



SCHOOL OF MEDICINE

DEPARTMENT OF
OBSTETRICS & GYNECOLOGY

Title: Special Delivery Fund Eligibility and Use Guidelines	Policy
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PURPOSE:

The Special Delivery fund was established to help Special Delivery patients and their families that lack the resources to purchase or provide necessary non-medical expenses during outpatient appointments or inpatient stays. Having the security these families need will allow them to concentrate on their upcoming delivery without financial crisis.

ELIGIBILITY:

In order to qualify for financial assistance through the Special Delivery Fund patients must demonstrate a financial need that is not covered or not covered in a timely manner through personal income, health insurance, or other social assistance programs.

Personal income inadequacy will be assessed by the following criteria:

1. The patient's income qualifies for one or more need-based government assistance programs. (e.g. Medicaid, disability, food assistance, etc.)
 - a. These criteria can be filled regardless of current enrollment in such programs or eligibility by immigration or citizenship status and is only a question of income level.
 - b. The evidence needed to establish these criteria could include tax returns, pay-stubs, or the interview and judgement of a social worker or case manager.

OR

2. The financial burden of the needed visit, treatment, device, hospitalization exceed available personal resources as determined by the interview and judgement of a social worker or case manager.
 - a. This includes cases where resources may be adequate for a patient and family members when at home but inadequate to support needs brought on by medical visits, or relocation.

Failure of coverage for need by other programs is defined below:



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1. The financial need is not addressed by other assistance programs or medical insurance. (e.g. Reimbursement for travel or travel arrangements are not provided by medical insurance despite appropriate requests, or food support is not covered through medical insurance in cases of relocation to Albuquerque for medical indications, etc)

OR

2. The need may be met at some point through insurance or other assistance programs but not in a timely manner to provide the necessary support. (e.g. food assistance approval is pending through medical insurance but will not be available for several days and the patient has no resources to obtain food otherwise).

The necessity of the desired assistance is defined below:

1. The financial need is based on medical needs as deemed by providers. (e.g. relocation from rural home to Albuquerque is necessary to decrease risk of complication, injury, or death and food support, lodging, transportation resources are needed to allow safe relocation)

OR

2. The financial need is based on a compassionate need for a patient affected by a pregnancy complication or concern. (e.g. lodging or food provided for family members who are visiting a hospitalized patient).

USE GUIDELINES:

The Special Delivery designee will work with providers, social workers, and case management to establish eligibility and need. The designee will then work with the OBGYN department to disburse funds in the decided manner (e.g. disbursement of previously purchased targeted gift cards or paying for needed services directly).

The special delivery designee will provide the department with a quarterly report outlining how the gift cards have been distributed. (Date of distribution, Description, Amount(s), no patient identifiers).



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All monies obtained by fundraising or external donation must be received through the University of New Mexico Foundation's Special Deliveries Fund, either online at <https://unmfund.org/fund/special-delivery-fund/> or by check. Checks should be made out to the "University of New Mexico Foundation" and indicate the fund name in the memo section. Checks can be mailed to: Two Woodward Center, 700 Lomas Blvd. NE., Albuquerque, NM 87102.

Additional guidelines for the use of the fund are noted below:

- Assistance can be provided in the form of direct payment of expenses (hotel, other bills), reimbursement for expenses incurred with receipt, or gift card(s).
 - Gift cards must be "targeted" to a specific store for specific needs (e.g. Food—Smith's, Walmart, etc.)
 - Visa gift cards or other types of cash cards are not allowable
- The per-patient limit has been set at \$1000 and this will be tracked by the designee.
 - If a patient receives \$600 or more within a calendar year, it is considered taxable income by the IRS. The patient will be required to fill out a form with their SSN, and will receive an IRS form 1099 from UNM.
- The department will work with the Special Delivery Fund designee to purchase gift cards when necessary. Other individuals who purchase gift cards on their own cannot be reimbursed.
- The gift cards purchased, direct payments and/or reimbursements are limited to the amount available in the fund.

Procedure for gift card disbursal:

1. Fund designee approves the purchase
2. Patient's case manager (or other designate) picks up the gift card from the Fiscal Services Tech
 - Transaction recorded in password-protected "SD" tracking sheet on network drives: Date/Patient Code /Case Manager/Amount.
3. Case manager has patient fill out Participant Receipt Form when gift card is delivered
 - There is no way to tell what the payment is for, so the patient's privacy is protected.
4. Case manager returns form to the Record Keeper (e.g. Fiscal Services Tech, or other administrator)
 - Record Keeper stores filled out forms and tracks per patient spending



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APPROVAL

Prepared by: Accounting

Approved by: Exec Committee

Approval:  _____
Chair, Department of Obstetrics & Gynecology _____ Date

SOP # / Version #	Effective Date	Supersedes	Review Date	Summary of Change(s)
2		Version 1		Moved \$600 threshold to USE GUIDELINES