

## Guidelines for Financial Assessments and Reimbursement

### Reimbursement

Financial assessments should be offered to every patient prior to their first visit and their decision noted in the Reimbursement section in ATV. Financial assessments are not protocol specific. When a new protocol is added for a patient, the Reimbursement section must be filled out for those protocols as well, but a patient only needs one financial assessment per year.

- Search for patient
- Select *Reimbursement* tab
- Type in date patient informed of reimbursement policy
- Type in name of who informed patient of reimbursement
- Select *Response to reimbursement* from drop down menu (choices include accept reimbursement, decline reimbursement or request supplemental reimbursement)
- Select type of Supplemental Reimbursement: Financial, Medical or None.
  - If Financial is selected, the Social Work Department will complete a financial needs assessment
  - If Medical is selected, the Patient Support Services Department will review for medical needs
  - Any additional funds requested will need to be approved by the Deputy Clinical Director or designee.

### Financial Assessments

- Requests are entered through ATV and processed in the order they were received. The Social Work Department representative has 72 hours to process the request (approved, not approved or unable to contact).
- If there is a special need or circumstance, please include that in the ATV request or call/email the Social Work Department to provide the information.
- Responses are entered in ATV, and documented by the Social Worker, followed by a subsequent e-mail of the decision. ATV can be checked for a decision of financial need (Approved vs. Denied)
- Social workers make 3 attempts to reach patient, if no contact is made, ATV will send email notice to submitter. New financial assistance request can be entered if needed
- Must be renewed annually, there is no prompt in the system and must be tracked by the team or checked in ATV

## **Requesting Reimbursement for Travel Related Expenses (Meals, Lodging and/or Transportation)**

Voucher Requests for local transportation, meals, and lodging that are submitted are sent to the Patient Travel and Voucher Office for processing. The Social Security Number (SSN) **is required** for the patient to receive government funds and the patient will have to provide a photo ID to turn in the voucher for money at the NIH Cashier's Office.

Note: ATV system is not used to request the Safra Lodge.

### Lodging

- To enter a voucher (reimbursement) request:
  - Search for patient name
  - Choose Lodging type from drop down menu (Hotel, Children's Inn (Children's Inn ATV **must** be submitted **prior** to the patient checking in), other)
  - Type in dates for check in and check out
  - If patient is with a guardian, type in the guardian name and dates from and to
  - Search and type in protocol number
  - Type in justification if reimbursement exception is requested (see step 9)
  - Click *Submit* button when above information is filled in
  - Patient must go to voucher office in Main Lobby to pick up reimbursement
- To request a direct bill hotel:
  - Ensure financial assessment is current
  - Search for patient
  - Select "direct bill lodging at selected hotels" under "Government Arranged"
  - Select hotel preference under "reservation for"
  - Select check-in and check-out date
  - Select yes or no next to "pay for parking at the hotel" – note that exception must be approved by Cheryl prior to paying for parking
  - Select number of beds
  - Select appropriate answer next to "does the patient require a handicap-accessible room"
  - Select number of guests
  - Select protocol
  - Enter any appropriate remarks as necessary
- Direct bill Hotel reservations must be notified of a cancellation 24 hours prior to the check in to avoid charges to the IC. Staff or patient/family members may cancel reservations on their own using the confirmation number.

Note: During high tourist seasons (Cherry Blossoms Festival, US Open Golf Tournament, Easter, hotels may be full.

### Meals (Pediatric and transplant protocols only)

- To enter a meal request:
  - Search for patient name
  - Choose *Meal*
  - Type in the name of the person approved for meal reimbursement (patient name if patient receiving meal reimbursement or guardian name if guardian is receiving meal reimbursement)
  - Type in relationship (for example guardian or caregiver)
  - Type in amount of reimbursement (amount of reimbursement is \$8 per day for pediatric NCI patients and \$15 for caregivers. If requesting for a guardian and the patient type enter the total amount per day, for example \$23 per day)
  - If requesting meals for patient and guardian, enter in the remarks section “pay patient and guardian/caregiver for meals “ and enter the amount the patient is to receive and the amount the guardian is to receive.
  - If Guardian reimbursement is not covered by protocol on the DRTS form, written exception approval from the Deputy Clinical Director or designee is required and needs to be sent to the voucher office.
  - Type in dates for meal reimbursement
  - Search and type in protocol number
  - Type in justification if reimbursement exception is requested
  - Click *Submit* button when above information is filled in

### Transportation:

- To enter a transportation reimbursement request:
  - Search for patient name
  - Select *New request*
  - Under Patient Arranged and Reimbursed (local and long-distance)
  - Select travel Choose Travel method (car mileage, taxi, bus, etc.) – this includes reimbursing patient for checked luggage. Select “plane” and in notes write “do not reimburse for flights, please reimburse patient for 1 checked bag per flight”
  - Type in dates for travel
  - Search and type in protocol number
  - Choose type of travel from drop down menu (this is different request from government authorized travel)
  - Click *Submit* button when above information is filled in