 2 - GTF contacts your transplant center to verify your transplant status.

Step 3 - After the transplant center verifies transplant status, the completed application goes to a Review Committee.

Step 4 - After the committee meets and reviews the application, a letter is mailed to your mailing address (as indicated on the application) within thirty (30) business days regarding approval status.

Step 5 - If approved, you are required to sign and mail back a client agreement agreeing to the terms and conditions of the Transplant Fundraising Program. **You are not enrolled in the program if the signed contract is not mailed back to GTF. All of this must be completed pre-transplant for a matched account.**

Step 6 - Once GTF receives your signed contract, your account will be activated. You will then receive your welcome kit containing additional information regarding TFP, for example, how to make deposits, how friends and family can donate, how to set up your GTF personal webpage and other important information.

Fundraising Activity

GTF does not do the actual fundraising for you; you and your volunteers will conduct the actual fundraising campaign. GTF will serve as a consultant by providing ideas, personal webpage, resources, procedures and additional support.

Fundraising Workshops are taught monthly by GTF Staff at our office in Atlanta, as well as in areas around the state in conjunction with our Trends in Transplant (TNT) Conferences.

If you are enrolled in a MATCHED Account, you will have one (1) year from your application approval date to raise funds that will be eligible for GTF match.

You will have the ability to create a GTF based personal webpage. After acceptance into the program you will be given information on how to set up your personal fundraising page. This page can include a brief personal statement, photo and a calendar for future fundraising events. You will be able to direct friends and family to this page to make online donations directly into your GTF account and to find out more information about your upcoming fundraising events.

Depositing Funds Into Your GTF Account

Once you have been accepted into the Transplant Fundraising Program, your GTF account is opened and is ready to be used. There are three different ways to deposit money into your GTF (matched or unmatched) account:

1. Blue envelopes from the client

Once your fundraising account is set up, you will be provided blue deposit envelopes for sending in funds. **These blue envelopes are for TFP clients use only, not their contributors.** GTF will not mail acknowledgement (thank you) letters to the contributors of the checks/money orders mailed in the blue envelopes because it will assume that the client has received the checks/money orders first and has already acknowledged the donor with a letter of thanks.

2. From a third-party mailing

Any money sent to GTF in your honor, by a third party, will be deposited in your GTF account. All checks should be made out to Georgia Transplant Foundation with the memo section noting: "In Honor of (your name)." Checks should be mailed to GTF, 500 Sugar Mill Road, Suite 170-A, Atlanta, GA 30350. GTF will send a letter of acknowledgment for the contributions that are received directly in the GTF office.

3. Personal GTF webpage

Once you have been accepted into the program, you will be given information on how to set up your personal GTF-based webpage. You will be able to direct friends and family to this page to make online credit card donations directly into your fundraising account. When online contributions are made, the contributor will receive an email acknowledgement letter. *Please note that gifts made online by credit card will be subject to a minimum processing fee by the bank of 2.85% per transaction.*

- Deposits can be made by check, money order, or credit card online. No cash will be accepted.

- GTF charges a 3% administrative fee for each deposit made to your GTF account.

It is your responsibility to inform the TFP program administrators of any change of contact information i.e. phone number, address, change of transplant center, etc.

Transplant-Related Expenses

To decide if the Transplant Fundraising Program is appropriate for you, preview the transplant-related expenses listed below that can be reimbursed from your account. Please note that the matched account is to be used primarily for post-transplant prescription medication expenses. **The following are considered reasonable transplant-related expenses for which funds may be used as outlined in Transplant Fundraising Program guidelines:**

	Matched Account	Unmatched Account
Definition of "Transplant-Related Expenses"	Post-transplant expenses are defined as those reasonable expenses caused after the transplant has occurred.	Pre- and post- transplant expenses are defined as those reasonable expenses caused by the need for transplant and the transplant expenses incurred after the transplant has occurred
Reasonable Transplant-Related Expenses	<ul style="list-style-type: none"> • Post-transplant prescription medications necessitated by the transplant for the client • Medical bills, co-pays, travel and lodging related to transplant care for the client, subject to \$1,000 maximum • Please note that the <u>total maximum</u> reimbursement for post-transplant related expenses other than prescription medication is \$1,000 	<ul style="list-style-type: none"> • Prescription medications necessitated by the transplant for the client • Medical bills and co-pays related to the transplant for the client • Travel and lodging expenses during the client's transplant for the caregiver • Travel and lodging expenses for the client's follow-up medical examinations

Specific transplant costs outside of these guidelines can be considered and must be requested in writing at the time the Transplant Fundraising Program application is submitted. This request must be pre-approved. GTF specifically reserves the right in its sole discretion to pay only those expenses that it deems appropriate. You must seek reimbursement and utilize coverage under all insurance plans and government programs such as Medicare and Medicaid, before utilizing the funds in your GTF account.

These items are not considered transplant expenses and will not be reimbursed (this is not a complete list):

- Automotive repairs and maintenance
- Health club memberships or exercise equipment
- Rehab therapy not administered by a licensed therapist
- Personal products
- Tobacco products or alcoholic beverages
- Non-prescribed medicine
- Treatment taking place outside of the US
- Entertainment items (videos and toys)
- Clothing
- School expenses, learning aids, tuition or camp fees
- Postage
- Interest or finance charges
- Treatment taking place outside of the US
- Loss of income
- Any taxes due
- Legal fees
- Expenses unrelated to transplant

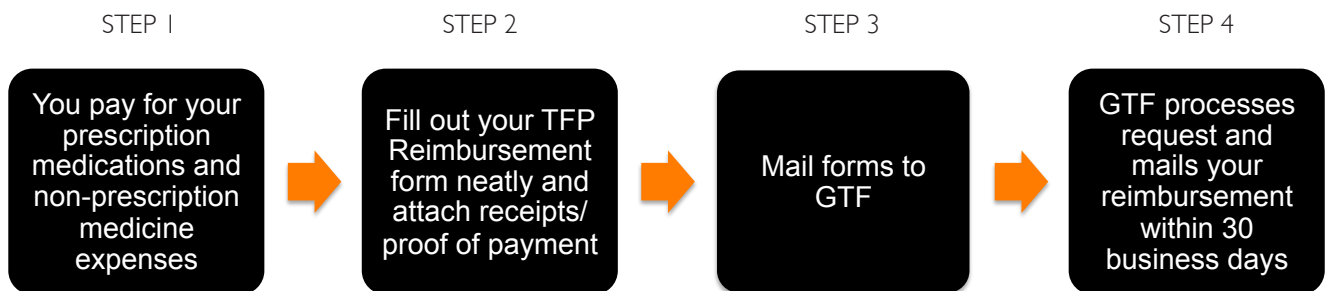
The final decision on eligibility rests with Georgia Transplant Foundation staff and the Transplant Fundraising Program Advisory Council. Please refer any questions regarding eligibility and reimbursement to the Transplant Fundraising Program staff at TFP@gatransplant.org or 770-457-3796.

Reimbursement of Expenses

General Reimbursement Guidelines

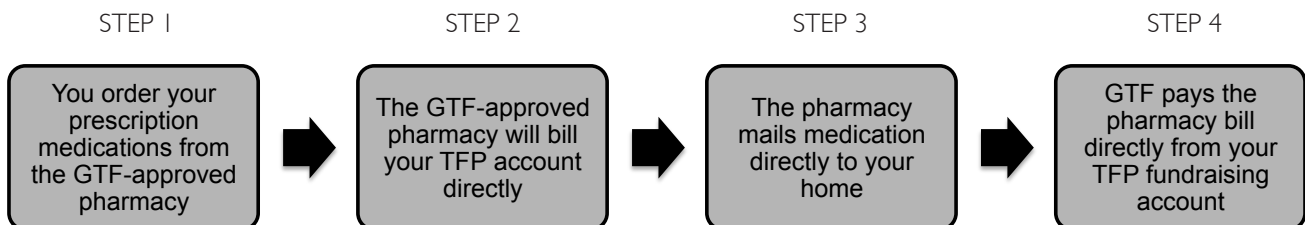
- All expenses to be reimbursed must be submitted with the TFP Reimbursement Request Form.
- The original itemized receipt for all expenses submitted. A detailed receipt must accompany credit card receipts.
- Receipts must be submitted within three (3) months.
- All requests must be submitted in a neat and organized fashion.
- All payments are contingent upon the amount of money in the client's account.
- The turn-around time for reimbursement is approximately thirty (30) business days after GTF receives the completed request.
- The client, client's volunteers and Georgia Transplant Foundation has a fiduciary responsibility to ensure that the money raised/deposited is used in the manner in which it was solicited.

REIMBURSEMENT FOR MEDICATION COSTS AND POST-TRANSPLANT RELATED EXPENSES



DIRECT PHARMACY BILLING

So that you don't have to pay up front and wait for reimbursement, the Georgia Transplant Foundation has a partnership with a GTF-approved pharmacy to supply your prescription medications, bill your insurance or Medicare/Medicaid and then bill your TFP account. *If you would like to take advantage of this program please indicate your preference on page 17 of the application and let your transplant team know your pharmacy preference when you are transplanted.*



All requests for funds for reimbursement must be submitted within three (3) months of expenditure, in writing and using the TFP Reimbursement Request Form accompanied by appropriate receipts/proof of payment.

GTF has no obligation to pay more expenses than it has money available in the specified account.

Accounting For Funds

GTF maintains audited financial records assuring fiscal accountability for money received and disbursed.

These funds will be disbursed by GTF for your transplant related expenses. Please reference GTF information for approved transplant related expenses.

GTF staff will oversee the deposits, administration and disbursement of all contributions.

In order to help defray the cost of its services, GTF will retain the interest earned on funds deposited.

GTF will maintain complete and accurate records of all funds raised and will provide a quarterly statement of all funds donated directly to GTF in honor of a client, all funds disbursed and any applicable bank fees. Please note the client will receive a quarterly statement only if the account had any activity (deposits/donations/disbursements) during the previous quarter. **Account balances will not be given by telephone.**

We acknowledge that all funds raised for the transplant have been donated by the patient, family, friends and/or the public, and that both the patient/client and GTF will be held strictly accountable by the public for all funds raised.

Not Transplanted, Too Sick To Transplant, or Failure to Survive

Untransplantable

In the event that a TFP client is not transplanted, becomes too sick to transplant, or recovers, all money remaining will be transferred to an **unmatched** account where unpaid, legitimate medical expenses will be reviewed for payment. *These reimbursements are not matched by GTF funds.* Legitimate medical expenses include prescription medication/co-pays, hospital deductibles/co-pays, doctor's co-pays, COBRA payments and insurance premiums.

Deceased

In the event that a TFP client passes away, all money remaining will be transferred into an **unmatched** account. The person authorized to request withdrawals, as indicated on the TFP Client Agreement, may submit a request for eligible medical expenses for a period of three (3) months after a client's death.

The GTF Advisory Council may disburse up to a maximum of \$5,000 towards funeral expenses paid directly to the funeral home. This disbursement is based on funds available in the client's account and it is not matched by GTF.

Based on review of need, GTF will consider paying mortgage or rent for the client's primary residence on file with GTF for one (1) month after the death of a client. This request must be in writing and proof of financial need must be demonstrated. This is not matched by GTF.

Should there be any funds remaining in your account following the above disbursements, the Advisory Council will authorize the transfer of funds to support the Georgia Transplant Foundation. These funds shall remain the property of the Georgia Transplant Foundation.

Funds disbursed under these guidelines are taken from the balance of your TFP account and are not eligible for GTF match. The above items are only payable to the extent there are funds in your TFP account.