

# Donor Shield Reimbursement Policy

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## Reimbursement Requirements (RR)

To receive reimbursement, the following conditions must be met:

- 1) **Request Reimbursement:** You will receive a Lost Wage and Donor Expense Reimbursement Invitation email from your donor center. The request for reimbursement must be completed and approved before submitting any claims.
- 2) **Donation Confirmation:** The donation must be recorded by the donor center before any claims are reimbursed.
- 3) **Document Requirements:**
  - a. All submitted documents and receipts must be readable.
  - b. Claims with unreadable documents will be declined in their entirety. No partial reimbursements will be issued.
- 4) **Certification:** Donors must certify that all submitted information is accurate.
- 5) **Payment Method:** ACH information is required for U.S. residents.
  - a. SWIFT information is required for payment to an international bank account.
  - b. Payments will only be made to bank accounts held in the donor's name.

## Lost Wage Reimbursement (LWR)

Donors covered by Donor Shield are eligible for reimbursement of lost wages under the following conditions:

- 1) **Maximum Limit:** Up to \$2,000 per week for a maximum of 12 weeks.
- 2) **Physician Approval:** Required for lost wage requests exceeding 3 weeks.
  - a. Additional weeks of LWR will only be given to donors with physically demanding jobs or complications during recovery from the surgery.
  - b. The claims for additional weeks may be submitted through the donor dashboard no more than 1 week before the current claim ends (e.g., at the start of week 3, a claim for week 4 can be submitted subject to physician approval).
- 3) **Eligibility Requirements:**
  - a. Must provide valid pay stubs or tax return documentation.
  - b. Must have a valid U.S. Social Security Number (SSN) or other valid Tax Identification Number (TIN).
- 4) **Tax Information:** Reimbursed lost wages are considered taxable income.
  - a. Official SSN or TIN documentation must be provided (tax document, SSN card, etc.).
  - b. A Form 1099 will be issued at year-end using the donor-provided SSN or TIN.
- 5) **Submission Guidelines:**
  - a. Claims must be submitted before the donation or within 60 days following the donation.
  - b. Pay stubs documenting gross income must be dated within 60 days prior to donation.
  - c. Name and SSN on the supporting documents must match the information in the reimbursement claim.
  - d. The tax form submission should be a single page that shows both the SSN and gross wages.
  - e. Circle or highlight the following required additional information:
    - i. Social Security Number (SSN)/Tax Identification Number (TIN)
    - ii. Paystub – pay period start and end dates
    - iii. Paystub/tax return – gross wages
  - f. Hourly employees must submit 3 pay stubs in a single PDF.
  - g. Salaried employees are required to submit 1 pay stub.
  - h. Self-employed donors are required to submit a single page from your prior year personal tax return or your 1099(s) showing SSN and gross wages.

- 6) **Payment Details:**
  - a. Payments will only be made to U.S. bank accounts held in the donor's name.
  - b. Payments will be made within 10 calendar days after the donation is confirmed for up to week 3.
  - c. Payments will be made within 10 calendar days after physician approval for any additional weeks (4+).

## **Donor Expense Reimbursement (DER)**

Donors covered by Donor Shield are eligible for reimbursement of donation-related expenses under the following conditions:

- 2) **Maximum Limit:** Up to \$6,000 for all combined expenses, including travel, lodging, meals, and dependent care.
- 3) **Submission Guidelines:**
  - a. Claims can only be submitted after a completed request for reimbursement and within 60 days following the donation.
  - b. Limit of 2 submissions per donor.
  - c. Receipts must be provided for all expenses with the requested amounts circled or highlighted.
  - d. Credit card statements will not be accepted in place of receipts.
- 4) **Expense Details:**
  - a. **Flights:**
    - i. Capped at 4 round trips in total between the donor and the donor's caregiver.
    - ii. Only flights between the donor's or caregiver's primary residence and the hospital are reimbursable.
    - iii. Caregiver receipts must clearly state the caregiver's name and address.
  - b. **Transportation Expenses:**
    - i. Capped at \$700 for car services, taxis, rideshares, car rentals, and parking.
  - c. **Self-Driving Mileage Reimbursement:**
    - i. Capped at 1,000 miles at the IRS standard rate (currently \$0.70/mile) for self-driving travel.
    - ii. Do NOT submit receipts for tolls and gas as they are covered in the mileage reimbursement.
  - d. **Meal Reimbursement:**
    - i. Capped at \$200 while away from home for the donation process.
    - ii. Meals at home and groceries are not covered.
  - e. **Hotel Reimbursement:**
    - i. Capped at 14 total nights between the donor and the donor's caregiver, unless a physician's note is included with the medical justification.
    - ii. If the caregiver has a separate lodging arrangement from the donor, please make note of the caregiver's name on the receipt.
  - f. **Dependent Care:**
    - i. Capped at \$1,500.
    - ii. Covers expenses for children, adult dependents, or pets while the donor is recovering from the donation.
    - iii. Receipts are required if provided by a care facility.
    - iv. If care is provided by an individual without a receipt, a signed handwritten receipt with the name of the dependent and expense breakdown will be required for reimbursement.
- 5) **Follow-Up Visits:** Expenses related to follow-up visits will only be covered within 30 days of the donor surgery.
  - a. We encourage all donors to complete at least 1 follow-up visit within 30 days of surgery.
- 6) **Exclusions:**
  - a. Prescription medications and doctor visit copays are not covered. Speak to your donor center regarding prescription medications and doctor visit copays.
- 7) **Tax Information:** Travel, lodging, meals, and dependent care reimbursements are generally tax-free and may not need to be reported on your tax return. Please be sure to discuss this with your tax advisor.
- 8) **Payment Details:**
  - a. Payments will only be made to U.S. bank accounts held in the donor's name.
  - b. Submitted claims will not be processed until after the donation is confirmed by the transplant center.
  - c. Approved claims will be reimbursed within 10 calendar days following the date of approval.

## **Donor Complications (DC)**

In the rare event that the donor experiences complications related to the donor surgery, the donor should contact their transplant center for medical care. If a donor complications reimbursement claim is needed, the transplant center must submit the paperwork and initiate the claim on the donor's behalf.