

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

Program: PSA 29 - HICAP Services of Northern California

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	2	11
Estimated Number of Attendees	183	105	90	57	435
Estimated Number of Persons Provided Enrollment Assistance	0	0	8	0	8
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	1	0	0	0	1
Estimated Number of Attendees	5,000	0	0	0	5,000
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Mobile InfoVan Events</b>					
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
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	1	0	0	1
Estimated Number of Attendees	0	16	0	0	16
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	0
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	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	0	0	0	0	<b>0</b>
Estimated Number of Targeted Persons Reached	0	0	0	0	<b>0</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	3	2	2	<b>7</b>
Total Hours for Length of Activities	0.00	20.00	7.00	0.00	<b>27.00</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	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>Other Presenters</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>Area of Focus</b>					
Dual Eligible with Mental Illness	0	0	1	0	<b>1</b>
Employer Termination - COBRA	0	0	0	0	<b>0</b>
General HICAP Information	6	3	2	2	<b>13</b>
Grievances / Appeals - Plan Issues	0	0	0	0	<b>0</b>
Long-Term Care / Insurance	3	0	0	0	<b>3</b>
Low Income Subsidy (LIS) / Application Assistance	6	3	2	2	<b>13</b>
Medicare (Parts A & B)	6	3	2	1	<b>12</b>
Medicare Advantage (Part C)	6	3	2	1	<b>12</b>
Medicare Fraud / Abuse	6	3	2	0	<b>11</b>
Medicare Prescription Drug Coverage (Part D)	6	3	1	1	<b>11</b>
Medigap / Medicare Supplements	6	3	2	0	<b>11</b>
Non-Medicare Fraud/Abuse	0	0	0	0	<b>0</b>
Other Topics / Issues (Health Specific)	0	0	0	0	<b>0</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	0	2	0	0	2
QMB/SLMB/QI	0	2	1	1	4
Volunteer Recruitment	0	0	0	0	0
<b>Targeted Audience</b>					
African American	6	3	1	0	10
American Indian or Naitave Alaskan	1	1	0	0	2
Asian Indian	0	0	0	0	0
Caucasian	6	3	2	0	11
Chinese	0	0	1	0	1
Disabled	6	2	2	0	10
Dual Eligible Groups	0	0	1	1	2
Employer Related Groups	5	0	0	1	6
Family Member/Caregiver of Beneficiary	3	2	1	0	6
Filipino	0	0	0	0	0
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	6	3	1	0	10
Hmong	0	0	0	0	0
Japanese	0	0	0	0	0
Korean	0	0	0	0	0
Low Income	2	3	2	1	8
Medicare Beneficiaries	6	3	2	1	12
Medicare Pre-Enrollees	0	0	1	1	2
Mental Health	0	0	0	0	0
Mental Health Professionals	0	0	0	0	0
Native Hawaiian	0	0	0	0	0
Other	0	0	0	0	0
Other Asian	6	2	0	0	8
Other Pacific Islander	0	0	0	0	0
Partnership Outreach	0	0	0	0	0
Presentations to Groups in Language Other than English	1	0	0	0	1
Rural	3	3	0	1	7
Samoan	0	0	0	0	0
Socail Work Professionals	0	0	0	1	1
Some Other Race or Ethnicity	0	0	0	0	0
Vietnamese	0	0	0	0	0

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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	109	119	124	120	<b>472</b>
<b>Literature from Events</b>					
General HICAP Brochure	355	140	90	0	<b>585</b>
"Taking Care of Tomorrow"	0	0	0	0	<b>0</b>
Other Publications (Created by or on Behalf of Local HICAP)	35	0	90	0	<b>125</b>
<b>Other Literature</b>					
Other Literature	0	0	0	0	<b>0</b>
Brochures from Quick Call	0	0	0	0	<b>0</b>

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

## Program: PSA 29 - HICAP Services of Northern California

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)	132	152	96	77	<b>457</b>
Total Finalized Intakes	136	150	99	66	<b>451</b>
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	54	47	36	32	<b>169</b>
Aging into Medicare Postacd - CDA HICAP	0	0	0	0	<b>0</b>
CDA HICAP	3	6	2	0	<b>11</b>
CHA	0	0	0	0	<b>0</b>
CMS/Medicare	4	5	4	1	<b>14</b>
Friend/Relative	10	18	9	8	<b>45</b>
InfoVan	0	0	0	0	<b>0</b>
Internet	2	1	0	0	<b>3</b>
Mailings	0	0	1	1	<b>2</b>
Media	1	5	3	2	<b>11</b>
Other	38	56	13	13	<b>120</b>
Presentations	0	2	2	0	<b>4</b>
Previous Contacts	0	0	13	5	<b>18</b>
State Website	0	0	0	0	<b>0</b>
Missing/Not Collected	24	10	16	4	<b>54</b>
<b>Mode of Client Contact</b>					
Quick Call Contacts	0	1	0	10	<b>11</b>
Contacts by Telephone	51	73	45	16	<b>185</b>
Contacts In Person at home	1	1	0	0	<b>2</b>
Contacts In Person at site	129	145	91	66	<b>431</b>
Contacts by E-Mail	93	140	46	1	<b>280</b>
Contacts by Mail/Fax	0	1	10	2	<b>13</b>
<b>Total Number of Client Contacts:</b>	<b>274</b>	<b>361</b>	<b>192</b>	<b>95</b>	<b>922</b>
<b>Contact Status Types</b>					
General info	0	1	28	38	<b>67</b>
Detailed Assistance	0	0	71	64	<b>135</b>
Problem Solving/Resolution	0	1	22	15	<b>38</b>
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	0.00	0.00	0.00	0.00	<b>0.00</b>
Volunteer	376.37	89.22	71.11	38.47	<b>575.17</b>
Paid	59.11	110.50	60.38	35.25	<b>265.24</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	3	8	2	<b>17</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	7	1	0	3	11
Caucasian/White	107	135	82	55	379
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	1	1	0	2	4
Filipino	0	0	0	0	0
Japanese	0	0	0	0	0
Hmong	0	0	0	0	0
Korean	0	0	0	1	1
Vietnamese	0	0	0	0	0
Other Pacific Islander	0	0	0	0	0
Other Asian	1	0	1	1	3
Two or More Race	0	1	0	0	1
Some Other race	3	1	0	1	5
Not Collected	16	11	16	3	46
<b>Gender</b>					
Female	71	86	48	32	237
Male	52	44	30	30	156
Not Collected	13	20	21	4	58
<b>Monthly Income</b>					
Less than 150% of FPL	34	34	27	16	111
Equal To/Greater than 150% of FPL	91	105	68	50	314
Not collected	11	11	4	0	26
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	2	1	3
At or Above LIS Asset Limit	0	0	0	0	0
Not Collected	136	150	97	65	448

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	23	16	13	12	<b>64</b>
Limited English Proficient (LEP)	0	0	0	2	<b>2</b>
Dual Eligible	25	18	21	9	<b>73</b>
Medicare Status Due to Disability	27	25	17	11	<b>80</b>
Dual Eligible due to Mental Disability	0	0	1	2	<b>3</b>
Applying/Receiving Social Security/Medicare Disability	0	0	16	14	<b>30</b>
<b>Age</b>					
Under 60	23	20	8	8	<b>59</b>
60-64	13	10	15	17	<b>55</b>
65-74	61	76	53	27	<b>217</b>
75-84	24	31	16	9	<b>80</b>
85+	12	11	4	5	<b>32</b>
Not Collected	3	2	3	0	<b>8</b>
<b>Marital Status</b>					
Married	56	65	38	26	<b>185</b>
Never Married	3	8	8	3	<b>22</b>
Separated	4	1	1	0	<b>6</b>
Divorced	33	36	23	19	<b>111</b>
Widowed	25	29	15	12	<b>81</b>
Domestic Partner	1	2	0	2	<b>5</b>
Not Collected	14	9	14	4	<b>41</b>
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	3	5	8	0	<b>16</b>
Estimated Dollars Saved	\$4,077.00	\$966.00	\$8,787.40	\$0.00	<b>\$13,830.40</b>

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

	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
<b>Medicare Parts A&amp;B (Original Medicare)</b>					
Enrollment/Eligibility/Screening	72	101	63	45	281
Benefit Comparisons/Explanation/Coverage Changes	73	86	60	50	269
Appeals/Grievances	3	2	0	0	5
Billings/Claims	8	3	5	0	16
Fraud/Abuse	0	0	0	0	0
Quality of Care	0	0	1	0	1
<b>LTC/LTCI</b>					
Enrollment/Eligibility Assistance	5	2	1	0	8
Billings/Claims	1	0	0	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	64	86	43	31	224
Benefit Explanation	54	76	44	45	219
Appeals/Grievances	0	1	0	0	1
Billings/Claims	3	2	1	3	9
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	4	5	2	1	12
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	15	31	46
Marketing/Sales Complaints/Issues	0	0	0	3	3
Plan Non Renewal	0	0	0	0	0
<b>Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)</b>					
Eligibility/Screening	61	81	45	34	221
Benefit Explanation	55	78	46	47	226
Appeals/Grievances	0	0	2	0	2
Billings/Claims	1	0	3	2	6
Fraud/Abuse	0	0	0	0	0
Coverage Changes/Disenrollment	2	2	3	1	8
Plan Non Renewal	0	0	0	0	0
Plan Comparison	0	0	17	31	48
Enrollment/Enrollment Assistance	0	0	1	2	3
Quality of Care	0	0	1	0	1
Marketing/Sales Complaints or Issues	0	0	0	3	3
<b>Medi-Cal</b>					
Medi-Cal Screening (SSI, Nursing Home)	2	1	3	0	6
Medi-Cal Application Assistance	0	0	0	3	3

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

### Topics/Needs Discussed

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
MSP Screening (QMB, SLMB, Q-1)	7	4	9	9	29
MSP Application Assistance	0	0	2	1	3
Medi-Cal/QMB Claims	0	0	1	1	2
Fraud/Abuse	0	0	0	0	0
Other	20	26	7	1	54
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	11	14	15	15	55
Military Benefits	6	5	7	5	23
COBRA	3	3	1	4	11
Mental Health Topics	2	8	1	1	12
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	0	0	1	1	2
Other	2	3	2	1	8
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	0	42	50	92
Eligibility/Screening	92	121	54	37	304
Plan Comparison	53	83	43	13	192
Enrollment/Anrollment Assistance	12	17	6	4	39
Billings/Claims	3	3	4	5	15
Coverage Changes	5	3	4	6	18
Re-enrollment	2	1	1	0	4
Disenrollment	0	0	0	0	0
TROOP	1	0	0	0	1
Other	3	0	0	2	5
<b>LIS / Extra Help</b>					
Eligibility / Screening	10	23	22	17	72
Benefit Explanation	0	0	14	8	22
Application Assistance	2	2	3	1	8
Claims/Billings	0	0	1	4	5
Appeals / Grievances	0	1	0	0	1
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	3	3	6	4	16
PPARx	1	3	4	2	10
Military Drug Benefit	0	0	3	3	6
Manufacturer Program	2	0	0	0	2
Other	2	3	0	0	5
<b>Part D Plan Problems (Non-Compliance Services Unmet)</b>					
Eligibility	0	1	0	0	1
Lag Time	1	0	0	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	1	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	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	1	0	2	0	3
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	0	0	0	1	1
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	0	0	0
Client reached donut hole	1	0	0	0	1
SSA Premium withheld	1	0	0	0	1
Appeals/Grievances	0	0	0	0	0
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	1	1
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	2	5	3	0	10
Cases Opened	2	1	3	1	7
Cases Closed	3	7	5	1	16
Favorable Closed Case Results	1	0	3	0	4
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	3	6	8	3	20
HICAP Legal Clients that Saved	1	0	1	0	2
Estimated Financial Savings	\$408.00	\$0.00	\$256.00	\$0.00	<b>\$664.00</b>

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

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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	0	0	0	<b>0</b>
Part D Plan:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	0	0	<b>0</b>
Other:	1	0	0	1	<b>2</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</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:	0	0	0	0	<b>0</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	9	14	6	0	<b>29</b>
Total duration of calls	1.00	5.35	0.59	0.00	<b>6.94</b>