

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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

Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
Type of Activity	Q1	Q2	Q3	Q4	
Interactive Presentations to Public in Person					
Total Number of Events	13	23	8	7	51
Estimated Number of Attendees	292	309	207	118	926
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	6	5	3	9	23
Estimated Number of Attendees	2,176	1,285	1,050	11,146	15,657
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Mobile InfoVan Events					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Dedicated Enrollment Events					
Total Number of Events	0	0	16	0	16
Estimated Number of Attendees	0	0	186	0	186
Estimated Number of Persons Received Any Enrollment Assistance	0	0	178	0	178
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	2	0	2
Enrollment Assistance MSP	0	0	146	0	146
Enrollment Assistance with Other Medicare Program	0	0	30	0	30
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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
Other Print Activity (newspaper articles, fliers, phamplets, etc.)					
Total Number of Print Activities	0	0	0	0	0
Estimated Number of Targeted Persons Reached	0	0	0	0	0
Presenters					
HICAP Paid Staff					
Total Presenters	0	0	26	10	36
Total Hours for Length of Activities	0.00	0.00	134.40	40.30	174.70
HICAP In-Kind Paid Staff					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
HICAP Volunteer Staff					
Total Presenters	0	0	17	12	29
Total Hours for Length of Activities	0.00	0.00	87.20	49.50	136.70
Other Presenters					
Total Presenters	0	0	14	3	17
Total Hours for Length of Activities	0.00	0.00	44.40	15.15	59.55
Area of Focus					
Dual Eligible with Mental Illness	0	0	0	1	1
Employer Termination - COBRA	0	0	0	0	0
General HICAP Information	17	28	27	16	88
Grievances / Appeals - Plan Issues	1	0	0	0	1
Long-Term Care / Insurance	1	2	3	4	10
Low Income Subsidy (LIS) / Application Assistance	15	26	10	12	63
Medicare (Parts A & B)	9	19	3	12	43
Medicare Advantage (Part C)	9	20	5	12	46
Medicare Fraud / Abuse	0	1	0	0	1
Medicare Prescription Drug Coverage (Part D)	8	21	6	14	49
Medigap / Medicare Supplements	6	18	5	9	38
Non-Medicare Fraud/Abuse	0	0	0	0	0
Other Topics / Issues (Health Specific)	2	7	1	1	11

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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	2	2
Preventive Care Benefits	0	1	23	12	36
QMB/SLMB/QI	16	26	23	13	78
Volunteer Recruitment	0	0	2	5	7
Targeted Audience					
African American	3	6	4	5	18
American Indian or Naitave Alaskan	0	0	0	0	0
Asian Indian	0	0	4	3	7
Caucasian	12	19	10	14	55
Chinese	0	0	19	12	31
Disabled	6	6	4	2	18
Dual Eligible Groups	0	0	13	0	13
Employer Related Groups	7	8	1	4	20
Family Member/Caregiver of Beneficiary	9	9	19	9	46
Filipino	0	0	9	3	12
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	7	7	17	10	41
Hmong	0	0	0	0	0
Japanese	0	0	0	1	1
Korean	0	0	0	0	0
Low Income	9	10	15	3	37
Medicare Beneficiaries	8	13	3	7	31
Medicare Pre-Enrollees	0	0	3	11	14
Mental Health	2	0	3	1	6
Mental Health Professionals	0	0	0	2	2
Native Hawaiian	0	0	0	0	0
Other	0	0	1	0	1
Other Asian	4	15	5	0	24
Other Pacific Islander	1	1	0	0	2
Partnership Outreach	0	0	21	5	26
Presentations to Groups in Language Other than English	4	2	2	0	8
Rural	2	3	1	1	7
Samoan	0	0	0	0	0
Socail Work Professionals	0	0	3	3	6
Some Other Race or Ethnicity	0	0	2	0	2
Vietnamese	0	0	1	0	1

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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	
Web Site Hits					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
Literature from Events					
General HICAP Brochure	2,633	3,130	1,130	1,705	8,598
"Taking Care of Tomorrow"	23	27	10	60	120
Other Publications (Created by or on Behalf of Local HICAP)	0	16	0	0	16
Other Literature					
Other Literature	0	0	75	145	220
Brochures from Quick Call	1	23	42	277	343

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	772	1,109	774	900	3,555
Total Finalized Intakes	298	481	438	314	1,531
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	128	195	216	105	644
Aging into Medicare Postacd - CDA HICAP	0	0	0	11	11
CDA HICAP	10	11	5	1	27
CHA	0	1	0	0	1
CMS/Medicare	21	18	31	19	89
Friend/Relative	25	31	18	22	96
InfoVan	0	0	0	0	0
Internet	7	4	5	3	19
Mailings	0	0	1	1	2
Media	3	16	5	3	27
Other	82	144	99	98	423
Presentations	6	25	11	3	45
Previous Contacts	0	0	23	33	56
State Website	0	0	0	2	2
Missing/Not Collected	16	37	24	13	90
Mode of Client Contact					
Quick Call Contacts	1,822	2,131	1,080	1,265	6,298
Contacts by Telephone	264	314	247	188	1,013
Contacts In Person at home	13	4	13	6	36
Contacts In Person at site	278	359	390	287	1,314
Contacts by E-Mail	230	511	167	114	1,022
Contacts by Mail/Fax	0	1	169	99	269
Total Number of Client Contacts:	2,607	3,320	2,066	1,959	9,952
Contact Status Types					
General info	0	2	659	472	1,133
Detailed Assistance	0	8	371	408	787
Problem Solving/Resolution	0	0	82	83	165
Total Counseling Time Spent by Counselor Type					
Program Manager	68.48	135.18	115.07	79.00	397.73
Volunteer	393.49	473.08	440.55	391.28	1,698.40
Paid	108.38	179.22	207.50	154.10	649.20
In-Kind	0.00	0.00	0.00	0.00	0.00
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	35	45	51	40	171
Race					
African American/Black	9	16	11	7	43

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	1	0	0	0	1
Caucasian/White	171	262	185	150	768
Native Hawaiian	1	0	0	0	1
Guamanian or Chamoro	0	0	0	0	0
Samoan	1	0	0	0	1
Asian Indian	1	2	15	4	22
Chinese	15	24	48	23	110
Filipino	20	34	63	41	158
Japanese	7	7	2	2	18
Hmong	0	0	0	0	0
Korean	3	7	0	0	10
Vietnamese	0	3	4	0	7
Other Pacific Islander	3	0	3	7	13
Other Asian	2	3	5	4	14
Two or More Race	1	1	0	3	5
Some Other race	38	54	72	46	210
Not Collected	25	68	30	27	150
Gender					
Female	157	281	266	186	890
Male	108	168	150	118	544
Not Collected	33	32	22	10	97
Monthly Income					
Less than 150% of FPL	76	107	210	108	501
Equal To/Greater than 150% of FPL	204	320	202	181	907
Not collected	18	54	26	25	123
Client Asset Limits					
Below LIS Asset limit	0	0	172	71	243
At or Above LIS Asset Limit	0	0	65	18	83
Not Collected	298	481	201	225	1,205

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

Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Total Clients that Checked Yes as Being					
Veteran	27	36	29	20	112
Limited English Proficient (LEP)	50	66	91	67	274
Dual Eligible	69	81	197	78	425
Medicare Status Due to Disability	62	83	49	52	246
Dual Eligible due to Mental Disability	0	0	5	6	11
Applying/Receiving Social Security/Medicare Disability	0	0	40	57	97
Age					
Under 60	35	49	26	33	143
60-64	15	19	22	42	98
65-74	138	197	210	141	686
75-84	52	97	83	35	267
85+	27	26	44	14	111
Not Collected	31	93	53	49	226
Marital Status					
Married	109	167	176	139	591
Never Married	38	49	35	29	151
Separated	3	13	7	6	29
Divorced	61	75	72	51	259
Widowed	41	86	100	54	281
Domestic Partner	3	1	3	2	9
Not Collected	43	90	45	33	211
Estimated Financial Saving					
Clients with Financial Savings	296	421	420	310	1,447
Estimated Dollars Saved	\$129,989.81	\$123,260.00	\$822,570.66	\$490,127.48	\$1,565,947.95

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 8 - Self Help for the Elderly

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

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	198	270	326	232	1,026
Benefit Comparisons/Explanation/Coverage Changes	186	248	330	249	1,013
Appeals/Grievances	0	7	5	4	16
Billings/Claims	17	16	18	10	61
Fraud/Abuse	0	1	0	1	2
Quality of Care	0	0	2	1	3
LTC/LTCI					
Enrollment/Eligibility Assistance	22	12	8	6	48
Billings/Claims	5	3	1	0	9
LTC Partnership	0	0	1	4	5
Appeal/Grievances	1	0	0	0	1
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	2	6	8
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	173	240	169	168	750
Benefit Explanation	154	219	167	171	711
Appeals/Grievances	2	3	0	1	6
Billings/Claims	7	2	4	3	16
Fraud/Abuse	1	0	0	0	1
Disenrollment/Coverage Changes	13	12	12	0	37
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	23	51	74
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	195	267	196	183	841
Benefit Explanation	174	245	194	186	799
Appeals/Grievances	1	2	4	5	12
Billings/Claims	11	5	7	5	28
Fraud/Abuse	0	0	0	1	1
Coverage Changes/Disenrollment	17	35	18	17	87
Plan Non Renewal	1	2	2	2	7
Plan Comparison	0	0	30	65	95
Enrollment/Enrollment Assistance	0	0	6	9	15
Quality of Care	0	0	3	0	3
Marketing/Sales Complaints or Issues	0	0	1	2	3
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	6	2	174	88	270
Medi-Cal Application Assistance	0	0	6	7	13

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)	44	44	230	149	467
MSP Application Assistance	0	0	139	59	198
Medi-Cal/QMB Claims	0	0	5	6	11
Fraud/Abuse	1	1	0	1	3
Other	161	187	198	65	611
Other					
Employer/Federal Health Benefits (FEHB)	68	94	75	77	314
Military Benefits	35	42	33	22	132
COBRA	10	15	10	18	53
Mental Health Topics	7	19	13	19	58
Fraud/Abuse	0	0	0	1	1
Other Health Insurance	0	0	6	12	18
Other	15	19	145	52	231
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	0	2	142	198	342
Eligibility/Screening	189	354	175	155	873
Plan Comparison	148	346	143	109	746
Enrollment/Anrollment Assistance	24	169	67	33	293
Billings/Claims	9	5	6	4	24
Coverage Changes	14	40	15	8	77
Re-enrollment	2	4	1	0	7
Disenrollment	1	0	1	2	4
TROOP	7	8	17	26	58
Other	31	59	15	9	114
LIS / Extra Help					
Eligibility / Screening	74	83	251	129	537
Benefit Explanation	0	0	29	41	70
Application Assistance	36	28	18	14	96
Claims/Billings	0	0	3	3	6
Appeals / Grievances	0	1	1	2	4
Other Prescription Drug CoveragePlans					
Union/employer	20	37	32	33	122
PPARx	0	1	0	1	2
Military Drug Benefit	0	0	8	8	16
Manufacturer Program	11	13	2	2	28
Other	13	4	10	11	38
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	1	2	3	3	9
Lag Time	1	0	0	0	1
Multiple Enrollment	1	0	0	1	2
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	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
Fraud/Abuse	0	0	0	1	1
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	1	1	4	0	6
Dosage problem	0	0	0	0	0
Data problems	0	2	2	0	4
Delay in medications	1	0	2	0	3
Incorrect Co-Pay/Can't Afford Co-Pay	0	2	1	0	3
Client reached donut hole	2	3	2	2	9
SSA Premium withheld	0	0	1	0	1
Appeals/Grievances	0	0	0	0	0
Quality of Care	0	0	0	2	2
Plan Non Renewal	0	0	1	0	1
HICAP Legal Services					
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 8 - Self Help for the Elderly

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

Complaints Filed

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Medicare Part D Complaints Filed					
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	1	0	0	0	1
SMP:	0	0	1	0	1
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	4	2	3	3	12
TOTAL MEDICARE PART D COMPLAINTS	5	2	4	3	14
All Other Complaints					
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
TOTAL ALL OTHER COMPLAINTS	0	0	0	0	0
800 Medicare Line Issues					
Total number of Calls with Issues	12	12	6	15	45
Total duration of calls	2.36	13.35	1.20	3.14	20.05