

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

## Public and Media Data Report

Type of Activity	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	5	2	2	7	<b>16</b>
Estimated Number of Attendees	194	35	97	185	<b>511</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	0	2	0	0	<b>2</b>
Estimated Number of Attendees	0	550	0	0	<b>550</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	<b>0</b>
Estimated Number of Attendees	0	0	0	0	<b>0</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	3	0	0	<b>3</b>
Estimated Number of Attendees	0	45	0	0	<b>45</b>
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	<b>0</b>
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	<b>0</b>
Enrollment Assistance with Part D	0	0	0	0	<b>0</b>
Enrollment Assistance with LIS	0	0	0	0	<b>0</b>
Enrollment Assistance MSP	0	0	0	0	<b>0</b>
Enrollment Assistance with Other Medicare Program	0	0	0	0	<b>0</b>
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	<b>0</b>
Estimated Number of Attendees	0	0	0	0	<b>0</b>
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	<b>0</b>
Estimated Number of Attendees	0	0	0	0	<b>0</b>
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	<b>0</b>
Estimated Number of Persons Reached	0	0	0	0	<b>0</b>

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

### Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

### Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Other Print Activity (newspaper articles, fliers, pamphlets, etc.)</b>					
Total Number of Print Activities	0	0	0	0	0
Estimated Number of Targeted Persons Reached	0	0	0	0	0
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	1	0	0	1
Total Hours for Length of Activities	0.00	6.00	0.00	0.00	6.00
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>Other Presenters</b>					
Total Presenters	5	6	2	7	20
Total Hours for Length of Activities	20.45	52.30	3.30	12.50	88.55
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	3	6	1	8	2
Employer Termination - COBRA	0	0	0	1	1
General HICAP Information	0	0	0	1	1
Grievances / Appeals - Plan Issues	5	7	2	7	21
Long-Term Care / Insurance	1	1	0	0	2
Low Income Subsidy (LIS) / Application Assistance	3	4	0	1	8
Medicare (Parts A & B)	4	3	1	7	15
Medicare Advantage (Part C)	4	7	2	7	20
Medicare Fraud / Abuse	4	7	2	7	20
Medicare Prescription Drug Coverage (Part D)	0	1	0	7	8
Medigap / Medicare Supplements	4	7	2	6	19
Non-Medicare Fraud/Abuse	4	5	2	7	18
Other Topics / Issues (Health Specific)	0	0	0	0	0
	3	2	1	7	13

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

**Program: PSA 5 - Senior Advocacy Services - HICAP**

From: 07/01/2010 To: 06/30/2011

### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	<b>0</b>
Preventive Care Benefits	4	7	1	7	<b>19</b>
QMB/SLMB/QI	4	4	1	7	<b>16</b>
Volunteer Recruitment	0	0	0	5	<b>5</b>
<b>Targeted Audience</b>					
African American	0	1	0	1	<b>2</b>
American Indian or Naitave Alaskan	0	2	1	0	<b>3</b>
Asian Indian	0	0	1	0	<b>1</b>
Caucasian	5	6	2	6	<b>19</b>
Chinese	0	0	0	0	<b>0</b>
Disabled	1	2	1	5	<b>9</b>
Dual Eligible Groups	0	0	0	1	<b>1</b>
Employer Related Groups	3	6	0	1	<b>10</b>
Family Member/Caregiver of Beneficiary	2	3	1	6	<b>12</b>
Filipino	0	0	0	0	<b>0</b>
Guamanian or Chamorro	0	0	0	0	<b>0</b>
Hispanic / Latino	0	3	1	2	<b>6</b>
Hmong	0	0	0	0	<b>0</b>
Japanese	0	0	0	0	<b>0</b>
Korean	0	0	0	0	<b>0</b>
Low Income	4	4	1	6	<b>15</b>
Medicare Beneficiaries	2	6	2	7	<b>17</b>
Medicare Pre-Enrollees	0	0	1	3	<b>4</b>
Mental Health	0	2	1	2	<b>5</b>
Mental Health Professionals	0	0	1	1	<b>2</b>
Native Hawaiian	0	0	0	0	<b>0</b>
Other	0	0	0	0	<b>0</b>
Other Asian	0	4	0	0	<b>4</b>
Other Pacific Islander	0	1	0	0	<b>1</b>
Partnership Outreach	0	0	0	0	<b>0</b>
Presentations to Groups in Language Other than English	0	1	1	2	<b>4</b>
Rural	0	1	1	3	<b>5</b>
Samoan	0	0	0	0	<b>0</b>
Socail Work Professionals	0	0	2	6	<b>8</b>
Some Other Race or Ethnicity	0	0	0	0	<b>0</b>
Vietnamese	0	0	0	0	<b>0</b>

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

### Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

#### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	<b>0</b>
<b>Literature from Events</b>					
General HICAP Brochure	180	274	97	212	<b>763</b>
"Taking Care of Tomorrow"	0	0	0	0	<b>0</b>
Other Publications (Created by or on Behalf of Local HICAP)	501	1,056	89	640	<b>2,286</b>
<b>Other Literature</b>					
Other Literature	0	0	0	0	<b>0</b>
Brochures from Quick Call	4	0	1	2	<b>7</b>

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	169	271	183	179	<b>802</b>
Total Finalized Intakes	47	54	56	68	<b>225</b>
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	16	19	12	12	<b>59</b>
Aging into Medicare Postacd - CDA HICAP	0	0	0	1	<b>1</b>
CDA HICAP	0	0	0	3	<b>3</b>
CHA	0	0	1	0	<b>1</b>
CMS/Medicare	2	1	5	7	<b>15</b>
Friend/Relative	9	3	4	10	<b>26</b>
InfoVan	0	0	0	0	<b>0</b>
Internet	0	3	0	0	<b>3</b>
Mailings	0	0	0	0	<b>0</b>
Media	2	0	0	3	<b>5</b>
Other	13	15	25	22	<b>75</b>
Presentations	1	2	3	1	<b>7</b>
Previous Contacts	0	0	3	6	<b>9</b>
State Website	0	0	0	0	<b>0</b>
Missing/Not Collected	4	11	3	3	<b>21</b>
<b>Mode of Client Contact</b>					
Quick Call Contacts	151	302	180	152	<b>785</b>
Contacts by Telephone	37	37	37	32	<b>143</b>
Contacts In Person at home	0	0	0	0	<b>0</b>
Contacts In Person at site	24	30	23	41	<b>118</b>
Contacts by E-Mail	29	29	12	3	<b>73</b>
Contacts by Mail/Fax	0	0	16	7	<b>23</b>
<b>Total Number of Client Contacts:</b>	<b>241</b>	<b>398</b>	<b>268</b>	<b>235</b>	<b>1,142</b>
<b>Contact Status Types</b>					
General info	0	0	16	35	<b>51</b>
Detailed Assistance	0	0	48	41	<b>89</b>
Problem Solving/Resolution	0	0	12	17	<b>29</b>
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	1.30	3.30	2.30	4.00	<b>10.90</b>
Volunteer	0.00	0.00	0.00	3.00	<b>3.00</b>
Paid	0.00	0.00	0.00	0.00	<b>0.00</b>
In-Kind	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	0	0	0	0	<b>0</b>
<b>Race</b>					
African American/Black	1	0	0	0	<b>1</b>

From: 07/01/2010 To: 06/30/2011

### Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	0	0	0	0
Caucasian/White	40	43	51	57	191
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	1	0	0	1
Chinese	2	0	0	0	2
Filipino	0	0	0	0	0
Japanese	0	0	0	1	1
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	0	0	0	0	0
Other Pacific Islander	0	0	0	0	0
Other Asian	0	0	0	0	0
Two or More Race	0	0	0	0	0
Some Other race	0	0	0	0	0
Not Collected	4	10	5	10	29
<b>Gender</b>					
Female	24	27	34	33	118
Male	19	12	17	26	74
Not Collected	4	15	5	9	33
<b>Monthly Income</b>					
Less than 150% of FPL	7	8	10	8	33
Equal To/Greater than 150% of FPL	17	15	24	22	78
Not collected	23	31	22	38	114
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	3	5	8
At or Above LIS Asset Limit	0	0	0	1	1
Not Collected	47	54	53	62	216

From: 07/01/2010 To: 06/30/2011

### Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	0	3	3	2	8
Limited English Proficient (LEP)	0	0	0	0	0
Dual Eligible	4	2	8	8	22
Medicare Status Due to Disability	5	5	5	7	22
Dual Eligible due to Mental Disability	0	0	0	1	1
Applying/Receiving Social Security/Medicare Disability	0	0	3	7	10
<b>Age</b>					
Under 60	4	2	3	3	12
60-64	1	5	3	22	31
65-74	17	10	38	29	94
75-84	9	2	6	4	21
85+	1	2	0	0	3
Not Collected	15	33	6	10	64
<b>Marital Status</b>					
Married	17	10	20	22	69
Never Married	1	8	2	9	20
Separated	0	0	0	1	1
Divorced	9	8	9	9	35
Widowed	4	4	4	2	14
Domestic Partner	0	2	1	1	4
Not Collected	16	22	20	24	82
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	4	3	2	2	11
Estimated Dollars Saved	\$2,340.00	\$6,000.00	\$20,260.00	\$3,161.00	<b>\$31,761.00</b>

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
<b>Medicare Parts A&amp;B (Original Medicare)</b>					
Enrollment/Eligibility/Screening	14	8	24	33	79
Benefit Comparisons/Explanation/Coverage Changes	13	7	15	29	64
Appeals/Grievances	0	0	1	2	3
Billings/Claims	4	4	2	2	12
Fraud/Abuse	0	0	0	0	0
Quality of Care	0	0	0	0	0
<b>LTC/LTCI</b>					
Enrollment/Eligibility Assistance	2	1	0	0	3
Billings/Claims	0	0	1	0	1
LTC Partnership	0	0	0	0	0
Appeal/Grievances	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	0	0	0
<b>Medigap/Supplement/SELECT</b>					
Enrollment/Eligibility/Screening	16	17	26	32	91
Benefit Explanation	10	15	17	34	76
Appeals/Grievances	0	0	0	0	0
Billings/Claims	3	1	1	0	5
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	1	0	0	1	2
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	3	20	23
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)</b>					
Eligibility/Screening	9	16	20	29	74
Benefit Explanation	8	12	14	33	67
Appeals/Grievances	2	0	1	2	5
Billings/Claims	2	0	1	1	4
Fraud/Abuse	1	0	0	0	1
Coverage Changes/Disenrollment	0	1	2	1	4
Plan Non Renewal	0	0	1	0	1
Plan Comparison	0	0	4	20	24
Enrollment/Enrollment Assistance	0	0	2	1	3
Quality of Care	0	0	2	1	3
Marketing/Sales Complaints or Issues	0	0	0	0	0
<b>Medi-Cal</b>					
Medi-Cal Screening (SSI, Nursing Home)	0	0	0	0	0
Medi-Cal Application Assistance	0	0	1	0	1

From: 07/01/2010 To: 06/30/2011

### Topics/Needs Discussed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
MSP Screening (QMB, SLMB, Q-1)	0	1	1	3	5
MSP Application Assistance	0	0	2	4	6
Medi-Cal/QMB Claims	0	0	1	0	1
Fraud/Abuse	0	0	0	0	0
Other	4	8	5	4	21
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	9	4	7	3	23
Military Benefits	0	2	1	1	4
COBRA	1	3	1	2	7
Mental Health Topics	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	0	0	0	1	1
Other	3	6	2	1	12
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	0	25	39	64
Eligibility/Screening	20	18	24	21	83
Plan Comparison	17	22	16	22	77
Enrollment/Anrollment Assistance	1	2	5	3	11
Billings/Claims	1	0	2	1	4
Coverage Changes	1	3	1	0	5
Re-enrollment	0	0	0	0	0
Disenrollment	0	0	0	0	0
TROOP	0	0	0	0	0
Other	7	1	4	4	16
<b>LIS / Extra Help</b>					
Eligibility / Screening	2	3	2	3	10
Benefit Explanation	0	0	1	1	2
Application Assistance	2	2	2	1	7
Claims/Billings	0	0	1	1	2
Appeals / Grievances	0	0	0	1	1
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	1	0	0	0	1
PPARx	1	0	0	0	1
Military Drug Benefit	0	0	0	0	0
Manufacturer Program	1	0	0	0	1
Other	1	0	0	1	2
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	0	0	1	1	2
Lag Time	0	0	1	0	1
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0

From: 07/01/2010 To: 06/30/2011

### Topics/Needs Discussed

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Marketing Fraud/Abuse	1	0	0	0	1
Agent fraud/abuse	1	0	0	0	1
Formulary problems/changes	1	0	1	1	3
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	1	0	0	0	1
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	0	0	0
Client reached donut hole	0	0	0	1	1
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	1	1	2
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

### Program: PSA 5 - Senior Advocacy Services - HICAP

From: 07/01/2010 To: 06/30/2011

### Complaints Filed

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	0	0	0	0	0
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	0	0	0	1	1
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	0	0	0	1	1
<b>All Other Complaints</b>					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
<b>TOTAL ALL OTHER COMPLAINTS</b>	0	0	0	0	0
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	0	0	0	1	1
Total duration of calls	0.00	0.00	0.00	0.00	0.00