



HEALTHWELL
FOUNDATION®

When health insurance is not enough.®



20

YEARS



2023 Year In Review

*Our Unwavering Commitment
to Assist Patients in Need*

2023 Year In Review:

20 Years of Help, Healing and Hope – Our Unwavering Commitment to Assist Patients in Need

2023 was a milestone year for the HealthWell Foundation. We proudly celebrated our 20th anniversary of providing help, healing and hope for America's underinsured. Over the past two decades, we have awarded more than \$4.1 billion in financial support to over 930,000 underinsured patients through more than 1.5 million grants.

While our impact has continued to multiply year after year, the rising cost of inflation and inherent financial burden that comes with a chronic illness means there is more to be done and more lives to be saved through our programs. That is why our commitment to providing access to life-changing, often lifesaving, medications to patients who have nowhere else to turn is unwavering.

Thank you to our individual and corporate donors for allowing the HealthWell Foundation to carry out our mission to ensure that those living with a chronic or life-altering condition have access to critical medical treatments they otherwise would not be able to afford because their health insurance simply is not enough. We cannot do this alone.

In 2023, we were honored to receive a record \$730+ million* in individual and corporate contributions. As a result of this generous support, we awarded over \$1 billion in medication copayment and insurance premium assistance through more than 217,700 grants to over 203,300 underinsured patients. We did this while continuing to achieve industry-leading operational efficiency of approximately three percent average operational overhead, while never using any donor dollars to pay administrative costs.

As we have done since our inception in 2003, HealthWell has continued to maintain the highest ethical standards as the cornerstone of our operations. We have worked rigorously to become the highly rated, trustworthy, efficient and transparent charitable patient assistance program we are today. Ensuring that the Foundation operates in full compliance and transparency with the highest ethical standards has positioned us as an industry leader. Year-over-year, our transparency and efficiency have continued to receive external recognition and in 2023, we were honored to:


- Rank 23rd on *Forbes'* 2023 list of The 100 Largest U.S. Charities.
- Be recognized by *Forbes* as one of only nine charities nationwide to achieve a 100 percent fundraising efficiency rating.
- Score 99 out of 100 on Charity Navigator's Encompass Rating System.
- Be awarded the 2023 GuideStar Platinum Seal of Transparency.
- Rank as a 2023 Top-Rated Charity by GreatNonProfits.



Funds Open In 2023

- Acromegaly
- Acute Myeloid Leukemia
- Alagille Syndrome Vitamins and Supplements
- Amyloidosis
- Amyotrophic Lateral Sclerosis
- ANCA-Associated Vasculitis, and Granulomatosis with Polyangiitis (formerly Wegeners)
- B-Cell Lymphoma – Medicare Access
- Blepharitis
- Bone Metastases – Medicare Access
- Breast Cancer – Medicare Access
- Cancer-Related Behavioral Health
- Cardiomyopathy – Medicare Access
- Chemotherapy Induced Neutropenia – Medicare Access
- Chronic Lymphocytic Leukemia
- Chronic Myeloid Leukemia – Medicare Access
- Colorectal Carcinoma – Medicare Access
- Congenital Sucrase-Isomaltase Deficiency
- Cushing's Disease or Cushing's Syndrome
- Cystic Fibrosis Treatments
- Cystic Fibrosis Vitamins and Supplements
- Dupuytren's Disease
- Emergency/Medical Workers Behavioral Health Fund
- Gastric Cancer – Medicare Access
- Giant Cell Arteritis or Temporal Arteritis – Medicare Access
- Gout – Medicare Access
- Gout Travel Fund
- Hepatitis C
- Hypercholesterolemia – Medicare Access
- Hyperoxaluria
- IgA Nephropathy
- Lambert-Eaton Myasthenic Syndrome
- Mantle Cell Lymphoma
- Melanoma – Medicare Access
- Multiple Myeloma – Medicare Access
- Multiple Sclerosis – Medicare Access
- Myelodysplastic Syndromes – Medicare Access
- Neurocognitive Disease with Psychosis – Medicare Access
- Non-Hodgkin's Lymphoma – Medicare Access
- Non-Small Cell Lung Cancer – Medicare Access
- Nontuberculous Mycobacterium – Medicare Access
- Ovarian Cancer – Medicare Access
- Pancreatic Cancer – Medicare Access
- Pediatric Assistance
- Peyronie's Disease
- Porphyrias
- Post Menopausal Osteoporosis – Medicare Access
- Prostate Cancer – Medicare Access
- Pulmonary Fibrosis
- Pulmonary Hypertension – Medicare Access
- Renal Cell Carcinoma – Medicare Access
- Sickle Cell Disease
- Small Cell Lung Cancer – Medicare Access
- Systemic Lupus Erythematosus
- Systemic Sclerosis with Interstitial Lung Disease
- Tardive Dyskinesia – Medicare Access
- Type 2 Diabetes
- Urea Cycle Disorders
- Urticaria
- Waldenstrom Macroglobulinemia
- Wilms' Tumor

In 2023, We Were Proud to Have:

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- Announced our designation as an official resource through the White House Cancer Moonshot initiative.
 - Launched or re-opened 24 funds, including new funds to assist patients with Blepharitis, IgA Nephropathy, Systemic Sclerosis with Interstitial Lung Disease, and Type 2 Diabetes.
 - Appointed long-term board member, David Knowlton, as our new Board Chair after our previous Board Chair, Stephen M. Weiner, stepped down and became Chief Compliance Officer.
 - Restructured our COVID-19 Frontline Health Care Workers Behavioral Health Fund as the Emergency/Medical Workers Behavioral Health Fund to provide financial assistance for behavioral health services for qualified emergency/medical workers.
 - Enhanced our online application, tools and web resources to streamline the grants process further.
 - Provided financial assistance to the families of over 2,300 children with chronic or life-altering conditions through our HealthWell Pediatric Assistance Fund®.
 - Assisted more than 155 oncology patients seeking behavioral health services through our Cancer-Related Behavioral Health Fund.
 - Continued to operate 60 funds in various disease areas, including multiple funds in oncology, and our special initiative funds in behavioral health and pediatrics.
 - Diversified and grown our individual donor base to over 80,200 donors with more than 18,400 giving in 2023, resulting in a record high year-end public charity percentage.
 - Continued to enhance our social media presence across all platforms resulting in over 13,000 followers, over 2,444,000 impressions, more than 36,000 engagements and over 19,000 clicks.
 - Educated more than 25,000 followers about people, programs and organizations changing how health care is delivered through our *Real World Health Care* blog, resulting in 29,435 page views in 2023.
 - Spread our message nationally with dozens of alliance partners, resulting in over 1.78 billion media impressions from placements in major news outlets, including Yahoo! Finance, Seeking Alpha, and MarketWatch.

Compliance – The Cornerstone of Our Operations

HealthWell has always operated in strict compliance with all federal regulations that govern charitable patient assistance programs (CPAPs). We support our oversight by the U.S. Department of Health and Human Services, Office of Inspector General (OIG), whose mission is to protect the integrity of federal health care programs through guidance on how CPAPs should be structured. Meeting and exceeding the requirements of all applicable laws and regulatory requirements in everything we do is the guiding principle by which we operate as a Foundation and by which our Board and staff operate as individuals. Failing in this mission is not an option. We believe our high ethical standards set us apart from many other CPAPs and are critical to maintaining the continued trust and support of our dedicated individual and corporate donors. HealthWell, like other independent CPAPs, receives the majority of our donations from the pharmaceutical industry and is required to operate independently from our corporate donors. To learn more about our OIG Opinions, financial reporting, and program audit summaries, visit: <https://www.healthwellfoundation.org/about/financials/>. To learn more about HealthWell's commitment to compliance, visit: <https://www.healthwellfoundation.org/about/compliance/>.



HWF Direct: Unwavering Commitment to High-Quality Customer Service



Our dedicated contact center, HWF Direct, LLC, was established to provide exemplary customer service to the tens of thousands of patients who contact us each year for assistance. Every year since 2018, we have set new records by implementing innovative programs to streamline the grants process further, establishing state-of-the-art performance metrics, enhancing staff development and engagement and empowering employees. These initiatives enable us to grow our programs and bolster professional growth as individuals and as a team. At HWF Direct, our top priority is to provide the highest quality customer service, ensuring that our specialists take the time needed to resolve caller issues within the first contact. We proudly provide a compassionate, compliant and completely satisfactory experience for those we serve.

In 2023, we were honored to welcome 48 new members to our team which now consists of more than 160 professionals ready to assist the more than 34,000 patients, caregivers, providers and pharmacies who contact us each month.

Our key performance metrics focus on providing compassionate, responsive, and quality care to every caller. Our high standards continue to be recognized by those we serve. In 2023, the team was proud to have:

- **Handled: 519,692 calls through our hotline while maintaining a call capture rate of 91%.**
- Maintained a 99% staff retention rate.
- Implemented an awards and recognition program for the staff and enhanced our performance management system for all employees.
- Grown our staff through internal promotions and welcomed 48 new hires.
- Created 219,227 grants via hotline, online applications and portal.
- Handled:
 - 136,614 documents submitted through our portals – 67% of our total volume.
 - 49,622 documents faxed to us – 24% of our total volume.
 - 18,542 documents received through mail – 9% of our total volume.
- Responded to:
 - 108,713 copay reimbursement/payment requests with an average processing time of 21 business days.
 - 23,279 premium reimbursement/payment requests with an average processing time of five business days.
 - 38,708 email questions/requests with an average response time of three business days.

Again, thank you to our individual and corporate donors for allowing the HealthWell Foundation to carry out our mission and meet the critical, sometimes lifesaving, needs of the patients who reach out to us for assistance.



Calls into hotline:
519,692



Calls handled by
specialists: **253,560**



Average monthly calls
handled by IVR: **13,035**



More than **34,000** callers
assisted each month



Average inbound call
capture rate: **91%**



Average call
9:30 minutes



Actively managed over
183,300 grants



We pride ourselves on
high-quality customer
service and ensuring that
our specialists take the
time needed to resolve
caller issues within the
first contact.

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Facebook.com/healthwellfoundation

 **INSTAGRAM:**
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