

Taking Care of Our Own Fund FAQs

For North American McKesson employees

Last updated: 9/2022

Through the McKesson Taking Care of Our Own Fund, we provide grants to North American McKesson employees facing hardships due to unexpected events, like natural disasters or family emergencies. It's a charitable program supported by the McKesson Foundation, McKesson, and donations from employees across the company. The Emergency Assistance Foundation (EAF) serves as our Fund's administrator. We offer two types of grants: *We Care Grants* and *Get You to Safety Grants*.

We Care Grant

These are \$500 - \$5,000 grants for personal hardships or government-declared disasters typically processed within 10 business days,

We offer the We Care Grant to eligible employees facing significant financial hardships from unexpected events. Examples of these types of events include family emergencies, natural disasters, epidemics, serious illnesses, or injuries affecting you and/or your immediate family. We Care Grants range from \$500 - \$5,000 and help with expenses not covered by insurance. To ensure we help colleagues who need it most, income eligibility guidelines apply.

How do I know if I am eligible?

- You must be an active McKesson employee working 20+ hours/week. You can be on an approved leave, including short-term disability, medical leave or paid-time off to be eligible.
- **Income eligibility guidelines apply** (i.e. household income within 400% of the Federal Poverty Level)
- **You must provide receipts or invoices for eligible expenses dated within 60 days of your application.**

PERSONS IN FAMILY /HOUSEHOLD	2022 POVERTY GUIDELINES FOR THE 48 CONTIGUOUS STATES AND THE DISTRICT OF COLUMBIA	400% OF FPL
1	\$13,590	\$54,360
2	\$18,310	\$73,240
3	\$23,030	\$92,120
4	\$27,750	\$111,000
5	\$32,470	\$129,880
6	\$37,190	\$148,760
7	\$41,910	\$167,640
8	\$46,630	\$186,520

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What types of events are eligible for grants?

- Natural or man-made disasters
- Epidemics
- Accidents
- Illness or injury
- Medical expenses not covered by insurance
- Violent crimes
- Domestic abuse
- Death of employee or their immediate family member

What kinds of expenses may be eligible for grants?

The Fund covers only expenses caused by one of the qualifying events above. It assists with immediate, basic needs. These include:

- Food – Immediate Needs (dollar amount calculated on family size and location for 30 days)
- Clothing
- Housing (temporary housing, mortgage or rent assistance, reasonable repairs for damaged property, etc.)
- Essential appliances and furnishings
- Essential utilities (gas, water, and electricity) for primary residence
- Transportation (repairs other than routine maintenance, cost of commercial transportation, car rental)
- Travel expenses related to medical care
- Medical expenses, including prescription medications not covered by insurance
- Unexpected dependent care
- Reasonable funeral, travel, and burial expenses
- Unable to work due to the event (\$500 lump sum)

What kinds of expenses are not eligible for grants?

- Mortgage payment increases, such as from interest rate increases or escrow increases
- Inability to pay rent/mortgage/utilities due to accumulated expenses not associated with an eligible event
- Routine car maintenance/unexpected car repairs
- Routine home maintenance/unexpected home repairs
- Supplies or wi-fi access for children who receive lessons online while their schools are closed

Epidemic: What do I need to know to apply?

Financial assistance is intended to help people who are ill, quarantined or impacted by schools and businesses being closed for an extended period of time. Documentation during the application phase with the standard grant would need to include:

- Notification of quarantine
- Notification of school closure that impacts employee
- Notification of business closure that impacts employee
- Doctor's note confirming illness

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What does “Unable to work due to the event” mean?

We consider you “unable to work due to the event” if you are forced to take 5 or more days off from work. These days off must be due to a serious illness or injury of you or your dependent, or if you are the victim of a violent crime.

Is counseling an eligible expense for a *We Care Grant*?

If you have counseling needs, please contact our Employee Assistance Program (EAP):

- **U.S.-based employees:** please call 888-425-6174 or visit www.resourcesforliving.com. The username is McKesson and the password is eap.
- **Canada-based employees:** please call 877-847-4525 or visit www.aetnaeap.com. The username is McKesson Global, and the password is eap.

Can I use a *We Care Grant* for medical expenses?

Yes, you can. You may use a *We Care Grant* for medical expenses that aren’t paid by insurance. These could relate to a serious illness or injury. Or they might be non-routine expenses like substance abuse treatment (including opioid-related).

Besides medical expenses, a *We Care Grant* can help cover the cost of medications. You can also use it for travel or lodging, if you are seeking treatment away from home.

All treatments and medications must be prescribed by a licensed medical professional.

What if I have financial difficulties but don’t meet the requirements for the Taking Care of Our Own Fund?

Our McKesson’s Employee Assistance Program (EAP) can help. Our EAP provides a wide range of professional services – financial and legal advice, assistance in creating a will, childcare referrals, eldercare services and counseling – 24 hours a day, 365 days a year, at no cost to you.

- **U.S.-based employees:** please call 888-425-6174 or visit www.resourcesforliving.com. The username is McKesson, and the password is eap.
- **Canada-based employees:** please call 877-847-4525 or visit www.aetnaeap.com. The username is McKesson Global, and the password is eap.

How do I apply for a *We Care Grant*?

If you feel you fit the criteria for a *We Care Grant*, complete the online application form at www.mckessoncares.org. If possible, please view using Google Chrome as your browser. **Provide detailed information and supporting documentation on your expenses.** You must submit a complete application to be considered for a grant.

EAF will review your application. Once your application is complete, EAF will follow-up with you via email within 3-5 business days. Processing times:

- Electronic check: 5 business days
- Electronic fund transfer: 10 business days
- Check payment: 13 business days

Please note: EAF can’t make payments without copies of current bills or invoices. For medical expenses, an Explanation of Benefits is not a bill. If documentation or signatures are missing, or if other information is needed, processing will take longer.

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Please double-check your application before sending it for review. EAF will notify you by email if anything is missing from your application.

How does it work?

1. *Register:* Register at <http://www.mckessoncares.org> and receive an application link.
2. *Apply:* Complete the application
3. *Submit:* Submit application. EAF will then send you an email confirmation from applicantssupport@emergencyassistancefdn.org confirming receipt. Please add this email address to your contacts.
4. *Review:* EAF will review your application. If EAF has any follow-up questions, they will contact you by email within 3 business days.
5. *Award notification:* After EAF receive all documents, EAF will email you with the decision, usually within 5 business days. If your application is not approved, EAF will note the specific reason.
6. *Grant processing:*
 - If approved, expect EAF to follow up with you within 1-2 business days with a secure DocuSign email. The DocuSign email will ask you to provide your banking information or address for the grant check to be mailed. To reduce the risk of checks getting lost in the mail and for quicker payment, we recommend you provide your banking information if possible.
 - After you complete the DocuSign, EAF will issue an electronic fund transfer to your bank account within 1-2 days. If you opt for a check, please allow 6-8 days.
 - If payment is going to a vendor, such as mortgage company or rental agency, EAF's email will include this information. EAF can pay vendors with a credit card or check (up to 6-8 business days for receipt). Please follow up with your vendor to confirm that they've received the payment.

How much can I apply for?

You can apply for up to \$5,000 per event. The maximum is \$10,000 or two applications in a 12-month period.

Are the grants taxable?

In the U.S., the grants are generally not considered taxable income. Outside of the U.S. they may or may not be taxable. If you have any specific questions about your situation, please consult an independent advisor, as the Fund and EAF cannot provide tax or legal advice.

Do I have to repay the grant?

No. Amounts granted under the Fund are not loans, so you never need to pay them back.

Can I apply on behalf of another employee?

If an employee is incapacitated, a family member or manager can apply on their behalf.

Will my information remain confidential?

Yes. We only use your personal information to determine your eligibility for a grant and to determine the amount of the grant. The Emergency Assistance Foundation, Inc. reviews applications for McKesson and treats them as confidential.

EAF reports non-identifying statistical information to McKesson to help us improve the Fund. You can opt-in to share your story with McKesson if you choose. If you are applying for medical expenses, your personal medical information won't be shared with McKesson.

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Who counts as my eligible dependents?

Eligible dependents include your spouse/domestic partner, minor children and other dependents for whom you are financially responsible.

Parents, grandparents or other relatives are not considered dependents, unless you can show that you claim them as a dependent on your tax forms.

Do you offer assistance for family members who aren't my dependents?

No, but you could be eligible for assistance if you are financially responsible for funeral, burial or travel expenses due to the death of an immediate family member. We define eligible immediate family member as any of the following:

- Spouse or partner in a civil union or domestic partnership
- Parent
- Child
- Sibling
- Grandparent
- Grandchild
- Spousal grandparent
- Aunt, uncle, niece or nephew
- Father-in-law or mother-in-law
- Brother-in-law or sister-in-law
- Son-in-law or daughter-in-law

Can I donate to the Fund?

Yes. Anyone can donate to the Fund. Please view our [Donation FAQs](#) for more information.

Is my donation tax-deductible?

Yes. Save your receipt for tax purposes.

I donated to the Taking Care of Our Own Fund, but didn't get a receipt. How and when can I get proof of my donation?

If you donate to the [Taking Care of Our Own Fund](#) via credit card, you'll receive an email confirming your donation.

Who can I contact with questions?

If you have questions or concerns about your application, contact us at mckessonfoundation@mckesson.com.

Get You to Safety Grant

These are \$1,000 evacuation assistance grants for government declared disasters. Approved applications can be paid within 24-48 hours. Expect your application to be reviewed and processed within three business days or sooner.

To be approved, you must meet the following criteria:

- You are a McKesson U.S. or Canada employee who works 20+ hours weekly. (You can apply if you are on approved leave, including short-term disability, medical leave, or paid/unpaid time off.)
- Your county issued a mandatory evacuation order for your primary residence; your primary residence is in an

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- area impacted by a government-declared disaster.
- You were evacuated, displaced or stranded by a government-declared disaster.
- **Note: If you are based in the U.S., the incident needs to be declared by FEMA on the [FEMA website](#) to qualify.**
- You have immediate food, water, shelter, clothing, transportation, medical assistance, or other basic needs as a result.

There are no income requirements for this grant. If you meet the criteria above, you're welcome to apply. One grant per household.

How do I apply?

Go to www.mckessoncares.org and click on the Apply Now button under the Get You to Safety Grant paragraph. (You can also go to www.irpstart.com to access it.)

1. **Select the McKesson Taking Care of Our Own Fund**
2. **Enter the provided code in the access code field.** (An access code will be shared when Get You to Safety grants are opened up for a specific disaster or event.)
3. **Select the appropriate program for your state**
4. **Complete the one-page online form.** *(It should take you less than a minute to complete.)*
You will need to check a few certifications and provide the following information in the form, then hit Submit:
 - Legal First Name
 - Legal Last Name
 - Email
 - **IMPORTANT: Last four characters only of your Employee ID (EID).** It may include both letters and numbers. **For example: "g2ps."**
 - Birth year

NOTE: Please follow the above instructions closely so EAF can verify your eligibility. Incorrect information will cause delays in processing your grant payment.

5. **Add apps@echeck.com to your contacts list.** (We want to make sure your electronic check isn't caught in your spam or junk folder.)

What happens after I apply?

- Immediately after you submit your application, you'll receive the autoresponder shown below from EAF.
- While EAF's autoresponder mentions a processing time of 3-4 days, we are working with them to process your application sooner, within 24-48 hours. (We're also working with EAF to try and customize their autoresponder to the extent we can.)
- Once approved, app@echecks.com will send you an email containing your electronic check. **Friendly tip:** make sure app@echecks.com isn't caught in your junk or spam folders!

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From: No Reply EAF [mailto:irp@emergencyassistancefdn.org]
Subject: [EXTERNAL] Your IRP Submission with EAF
Dear [Applicant Name],

Thank you for submitting your Immediate Response Program (IRP) application. Your IRP submission is under review.

Once you are verified to be a member of the charitable class and meet the IRP criteria your application can be approved, and a grant awarded. Most grants are funded by an Electronic Check which will be sent to you via email to the address you provided. The processing time for your application is normally 2-3 days if the verification information is available to the Emergency Assistance Foundation team from your Fund's representative and if Electronic Checks are able to be used (your Fund chooses the approved method to access your grant).

If your application is not verified or able to be awarded you will receive an email within 30 - 45 days to notify you.

Thank you,
The Emergency Assistance Foundation

I'm approved! What do I do with my electronic check?

Once approved, you should receive an email from app@echecks.com with your electronic check. You have two options.

a. Deposit the electronic check on your cell phone through mobile deposit. Here's how:

- 1) Download your bank's app to your cell phone and create a username and password.
- 2) Take a photo of your check.
- 3) Open your bank's mobile app and go to the screen that accepts mobile deposits.
- 4) Follow the instructions to upload the photo of your check.

b. If you don't have mobile deposit, you can print a copy of the check and deposit it as you normally would in the bank.

- 1) To print the check, click on the green **Open this check** button.
- 2) Print the check using any printer and cut along the dotted line.
- 3) Endorse and deposit as you would any paper check.

If you have any questions, please call Deluxe eChecks support at 877.333.6964 or email support@deluxechecks.com.

What sorts of disasters are covered?

Our Get You to Safety Grants are intended to help cover evacuation costs related to large-scale natural and manmade disasters. These may include events such as floods, hurricanes, earthquakes, fires, droughts, blizzards, and volcanic activity. They may also include events such as structural collapses, industrial / chemical accidents, or terrorist activity.

Who can I contact if I have questions about the Fund?

Contact the Fund administrator, Emergency Assistance Foundation directly at mckesson@emergencyassistancefdn.org, or (866) 278-2932.

Who can I contact if I have questions about donating to the Fund?

Contact the McKesson Foundation at mckessonfoundation@mckesson.com.