

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

Program: PSA 12 - Area 12 Agency on Aging 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	7	15	6	9	<b>37</b>
Estimated Number of Attendees	150	10,430	77	271	<b>10,928</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	1	3	3	16	<b>23</b>
Estimated Number of Attendees	50	435	261	1,084	<b>1,830</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	43	<b>43</b>
<b>Mobile InfoVan Events</b>					
Total Number of Events	1	3	1	0	<b>5</b>
Estimated Number of Attendees	150	110	25	0	<b>285</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	7	0	1	<b>8</b>
Estimated Number of Attendees	0	35	0	16	<b>51</b>
Estimated Number of Persons Received Any Enrollment Assistance	0	35	0	0	<b>35</b>
Enrollment Assistance with Medicare Programs(s)	0	35	0	0	<b>35</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	1	<b>1</b>
Estimated Number of Attendees	0	0	0	8,500	<b>8,500</b>
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	1	15	4	<b>20</b>
Estimated Number of Persons Reached	0	400	162,600	40,400	<b>203,400</b>

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<b>Other Print Activity (newspaper articles, fliers, pamphlets, etc.)</b>					
Total Number of Print Activities	1	2	19	52	<b>74</b>
Estimated Number of Targeted Persons Reached	370	2,300	207,000	639,000	<b>848,670</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	0	26	70	<b>96</b>
Total Hours for Length of Activities	0.00	0.00	31.50	73.40	<b>104.90</b>
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	5	15	<b>20</b>
Total Hours for Length of Activities	0.00	0.00	10.30	44.35	<b>54.65</b>
<b>Other Presenters</b>					
Total Presenters	0	0	1	8	<b>9</b>
Total Hours for Length of Activities	0.00	0.00	4.00	15.00	<b>19.00</b>
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	0	4	0	1	<b>12</b>
Employer Termination - COBRA	0	0	0	0	<b>0</b>
General HICAP Information	8	13	22	43	<b>86</b>
Grievances / Appeals - Plan Issues	2	3	0	0	<b>5</b>
Long-Term Care / Insurance	1	0	1	1	<b>3</b>
Low Income Subsidy (LIS) / Application Assistance	9	25	23	47	<b>104</b>
Medicare (Parts A & B)	5	6	12	10	<b>33</b>
Medicare Advantage (Part C)	6	5	3	4	<b>18</b>
Medicare Fraud / Abuse	4	6	8	25	<b>43</b>
Medicare Prescription Drug Coverage (Part D)	9	26	17	14	<b>66</b>
Medigap / Medicare Supplements	5	3	1	1	<b>10</b>
Non-Medicare Fraud/Abuse	1	1	1	0	<b>3</b>
Other Topics / Issues (Health Specific)	1	0	0	1	<b>2</b>

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### 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	1	6	13	22	<b>42</b>
QMB/SLMB/QI	5	11	15	40	<b>71</b>
Volunteer Recruitment	0	0	7	1	<b>8</b>
<b>Targeted Audience</b>					
African American	0	0	0	0	<b>0</b>
American Indian or Naitave Alaskan	0	0	0	0	<b>0</b>
Asian Indian	0	0	0	0	<b>0</b>
Caucasian	1	0	0	0	<b>1</b>
Chinese	0	0	0	0	<b>0</b>
Disabled	8	24	8	33	<b>73</b>
Dual Eligible Groups	0	0	7	8	<b>15</b>
Employer Related Groups	8	9	2	0	<b>19</b>
Family Member/Caregiver of Beneficiary	2	11	15	48	<b>76</b>
Filipino	0	0	0	0	<b>0</b>
Guamanian or Chamorro	0	0	0	0	<b>0</b>
Hispanic / Latino	1	1	0	0	<b>2</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	8	24	21	46	<b>99</b>
Medicare Beneficiaries	6	15	30	73	<b>124</b>
Medicare Pre-Enrollees	0	0	22	65	<b>87</b>
Mental Health	9	22	7	8	<b>46</b>
Mental Health Professionals	0	0	1	3	<b>4</b>
Native Hawaiian	0	0	0	0	<b>0</b>
Other	3	3	0	7	<b>13</b>
Other Asian	0	0	0	0	<b>0</b>
Other Pacific Islander	0	0	0	0	<b>0</b>
Partnership Outreach	0	0	0	2	<b>2</b>
Presentations to Groups in Language Other than English	0	3	0	0	<b>3</b>
Rural	8	28	42	61	<b>139</b>
Samoan	0	0	0	0	<b>0</b>
Socail Work Professionals	0	0	1	8	<b>9</b>
Some Other Race or Ethnicity	0	0	0	0	<b>0</b>
Vietnamese	0	0	0	0	<b>0</b>

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### 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	240	75	95,463	327	<b>96,105</b>
"Taking Care of Tomorrow"	0	0	0	1	<b>1</b>
Other Publications (Created by or on Behalf of Local HICAP)	150	75	263	564	<b>1,052</b>
<b>Other Literature</b>					
Other Literature	0	0	35	145	<b>180</b>
Brochures from Quick Call	3	9	5	3	<b>20</b>

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

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

## Client Contacts &amp; Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	303	997	301	351	<b>1,952</b>
Total Finalized Intakes	245	977	232	324	<b>1,778</b>
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	52	125	51	56	<b>284</b>
Aging into Medicare Postacd - CDA HICAP	0	0	0	2	<b>2</b>
CDA HICAP	12	68	5	7	<b>92</b>
CHA	0	1	0	0	<b>1</b>
CMS/Medicare	2	5	1	6	<b>14</b>
Friend/Relative	64	277	47	71	<b>459</b>
InfoVan	10	18	5	8	<b>41</b>
Internet	0	1	0	0	<b>1</b>
Mailings	0	0	0	0	<b>0</b>
Media	12	40	12	18	<b>82</b>
Other	62	315	44	32	<b>453</b>
Presentations	4	25	3	10	<b>42</b>
Previous Contacts	0	0	43	86	<b>129</b>
State Website	0	0	0	0	<b>0</b>
Missing/Not Collected	27	102	21	28	<b>178</b>
<b>Mode of Client Contact</b>					
Quick Call Contacts	595	2,353	1,132	1,086	<b>5,166</b>
Contacts by Telephone	140	86	89	125	<b>440</b>
Contacts In Person at home	3	11	2	3	<b>19</b>
Contacts In Person at site	234	961	219	296	<b>1,710</b>
Contacts by E-Mail	21	15	6	2	<b>44</b>
Contacts by Mail/Fax	0	0	6	9	<b>15</b>
<b>Total Number of Client Contacts:</b>	<b>993</b>	<b>3,426</b>	<b>1,454</b>	<b>1,521</b>	<b>7,394</b>
<b>Contact Status Types</b>					
General info	0	0	35	53	<b>88</b>
Detailed Assistance	0	1	187	334	<b>522</b>
Problem Solving/Resolution	0	0	40	39	<b>79</b>
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	32.33	140.02	19.38	7.50	<b>199.23</b>
Volunteer	124.52	461.40	108.54	198.00	<b>892.46</b>
Paid	134.38	320.13	114.21	142.44	<b>711.16</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)	4	16	4	10	<b>34</b>
<b>Race</b>					
African American/Black	0	2	0	0	<b>2</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	3	9	4	4	20
Caucasian/White	208	766	194	281	1,449
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	1	1
Asian Indian	0	0	0	0	0
Chinese	1	2	2	1	6
Filipino	0	1	1	0	2
Japanese	1	0	0	0	1
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	0	11	0	2	13
Other Pacific Islander	1	0	0	0	1
Other Asian	0	0	0	0	0
Two or More Race	4	1	0	2	7
Some Other race	1	8	0	4	13
Not Collected	26	177	31	29	263
<b>Gender</b>					
Female	157	593	148	192	1,090
Male	85	367	82	126	660
Not Collected	3	17	2	6	28
<b>Monthly Income</b>					
Less than 150% of FPL	62	158	73	83	376
Equal To/Greater than 150% of FPL	121	519	113	159	912
Not collected	62	300	46	82	490
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	19	31	50
At or Above LIS Asset Limit	0	0	7	18	25
Not Collected	245	977	206	275	1,703

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	31	86	28	39	<b>184</b>
Limited English Proficient (LEP)	1	7	2	3	<b>13</b>
Dual Eligible	50	147	55	60	<b>312</b>
Medicare Status Due to Disability	49	135	49	47	<b>280</b>
Dual Eligible due to Mental Disability	0	0	11	12	<b>23</b>
Applying/Receiving Social Security/Medicare Disability	0	0	39	44	<b>83</b>
<b>Age</b>					
Under 60	28	76	29	35	<b>168</b>
60-64	13	51	18	70	<b>152</b>
65-74	130	443	113	146	<b>832</b>
75-84	42	252	40	40	<b>374</b>
85+	12	102	23	20	<b>157</b>
Not Collected	20	53	9	13	<b>95</b>
<b>Marital Status</b>					
Married	117	465	103	143	<b>828</b>
Never Married	14	44	10	21	<b>89</b>
Separated	2	6	3	5	<b>16</b>
Divorced	36	115	41	50	<b>242</b>
Widowed	44	165	45	49	<b>303</b>
Domestic Partner	0	3	0	2	<b>5</b>
Not Collected	32	179	30	54	<b>295</b>
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	129	545	126	122	<b>922</b>
Estimated Dollars Saved	\$39,253.87	\$349,442.68	\$187,310.18	\$189,554.00	<b>\$765,560.73</b>

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## Program: PSA 12 - Area 12 Agency on Aging 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	222	735	203	308	1,468
Benefit Comparisons/Explanation/Coverage Changes	119	318	118	179	734
Appeals/Grievances	3	1	0	0	4
Billings/Claims	10	4	3	3	20
Fraud/Abuse	3	0	1	0	4
Quality of Care	0	0	0	0	0
<b>LTC/LTCI</b>					
Enrollment/Eligibility Assistance	9	6	6	13	34
Billings/Claims	3	2	1	0	6
LTC Partnership	0	0	2	1	3
Appeal/Grievances	0	0	0	1	1
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	3	3	6
<b>Medigap/Supplement/SELECT</b>					
Enrollment/Eligibility/Screening	131	249	104	196	680
Benefit Explanation	117	160	100	182	559
Appeals/Grievances	1	0	1	2	4
Billings/Claims	4	5	4	6	19
Fraud/Abuse	2	0	0	0	2
Disenrollment/Coverage Changes	13	9	3	6	31
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	11	58	69
Marketing/Sales Complaints/Issues	0	0	2	2	4
Plan Non Renewal	0	0	0	0	0
<b>Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)</b>					
Eligibility/Screening	77	148	74	127	426
Benefit Explanation	60	132	65	115	372
Appeals/Grievances	1	1	1	0	3
Billings/Claims	5	1	0	4	10
Fraud/Abuse	0	0	0	0	0
Coverage Changes/Disenrollment	2	6	7	4	19
Plan Non Renewal	0	0	0	0	0
Plan Comparison	0	0	9	22	31
Enrollment/Enrollment Assistance	0	0	8	13	21
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	1	1
<b>Medi-Cal</b>					
Medi-Cal Screening (SSI, Nursing Home)	4	3	14	26	47
Medi-Cal Application Assistance	0	0	0	6	6

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)	23	39	50	107	219
MSP Application Assistance	0	0	11	18	29
Medi-Cal/QMB Claims	0	0	1	0	1
Fraud/Abuse	1	2	0	0	3
Other	95	223	22	6	346
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	33	36	23	58	150
Military Benefits	13	19	8	24	64
COBRA	4	6	6	7	23
Mental Health Topics	8	37	20	13	78
Fraud/Abuse	0	0	0	1	1
Other Health Insurance	0	0	1	19	20
Other	10	7	9	33	59
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	1	156	256	413
Eligibility/Screening	168	908	161	270	1,507
Plan Comparison	132	886	116	181	1,315
Enrollment/Anrollment Assistance	76	528	72	113	789
Billings/Claims	9	0	4	9	22
Coverage Changes	7	16	5	11	39
Re-enrollment	0	13	3	4	20
Disenrollment	0	1	3	3	7
TROOP	0	0	1	5	6
Other	9	11	13	3	36
<b>LIS / Extra Help</b>					
Eligibility / Screening	64	125	77	139	405
Benefit Explanation	0	0	41	73	114
Application Assistance	24	32	23	28	107
Claims/Billings	0	0	1	4	5
Appeals / Grievances	1	1	2	0	4
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	19	21	14	45	99
PPARx	5	3	2	4	14
Military Drug Benefit	0	0	7	21	28
Manufacturer Program	5	6	0	0	11
Other	8	7	3	9	27
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	6	3	3	3	15
Lag Time	1	0	2	1	4
Multiple Enrollment	0	1	0	1	2
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

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
Marketing Fraud/Abuse	1	0	0	0	1
Agent fraud/abuse	1	0	0	0	1
Formulary problems/changes	5	2	5	5	17
Dosage problem	0	0	0	1	1
Data problems	3	0	1	1	5
Delay in medications	0	2	2	0	4
Incorrect Co-Pay/Can't Afford Co-Pay	2	0	0	0	2
Client reached donut hole	7	3	0	2	12
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	1	3	4
Quality of Care	0	0	0	2	2
Plan Non Renewal	0	0	1	0	1
<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

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### 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	<b>0</b>
CMS:	0	1	1	0	<b>2</b>
Part D Plan:	1	2	2	0	<b>5</b>
SMP:	1	0	0	0	<b>1</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	1	0	0	<b>1</b>
Other:	4	1	4	7	<b>16</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>6</b>	<b>5</b>	<b>7</b>	<b>7</b>	<b>25</b>
<b>All Other Complaints</b>					
APS :	0	0	0	1	<b>1</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	1	0	0	0	<b>1</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	4	20	2	4	<b>30</b>
Total duration of calls	1.18	7.47	0.19	0.00	<b>8.84</b>