

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt and Del Norte**

Optional Success  
Story(ies)/Case Summary(ies)

None Provided

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Provided

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Shasta, Siskiyou, Lassen, Modoc and Trinity**

Optional Success  
Story(ies)/Case Summary(ies)

none stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

none stated

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 4**

**California Legal Services (Title III B)**  
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Fiscal Year: 2011-2012

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Provider: Legal Services of Northern California

Counties: Yolo

Optional Success  
Story(ies)/Case Summary(ies)

The client, a 76 year old woman with 11 impairments, had her in home supportive services hours cut entirely, leaving her in jeopardy of being placed in long term care. The doctor who filled out her evaluation form, mistakenly marked that she had no chronic disabling conditions after misreading the form. LSNC requested a hearing and introduced testimony and corroborating medical evidence that the client is at risk of an out of home placement without IHSS hours. The ALJ agreed and awarded the client the hours she requires to remain at home. (ALJ probably stands for Administrative Law Judge)

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff held office hours at the following locations: Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the 1st Thursday of the month; the West Sacramento Senior Center on the 2nd Thursday of the month and the former West Sacramento Senior Center on the 4th Thursday of the month; and the Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month. In addition, LSNC participates in monthly meetings of the Yolo County Health Aging Collaboration with other Yolo County senior providers, including the Food Bank, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Employment and Social Services, Veteran's Services, and representatives from the three Senior Centers.

Legal Representation: 14.50  
Legal Advice/Assistance: 80.90  
Community Education: 29.0  
Special Outreach: 2.0  
Total Hours: 126.4

Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

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Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

Optional Success  
 Story(ies)/Case Summary(ies)

February 2012  
 LSNC/ Mother Lode Regional Office volunteer attorney Cheryl Carl was awarded Pro Bono Attorney of the Year by The Placer County Bar Association. Ms. Carl has staffed our Senior Legal Clinics for over ten years and provides her expertise in elder law cases for our staff advocates.

Optional Information on  
 Collaboration with Other  
 Advocacy Groups

January 2012  
 None.

February 2012  
 LSNC Mother Lode Regional is collaborating with the Community Agency Elder Multidisciplinary Elder Team (CAMET) in drafting a "1Card" resource for first responders who assist elderly victims of domestic violence. The card will have the names of agencies who provide services to victims of DV such as counseling, restraining orders, revoking powers of attorney, name changes and other needs of victims of DV.

LSNC /MLRO volunteer attorneys requested and were granted access to legal training webinars provided by California Advocates for Nursing Home Reform.[CANHR]. Specific CANHR online legal service trainings were previously only available without charge to LSNC staff advocates. CANHR's executive board agreed to provide access to specific online legal training webinars for MLRO volunteers only due to the need for more pro bono services for seniors in the MLRO service area.

Legal Aid Association of California (LAAC) also allows access to free online training to all LSNC volunteer attorneys

March 2012  
 LSNC is currently working with Placer County Sheriff's Office and a community Neighborhood Watch program regarding ongoing vandalism issues in a Senior Mobile Home Park.  
 Monthly Service Units Report

Month:

Title of Service Unit Unit Number of Units  
 a. Legal Assistance 1 hour 664  
 b. Legal Representation 1 hour 117  
 c. Legal Education & Advocacy 1 hour 41  
 d. Total Legal Services (a+b+c) 1 hour 822

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Legal Services by County
PlacerNevadaSierraTotal
Assistance40225111664
Representation64530117
Community Education/Advocacy2417041
Totals4903215822

**Provider: Yuba Sutter Legal Center**

**Counties: Sutter and Yuba**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 5**

**California Legal Services (Title III B)**  
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Fiscal Year: 2011-2012

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Provider: Legal Aid of the North Bay

Counties: Marin

Optional Success  
Story(ies)/Case Summary(ies)

Our client, a 68 year old Latino male from Greenbrae, was twice exposed to foreclosure fraud scams. In the first case, he paid \$1000 for assistance in modifying his loan and received nothing in return. In the second case, he came to Legal Aid for help. After his house was already foreclosed upon, a collection agency began pursuing a line of credit. LAM advised him not to make payments and contest the debt. LAM attorneys wrote a letter to the agency and the client hasn't heard anything from them since!

Richard White v. Richard Hyslop, MD & GE Credit- LAM investigated possible fraud by Dr. Jonathan Hyslop of Corte Madera and GE Credit. Mr. White, an 80 year old senior, was asked to sign a credit application with GE Credit in order to receive medical services by Dr. Hyslop, a chiropractor. Mr. White stopped treatment shortly after starting because he felt that treatment was making him feel worse. However, he continued to receive payment requests from GE Credit. We believe Dr. Hyslop was paid up front for services he did not provide. In November 2011, LAM sent the doctor and GE Credit a demand letter. We also sent various follow up letters to GE Credit to cancel Mr. White's credit. We also sent a complaint to the Board of Chiropractic Examiners regarding Dr. Hyslop's practice. On January 18, 2012, GE Credit cancelled Mr. White's credit and informed him that his balance was 0.

On Feb. 3, 2012 we received a response from the Board of Chiropractic Examiners informing us that the Board found evidence to support a violation of their regulations.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 6

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success  
Story(ies)/Case Summary(ies)

January Client: A Spanish speaking senior had a divorce and he was trying to have the SSA accept that though still living in the same building with his ex-wife they were divorced with totally separate incomes. The SSA was reluctant to admit this fact for a long time and actually demanded to be reimbursed for an overpayment in the amount of \$10,000. With our help, the overpayment was waived and the administration finally had the client registered officially at SSA as divorced, so they can begin to get higher benefits for single household persons.

February Client: A senior resident came to our La Raza Senior Law Clinic asking for legal help after her applications for public benefits have been consistently denied. We met with the officials of the SSA and completed a SSDI application. We learned that in fact, she is eligible for SSDI through her husband's work credits. We managed to file a wedding certificate from Mexico, so she can begin to receive SSDI benefits. The client now receives SSDI and she is eligible to get more SSA benefits when she turns 65 years of age.

March Client: A Spanish speaking extremely low income senior resident came to our La Raza Senior Law Clinic with a debt for \$2,058 that he could not pay because he only receives a small check from the Social Security Administration. The debt collection agency was very aggressive, writing him multiple letters a month and seeking to put a lien on his bank account. We helped the client write a Cease and Desist letter to the collection agency explaining that his social security benefits are exempt from collection actions of any type, therefore his check could not be garnished. Finally, we received a letter from the collection agency stating its compliance with the applicable law and agreeing to cease all collection efforts and close the account.

Optional Information on  
Collaboration with Other  
Advocacy Groups

The last quarter was marked by a decreased number of seniors asking for help due to seasonal reasons but we expect the normal attendance to be back during the Spring season.

We keep participating actively at the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, we continue to collaborate with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it. We are providing the Senior Profile article for the next issue to be published in late May 2012.

Finally, we still collaborate actively with the Legal Aid Association of California, Senior Law Chapter in both the Steering Committee and the Languages Access Committee. Our goal is to provide our input in sensitive and crucial legal issues of interest for seniors.

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**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Client is an 84 year old Japanese American who speaks limited English. She failed to pay one month's rent and was served with an eviction. When she did not respond, a default judgment was entered. We were contacted less than a week prior to the Sheriff's eviction. Our housing attorney filed a stay, filed for an order shortening time, filed a motion to set aside the eviction, all of which were granted and then filed an answer. Landlord agreed to let the client stay and gave her time to pay the back rent.

Optional Information on  
Collaboration with Other  
Advocacy Groups

On February 13th & 14th our Executive Director attended a statewide retreat for senior legal service providers, convened by the Legal Aid Association of California at the State Bar of California. The agenda included a series of continuing legal education courses (serving immigrant communities, serving the LGBT community, health care access) and discussions of topics of mutual concern (targeting, coordination, coping with limited resources).

**Provider: Asian Pacific Islander Legal Outreach**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Story #1: Mr. Client is a 91-year-old Russian immigrant and monolingual Russian speaker who had several health ailments which necessitate use of a wheelchair. His partner of 30 years recently passed away and although he wished to continue living in her subsidized housing unit (where he had lived with her for the duration of their relationship), the Housing Authority argued that he was not eligible for the unit. We assisted Mr. Client by making a reasonable accommodation request and argued that it would be an undue burden to force him to move. After several letters and phone calls, we were able to convince the Housing Authority to allow Mr. Client to remain in his current housing unit.

Story #2 Ms. Ramos is a 63-year-old Mexican senior citizen who was trafficked to the U.S. and forced to do domestic work for nearly a decade. In addition to being paid nearly nothing for her work, Ms. Ramos was severely injured several times on the job and her trafficker refused her medical care. Ms. Ramos was referred to our office by the Mexican consulate and we determined that she had been a victim of human trafficking. We connected Ms. Ramos to a women's shelter and assisted her secure social service assistance by working closely with her shelter caseworkers. API Legal Outreach also assisted Ms. Ramos with an immigration application for a T-Visa which was recently granted! With a T-Visa, Ms. Ramos now has legal status in the U.S. and is eligible to receive public benefits that will assist her with food and housing.

Optional Information on  
Collaboration with Other  
Advocacy Groups

See previous reports.

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**Provider: Asian Law Caucus**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

We were able to avert an imminent eviction of a 96 yr. old tenant in a foreclosed home. The tenant's family contacted our office when they had received the sheriff's one-week eviction notice, which was a couple of days before the long Thanksgiving weekend. The new owner, an investment company, did not know the house was occupied, and the tenant, who only understood Chinese, did not understand any of the general notices sent to the house regarding the lawsuit. We met with the deputy sheriffs at the house on the day of the eviction, and convinced them to postpone it, so that we could try to defend the tenant in court. We were given a week, during which time we were able to stay the execution of the order, add the tenant as a defendant, and file a motion to vacate the judgment so that the tenant could have his day in court. The tenant's family only wanted more time to place him in a nursing home, because his health had been deteriorating. I was able to negotiate a two-month window to have the tenant move out by the end of February and have the case dismissed. We finalized the stipulation, but before the owner was able to execute it, the tenant died on Feb. 5. Ultimately, the family, namely the children of the tenant, were relieved that their father was not evicted and did not have to be forcibly uprooted from his home during his final days.

In another case, we assisted a physically and mentally disabled senior citizen who was detained and placed in removal by immigration for a nearly 40 year old conviction. Immigration initially detained him without bond but released him after several days due to his serious medical issues. We moved the court to terminate removal proceedings because the age of his conviction in fact did not make him deportable or subject to detention.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 7**

**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa County**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 8**

**California Legal Services (Title III B)**  
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Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success  
Story(ies)/Case Summary(ies)

Mr. & Mrs. D live on their modest Social Security benefits and CalFresh (food stamps) benefits. The couple came to us because the County Human Services Agency planned to reduce their CalFresh benefits from \$367/month to about \$200 based on an anticipated Cost of Living increase to their Social Security benefits. However, Mrs. D also had significant out of pocket medical expenses which, under CalFresh rules, should have been deducted from their countable income. The County had not done that. We helped Mr. & Mrs. D request an administrative hearing and negotiated with the County appeals office on their behalf. The County agreed to deduct the couple's medical expenses, which increased their CalFresh benefits back to the original amount of \$367/month.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have been working with Aging and Adult Services staff to help an elderly, disabled client to verify his eligibility for Medi-Cal after he was denied for not verifying life insurance proceeds.

We have also been working with Second Harvest Food Bank, Coastside Hope, Fair Oaks Community Center, and Nuestra Casa to dispel myths and encourage elderly immigrants to apply for CalFresh benefits.

Senior Advocates attorney Amanda Barden is now the co-chair of the Legal Aid Association of California (LAAC) Senior Legal Service Providers workgroup. She continues to collaborate with the Ombudsman Program, APS, AAA/AAS (Commission on Aging, Legislative Advocacy and Adult Abuse Prevention Collaborative), CANHR, OneJustice, and multiple senior centers and senior housing complexes for presentations and information fairs.

PSA: 9

**California Legal Services (Title III B)**  
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Provider: Legal Assistance for Seniors

Counties: Alameda

Optional Success  
Story(ies)/Case Summary(ies)

Ms. G works as a security guard at a local grammar school and she has been taking care of two sisters that attend the school. She took the girls into her home at the request of the girls' mother, a street drug user who had recently lost the apartment where she and the girls lived. The girls have different fathers and neither father has ever been involved in their lives, so when their mother asked Ms. G to take care of the girls, Ms. G generously took them into her small apartment. Ms. G soon learned that she could not apply for CalWorks or MediCal benefits for the children or apply for public housing adequate for the three of them because she did not have legal guardianship of the girls, so she decided to petition for guardianship of both of them. Ms. G made efforts to give notice to their fathers but was unable to find them.

At the initial court hearing, Ms. G discovered that the probate examiner had noted that the girls may have Native American ancestry, which meant that she would need to fill out the ten-page Notice of Child Custody Proceeding for Indian Child form for each minor and send them by certified mail to the U.S. Dept. of the Interior, the CA Bureau of Indian Affairs, the tribe or tribes and the parents of the children, then file it with the court. She would also need to write a declaration with proof that all had received it and note their response or explain why it couldn't be accomplished. In addition, her case would be continued for two months. She was very upset by this ruling because she had been using her limited funds to financially support the girls and she was concerned about securing health insurance coverage for them.

Ms. G. then came to LAS seeking assistance in filing for guardianship of two girls in her care. LAS staff helped Ms. G. prepare a Petition for Appointment of Temporary Guardian with all related documents and persuaded the clerk to calendar a hearing for the temporary guardianship on that very same day. When the case was called, the judge granted temporary guardianship of both girls to Ms. G. LAS staff then assisted Ms. G in filing the remaining documents required by the court and at the next hearing she was appointed permanent guardian of the children.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Assistance for Seniors (LAS) has been awarded a contract by Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS has also been awarded contracts by the State Bar of California and the cities of Fremont, Hayward, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

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PSA: 10

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Collaboration With Senior Centers and Other Sites to Deliver Services**

For the 3rd Quarter of 2011-12, SALA provided on-site legal service intake appointments at 23 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees (San Jose), Eastside Senior Center (San Jose), Mayfair Community Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

**Participation in Collaborative Activities with Other Attorneys**

SALA attorneys participated in meetings of the Public Benefits Task Force in February 2012 and the Elder Abuse Task Force in March 2012. Three of SALA's attorneys also attended a meeting on elder abuse prevention convened by an attorney of the District Attorney's office in March 2012.

PSA: 11

**California Legal Services (Title III B)**  
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Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success  
Story(ies)/Case Summary(ies)

January – This month we had a client who came into see staff very upset because Social Security was requesting she go into the office to apply for retirement benefits. The client currently receives SSI and seems to be content with what she receives. Unaware of how the system works, and expecting the worse, the client was stressed. She was concerned her current check amount may be decreased. However, due to our good working relationship with Social Security, staff was able to talk to a representative and received an explanation. Staff informed the client that as a rule, an individual on SSI must apply for other benefits she/he is eligible for. In this case, client will be 65 in March and is eligible for retirement benefits. We also informed her that her income will stay the same or increase and will not be reduced because of this action. Client was grateful. \*\*\*\*\*  
This month, we assisted a senior in addressing the abusive situation she lives in. Client has an adult child living with her and, more often than not, verbally and emotionally abuses the client. Despite the abuse, client loves son and does not want to see him end up on the street. We informed the client of all options she has to have the son removed from the home. We emphasized she is not forced to do anything, but, if she wants to be safe and live in peace, she needs to consider taking action. Client is appreciative and has stopped by the office several times for follow up.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 12

Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

Optional Success  
Story(ies)/Case Summary(ies)

None

Optional Information on  
Collaboration with Other  
Advocacy Groups

None

PSA: 13

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**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz County & San Benito**

Optional Success  
Story(ies)/Case Summary(ies)

To be provided with the Fourth Quarter Report.

Optional Information on  
Collaboration with Other  
Advocacy Groups

To be provided with the Fourth Quarter Report.  
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**PSA: 14**

**Provider: Central California Legal Services**

**Counties: Fresno, Madera**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 15**

**Provider: Central California Legal Services, Inc.**

**Counties: Kings**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

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**Provider: Sarah Shena, Tulare Co. Senior Legal Service Counties: Tulare**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

In June 2011 at a regional Senior Legal Services Providers' meeting I learned of a OneJustice program that brings law students to rural areas. As a result, we with OneJustice to train several law students on issues facing rural elders, and bring the students to Tulare County to host legal clinics in two of our most remote communities. Our attorney also partnered with a local nonprofit, CSET, which provided space for one of the clinics. The clinics were greatly appreciated by those communities and the individuals we served. Further, the marketing/outreach done before those clinics (print media, radio, television) spread word of our program much wider than we are usually able to accomplish. That marketing, and the partnership with CSET, lead to CSET and a local health provider with many rural clinics to request our fliers for distribution to their clients and their email networks – further broadcasting the existence of our office to targeted elders and referral sources.

In addition, collaboration with United Way of Tulare County, HICAP, Sequoia Community Mediation Center, Self-Help Resource Center, AAA Information & Assistance staff and others continues as previously reported.

**PSA: 16**

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Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success  
Story(ies)/Case Summary(ies)

3rd Quarter Case Summaries:

CASE #1: We assisted a 93 year old client with serious health issues and living on a very limited income. The client was distraught over a collection agency's continual calls. We offered educational information to the client on how to dispute a debt which may be in error and how to stop the unwanted and harassing calls. We provided a "cease letter" drafted for the client's situation that requires the debt collection agency to stop calling the client.

CASE #2: An elder client contacted us for legal advice regarding a contract for in-home financial assistance from a company located in Missouri. The contract allowed the company to provide a loan to the client for in-home care costs until the VA approved an application for Aid and Attendance benefits. The client's spouse had been cared for at home by a local home health agency ever since the client was unable to care for her spouse due to her own deteriorating health. The client's spouse had already filed an application for VA Aid and Attendance benefits. CILS advocates reviewed the facts of the case including the contract. It was determined there were several inconsistencies. For example, the application stated in error that the client's spouse was bedridden and unable to walk. With this error on the VA application, the contract for assistance would have bound the client to high costs for the next 6 months to which the client stated they did not need that level of care. We provided the client with counsel and advice on the application for VA Aid and Attendance benefits and additional options. We recommended the client do not sign the contract for assistance as it was not in the client's best interest and to work closely with the local Veteran Services Officer.

CASE #3: An 80 year old widow contacted us regarding a tree trimming contract problem. The client had not received a written estimate from the licensed contractor prior to the work being performed. Once the service was performed the client felt the contractor's work was unsatisfactory. The client requested that the large mature trees be trimmed and the contractor offered a verbal estimate to do the work for \$800. After one days work the client looked at the trees and saw the job was incomplete as the top limbs still needed to be trimmed. The contractor returned and worked for 3 hours and then demanded payment in full. The client stated the work was not satisfactory and until it was wouldn't pay the contractor. The contractor then stated "you can pay me half and I am out of here." The client paid the contractor \$500 and the contractor left. Two days later the client received a telephone call stating that if she didn't pay the full amount of \$800 that the contractor would file a lien against her for the balance. Upon review of the facts by CILS advocates we counseled the client and recommended the client seek a second written estimate from a licensed contractor for the remainder of the work which was not completed. Further, the advocate recommended that the client take pictures right away to preserve the substantiation of the incomplete work and recommended to ask if the 2nd Contractor would state in his written estimate that the former work was incomplete and was not good workmanship. The client was instructed not to return the call to the 1st contractor. We provided information to the client on "how to hire a contractor." The client was very relieved and grateful for the services provided.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

The Inyo Mono Senior Legal Program coordinates services with the Inyo and Mono Department of Health Care Services, Inyo Mono Area Agency Advisory Council membership, Inyo and Mono Senior Service Centers, California Advocates for Nursing Home Reform, National Senior Citizens law Center, Western Center on Law and Poverty, Ombudsman Program for Inyo and Mono counties, and HICAP.

**PSA: 17**

**Provider: Central Coast Commission For Senior Citizens**    **Counties: Santa Barbara County/San Luis Obispo**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 18**

**Provider: Grey Law of Ventura County, Inc.**    **Counties: Ventura**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

Collaboration with Executive office of the Superior Court to provide a series of trainings for seniors and caregivers to include discussion of risks and benefits of available legal forms and assistance filling in the forms, including Powers of Attorney and Advanced Health Care Directives. The first trial run will be April 13th and we will target at least monthly thereafter as schedules allow.

**PSA: 19**

**Provider: Bet Tzedek Legal Services**    **Counties: Los Angeles**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 20**

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Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

Optional Success  
Story(ies)/Case Summary(ies)

Case Story #1:

Client received a check made out to his deceased wife. The bank would not cash it or allow it to be put into his account. Client needed an affidavit 13100 referring to Probate Code, Section 13100 stating under oath that this was a check payable to his wife and it was under a certain amount based on statute and therefore the bank could either cash the check or place it into his account.

Case Story #2:

Client was a 65 year old senior who had an old money judgment entered against her in 2000 which was renewed after 10 years. The creditor put a lien on her home and filed an application to sell her home to pay for the debt which was originally less than \$2,000. ICLS opposed it in court. With the time gained from opposing the application the client was able to get a line of credit to pay off the debt so that the creditor would not be able to sell her home and the lien would be removed.

Case Story #3:

Client is a 69 year old Hispanic senior, homeowner. Two years ago the client, her daughter and grandson entered into a verbal rental agreement allowing the daughter and grandson to move in with her. They would pay \$325/month plus ½ of utilities. The client stated that the daughter had not paid her even though unemployed, she has been receiving VA benefits of over \$1,000/month. Instead of paying rent and utilities she spends her income on other things. The client is tired of supporting both her daughter and grandson, her only source of income is Social Security. Advocate advised client that the verbal agreement is binding and she would first need to serve them with a 3 Day Notice to Pay or Quit and she could only ask for 1 years worth of rent even though more was owed. If they do not pay or move out in 3 days she could file an Unlawful Detainer lawsuit against them and would need to have them served. The court would set a hearing date to hear both sides, and if the court rules in her favor she would be awarded with a judgment. If they do not move, client can petition the court for a Writ of Possession giving them 5 days to move or the Sheriff will lock them out/evict them from her home. The client would then be able to after their assets to collect for unpaid rent and ICLS would be able to assist her. The client later informed the advocate that she had come to a new agreement with her daughter and she was going to give them another chance. Advocate advised client to get this in writing and to include all of the terms that the parties are to abide by. The client was pleased and grateful to know she had a recourse and that ICLS would be able to assist her.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 21

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success  
Story(ies)/Case Summary(ies)

Client Story #1:

Client fell behind on HOA fees. She made agreement with the Board to pay current fees and her arrears. Included in the fees from the HOA Board was a continual late fee assessment each month. Advocate researched the legality of the above fee (C.C.C. sec. 1367.1) and contacted the opposing counsel. They agreed to remove the late fees and to not charge any further late fees on the arrears account.

Client Story #2:

Client had guardianship of 3 minor grandchildren. She is a SSA representative payee for the grandchildren as well as the representative payee for her daughter, the mother of the grandchildren. The monthly benefits were about to stop unless the client provided documents that SSA was requesting. Advocate advised client that a hearing should be requested. The client just wanted to provide the information and see what SSA stated the correct amount was. Advocate advised client that there was no way to be sure that the correct amount was being applied to the calculations. Advocate worked with client for months attending meetings with the SSA representative and providing all requested documents. Also advised the client that she write a letter telling SSA to make a decision so that she would decide if she wanted to appeal the amounts stated. SSA finally made their decision and in a letter stated that the client as representative payee (x4) would receive a total of \$22,199 in retroactive benefits; a total of \$753/month for each grandchild and \$1,406/month for her daughter. The client decided to not appeal further.

Client Story #3:

Client and wife assessed with an SSI overpayment of approximately \$17,000. SSA had determined that the client and his wife owned property that had not been reported and thus causing them to be over the asset level. SSA stated that the client owns property in Afghanistan. The client does not. His deceased father's estate has yet to be determined. The father's home had been stolen. The client's family is in legal litigation in hope of getting the home back into the father's name so that the estate can be divided between 12 family members. The client is not sure if the legal battle will ever be over, or if the family will continue to pursue the action. In the meantime, SSA stated (at the day of the hearing only and with no forewarning in the exhibit file) that client does own property in Afghanistan because an anonymous tip was provided to the Office of Inspector General. The hearing was adjourned and the judge gave us 10 days to submit any additional evidence. ICLS provided a letter to the judge. A declaration (from the client) was provided to the judge. There was no further ascertain or written evidence that the client owned property in Afghanistan. The judge ruled overpayment waiver entirely.

Client Story #4:

Client was denied MediCal. CDHS alleged client was not disabled and therefore not eligible for MediCal. MediCal has a 2 prong test (1) are you disabled, and (2) are you financially eligible. Advocate went to hearing and argued that client did not need to prove disability because she is 65 and is automatically entitled to MediCal because she is considered aged. It is now only a matter of determining if she is financially eligible.

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

**Client Story #5:**

Client is elderly and needed assistance with property issues that arose after death of her husband. The client needed assistance in transferring title from both her husband's name and hers. Specifically there were issues with a home and a vehicle. The advocate researched the issues and obtained information and documents on the Affidavit of Joint Tenants. Advocate provided the required information to the client on how to transfer the documents providing the client the ability to handle the issues herself.

**Client Story #6:**

Assisted 76 year old client whose IHSS hours had been reduced. Advocate represented client at hearing and stipulated on the record that client be evaluated again for assessment of need. Outcome: The need for meal prep, meal clean up, dressing and bathing were increased. Previous IHSS hours of 52.8 hrs./month were increased by 20.3 hrs. to 73.1 hrs./month. Client was also assisted with a smog certification issue. Client's vehicle did not pass smog test. Advocate filed a waiver with the Bureau of Automotive Repair (BAR). The waiver for the fix, completing of the fix and passing the smog test were all paid for by BAR.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 22**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success  
Story(ies)/Case Summary(ies)

We assisted an 84 year old Santa Ana resident in obtaining a Hardship Waiver on a Medi-Cal Estate Claim. Client and 2 sisters lived in a small house. One sister, following a nursing home stay, died. The House was held in joint tenancy. Client was notified of a claim against her sister's estate of about \$42K. Both client and her surviving sister are retired with limited income. Client filed a Waiver Request but the application was missing required documentation. We helped obtain and provide the required documents and additional information supporting her Waiver Request. The Department Of Health Care Services issued a Report of Findings granting the Waiver.

We also received favorable decisions in two SSI cases in which we represented clients whose primary language is Vietnamese. In one case, a 78 year old client appealed a termination of SSI benefits. We were able to show that client's resources did not exceed the resource limit and client continues to receive her benefits. In the second case, client was notified of an overpayment of \$6,000. Following a hearing before an Administrative Law Judge, we received a decision waiving collection of the overpayment.

Optional Information on  
Collaboration with Other  
Advocacy Groups

In February, we attended that Senior Legal Service Providers/ Model Approaches Retreat in San Francisco. The Retreat offered an opportunity to meet and work with other programs around the state providing legal services to the elderly. As part of the Model Approaches grant, we discussed issues concerning targeting legal services to seniors with the greatest needs.

We also participated in February in the Elder Abuse Forensic Center (EAFC) Retreat. The EAFC team includes representatives from APS, the Ombudsman Program, Legal Aid, UCI, local police departments and the District Attorney's Office.

PSA: 23

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success  
Story(ies)/Case Summary(ies)

Client is a Viet Nam War veteran who suffers from severe Post Traumatic Stress Disorder. The PTSD significantly impedes his ability to deal with any, even minor, stressful events.

Client needed repair work done on a Volkswagen van and, in October 2011, he took the van to a specialty repair shop in Costa Mesa, California. Client and the owner of the shop verbally agreed to certain repairs to be conducted. Client left the van at the shop and gave the owner \$500 cash, up front, and trusted that the repairs would be done as agreed. Client did not receive a written estimate or a receipt for his \$500. Client was adamant with the owner that the van be stored in the fenced-in, back part of the shop to protect it from theft. Owner agreed to do so.

Client was to receive a final invoice from the owner when the repairs were completed. Client assumed that the owner would update client as the repairs were being conducted.

After about a month had gone by and client had not heard back from the shop owner, he drove to the shop to personally discuss the status of repairs with the owner. When client arrived at the shop, he was shocked to find the vehicle parked in the same spot that he had left it when he first brought the vehicle in. It had apparently not been moved to the safe, fenced in area as the owner had promised.

The shop owner was not on the premises then and client became concerned about the van's safety as it was still parked out in front of the shop. Client talked to other storeowners, nearby, who told him that the van had never been moved from its original parking spot. Due to the stress this caused client, he decided to have the van towed and have the owner of the shop discontinue any further repairs.

Client asked for any assistance that Elder Law & Advocacy could provide him. At the time he contacted Elder Law & Advocacy, he expressed his feelings of severe anxiety and depression, which were extremely debilitating as a result of this matter. He also expressed that as a Veteran, he felt unappreciated by society and felt that no one would listen to or help him. He felt hopeless.

The Elder Law & Advocacy attorney called the shop owner to discuss this case. The shop owner denied that the van was never moved to a safe area in the shop and he also stated that he did conduct repairs on the van worth in excess of \$250. The owner advised me that some months ago, he agreed with client to refund \$250, provide a description of the work done, and return client's keys. According to the shop owner, he had tried to send this to the client, on multiple occasions, but the package was always returned to him as undeliverable.

I confirmed shop owner's version of events with the Bureau of Automotive Repairs, who also conducted an investigation in this matter, and they were aware of the shop owner's offer and acceptance by client to resolve this matter.

I arranged with the shop owner to have him send the \$250 refund check, the description of the repairs

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**Quarter: 3**

made and the keys to me and that I would ensure that client received these.  The shop owner sent these items, as promised, and I handed them to client. Client was very grateful as his PTSD prevented him from handling the pressure of spending any more time on this matter to get it resolved.
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Optional Information on  
Collaboration with Other  
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.
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**PSA: 24**

**Provider: Elder Law & Advocacy**

**Counties: Imperial**

Optional Success  
Story(ies)/Case Summary(ies)

<p>An 84 year old Client came to the Imperial County office with a check he could not cash. The check was the returned security deposit for an apartment that Client and his spouse had been renting for several years. Client's spouse had recently passed away, prompting client to move to a smaller apartment. The security deposit for Client's former residence was returned to him in the form of a check made out to both Client and his spouse, and Client's bank refused to allow him to deposit the check without letters testamentary.</p> <p>Elder Law &amp; Advocacy's staff attorney discussed with the Client the process for putting his spouse's estate through probate. However, his spouse's estate was negligible, well under the \$100,000 threshold which would require her estate go through probate, and the only estate property the Client had not yet been able to settle was this security deposit refund check. Rather than dealing with the bank directly, the staff attorney offered to work with the Client's former landlord to resolve the matter.</p> <p>The former landlord seemed happy to work with the staff attorney, and agreed to reissue the check in the Client's name only, so long as Client returned his original check. The Client brought the original check into the Imperial County office, which was then passed along to the former landlord, who in turn reissued a security deposit refund check in just the Client's name. The Client was satisfied with the result and relieved to have the matter resolved so easily.</p>
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Optional Information on  
Collaboration with Other  
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.
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**PSA: 25**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

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**Provider: Bet Tzedek Legal Services**

**Counties: Los Angeles City**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 26**

**Provider: Senior Law Project, Inc.**

**Counties: Lake and Mendocino Counties**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

The Senior Law Project attorney, in collaboration with Legal Services of Northern California, provided comments to the Lake County Board of Supervisors regarding the need for effective Universal Design Programs in the County's Housing Element.

**PSA: 27**

**Provider: COUNCIL ON AGING**

**Counties: SONOMA**

Optional Success  
Story(ies)/Case Summary(ies)

Assisted in reversing a \$150/month Social Security offset for client. Medicare sought reimbursement for payment of benefits client received following an industrial injury. Medicare should have been reimbursed by Worker's Compensation Insurance. After worker's compensation attorney had no contact and no return calls to client for several years, we requested that the he petition for a Worker's Compensation court hearing to request that Worker's Comp reimburse Medicare. The worker's comp attorney facilitated 2 court hearings in 2011 and prevailed. The court decision resulted in a reversal of the offset and a retroactive reimbursement to client for SS retirement benefits that were garnished. Worker's Compensation Insurance agreed to reimburse Medicare on behalf of client.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 28**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

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**Provider: Legal Aid of Napa Valley**

**Counties: Napa**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**Provider: Legal Services of Northern California**

**Counties: Solano**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline.  
Continued participation with community groups including: FAST, Solano Senior Coalition, and Vallejo  
Senior Roundtable.

**PSA: 29**

**Provider: Senior Legal Services**

**Counties: El Dorado**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 30**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

**Provider: Dor v' Dor Senior Advocacy Network**

**Counties: Stanislaus**

Optional Success  
Story(ies)/Case Summary(ies)

1. We successfully reinstated SSI payments for 3 seniors whose payments had been terminated for various reasons. Once their SSI was reinstated, we were successful in reinstating their Medicaid benefits.  
2. We have been successful in negotiating bill disputes and stopping creditor harassment.  
3. We have successfully filed and obtained restraining orders for 27 seniors/dependent adults.  
4. We have added 6 new volunteers: 1 attorney, 1 law school graduate, 4 legal assistants  
5. We tried our first civil trial, Breach of Contract, Elder Abuse case. We prevailed at trial on the breach of contract issue and were awarded attorney's fees. That award of attorney's fees is in dispute and may require further briefing if the judge agrees with the defendant.

Optional Information on  
Collaboration with Other  
Advocacy Groups

•Senior Law Project has seen 2 clients under the age of 60 for restraining orders referred to us by Adult Protective Services. These clients were disabled adults and therefore fit the APS criteria for referral to Senior Law Project for restraining orders. This number is not included in the tally because there is no place for clients under the age of 60.

**PSA: 31**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: Central California Legal Services

Counties: Merced

Optional Success  
Story(ies)/Case Summary(ies)

JANUARY 2012

Case No. 11E- 3005025, Client, 70 year old man who supports his disabled wife, unemployed granddaughter and her two children (client's great-grandchildren) on a fixed income, found himself in deep financial debt with creditors. Client entered into an unfavorable contract with a law firm that obtained power of attorney over client's finances to allow law firm to negotiate debt settlements for client. Law firm charged client high monthly service fees and placed him on a payment plan he could no longer afford. Law firm may have mislead client about their inability to assist him with two law suits that were filed against him by creditors law firm was supposed to be negotiating with, which resulted in two judgments against client. Attorney assisted client with revoking the power of attorney for the law firm and with terminating the legal representation. Attorney then advised client on his options for resolving the outstanding debts.

Case No. 11E-3006281, Client, 80 year old low income male, who is Spanish speaking only, sought attorney's advice as to why an auto mechanic who previously repaired his vehicle now refused to do so. Attorney conducted an investigation into the matter and determined that client was making his own repairs to the vehicle and hiring the auto mechanic to make additional repairs. Attorney advised client on auto mechanic's right to stop making repairs to the vehicle, following client's attempt to make repairs, because auto mechanic could no longer warrant the quality of his work. Attorney also advised client that auto mechanic could not reasonably diagnose or begin to repair the underlying problem with the vehicle, unless he first fixed client's attempted repairs, which auto mechanic was unable to safely do.

Case No. 11E-3006865, Client, 92 year old low income woman, sought assistance with preparing her first Will, Power of Attorney and Advance Health Care Directive. Attorney advised client on importance and function of each document and assisted client with completing all three documents.

FEBRAURY 2012

Case No. 12E-3000630, Client, 67 year old very ill woman who helps support a household of 5 on her fixed income, had an order entered against her by a judgment creditor a few months ago. Client received a Notice of Levy from the creditor, wherein the creditor attempted to garnish client's sole bank account to recover the judgment amount. Attorney assisted client by drafting and filing a Claim of Exemption and a detailed Financial Statement to dispute the attempted levy.

Case No. 12E-3000318, Client, 72 year old, low income and legally blind man sought attorney's assistance to prepare a Power of Attorney for his finances. Attorney completed the Power of Attorney and notarized it for client. Attorney also advised client on how to properly use the Power of Attorney.

Case No. 12E-3000371, Client, 76 year old, low income and rural man requested an urgent appointment with attorney after being served with a 60 Day Notice to Quit. Client had been living at his home for twelve years on an oral lease and was shocked by the notice. Attorney met with client and advised him on his rights and responsibilities as a tenant, after receiving the notice. Attorney assisted client with negotiating a later move out date and reasonable last month's rent terms. Client was able to successfully locate new affordable housing in the same neighborhood, which will allow client's child to continue to attend the same elementary school. Client's new landlord also agreed to accommodate client's large population of breeder rabbits, which help to supplement client's income.

**California Legal Services (Title III B)**  
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MARCH 2012

Case No. 11E-3006363, 66 year old, low income, Spanish speaking only client sought attorney's assistance with receiving a refund from a non-licensed mechanic who failed to perform repairs on client's car and damaged it in a joy ride. Attorney advised client not to use non-licensed auto mechanics in the future; and on client's rights to pursue a claim with his auto insurance company and the small claims court.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 32**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2011-2012

Quarter: 3

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success  
Story(ies)/Case Summary(ies)

Case Number 1: At our King City outreach, our advocate Diana Leon met with a woman living at the very outskirts of Monterey County. The client wanted a restraining order against a tenant in her house. Diana's lengthy interview revealed the client had allowed a woman (and her three dogs and two horses) to move into client's home at the end of January 2012 with no written or oral rental agreement. Even though the client now wanted her to leave, Diana explained restraining orders cannot be used to sidestep the normal unlawful detainer process. The client also stated she not only had a tenant in her home, she was also letting "just a few people" live in RVs on her property, (a violation of Monterey County zoning and building codes) "to make ends meet." We determined the best course for our client was to go through a proper unlawful detainer and to clean up her property, since there was a high probability she would be cited by County officials if she continued to allow people to live in unsafe conditions. LSS rarely becomes involved with a client like this, but we took the time to work with this client because educating her on proper/legal housing and rental regulations were not only going to help her avoid County problems but avoided creation of future unsafe and illegal living conditions for other individuals.

Case Number 2: A recent client, 78 years old, overweight with two hip replacements, slipped while taking a shower, dislocating the appliance in his hip. His 72-year old wife could not maneuver him upright so she called 911 and the ambulance transported our client to the hospital. The client later had surgery to replace the dislocated implant.

Another client came to us with a denial of his deceased wife's last ambulance trip. Our client's wife was suffering from leukemia and when she became extremely weak, unable to talk or walk our client called 911 and his wife was transported to the hospital where she died a few hours later.

Medicare denied payment on both these transports as not "medically necessary" although these individuals were clearly not calling a cab or driving themselves to the hospital. Of course when LSS got involved the denials were overturned and the claims paid. But the past few months we've had such an increase in these ambulance denials that Alliance on Aging's HICAP (Health Insurance and Counseling Program) Program Manager Tamara McKee and I are looking into why there's such an uptick in cases where the claims were clearly merited. Ambulance rides generally run from \$3,000 to \$6,000; for every claim we see, we know there are other potential clients who just accept Medicare's decision and pay the claim, an unnecessary financial drain on our clients.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors, together with Meals on Wheels of the Salinas Valley, Meals on Wheels of the Monterey Peninsula, Alzheimer's Association, Long Term Care Ombudsman, and the Alliance on Aging continued in a multi-year collaboration to collectively promote their programs serving Monterey County seniors. This collaboration has produced a local newspaper magazine style supplement and maintains a common toll-free telephone line (2-1-1) for client referrals. Legal Services for Seniors provides staff training with these other organizations develop awareness of LSS' program and facilitate inter-program referrals.

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2011-2012**

**Quarter: 3**

Legal Services for Seniors is the legal arm for the Monterey County HICAP program. Referrals are made by the HICAP director to LSS. Non-legal health insurance issues encountered by LSS are referred in turn to HICAP.  
Legal Services for Seniors supplies legal representation to grandparents and other seniors obtaining court ordered guardianships of minor children by referrals made by staff family services counselors at the Kinship Center Program in Monterey County.

**PSA: 33**

**Provider: Greater Bakersfield Legal Assistance, Inc.    Counties: kern**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated