

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

Public and Media Data Report

Type of Activity	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Interactive Presentations to Public in Person					
Total Number of Events	25	14	6	8	53
Estimated Number of Attendees	632	264	189	225	1,310
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	15	15
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	12	1	2	6	21
Estimated Number of Attendees	491	82	77	190	840
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	2	0	0	0	2
Estimated Number of Attendees	33	0	0	0	33
Estimated Number of Persons Received Any Enrollment Assistance	3	0	0	0	3
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	1	0	0	0	1
Enrollment Assistance with LIS	1	0	0	0	1
Enrollment Assistance MSP	1	0	0	0	1
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	1	1	0	1	3
Estimated Number of Attendees	15,000	10,000	0	10,000	35,000
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	1	3	0	0	4
Estimated Number of Attendees	20,000	48,000	0	0	68,000
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	6	0	2	0	8
Estimated Number of Persons Reached	90,000	0	86,000	0	176,000

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Other Print Activity (newspaper articles, fliers, pamphlets, etc.)					
Total Number of Print Activities	20	12	0	1	33
Estimated Number of Targeted Persons Reached	10,188	85,095	0	25	95,308
Presenters					
HICAP Paid Staff					
Total Presenters	65	31	10	15	121
Total Hours for Length of Activities	211.15	25.35	52.55	69.55	358.60
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	8	0	0	1	9
Total Hours for Length of Activities	65.15	0.00	0.00	1.00	66.15
Other Presenters					
Total Presenters	2	4	0	1	7
Total Hours for Length of Activities	2.50	0.00	0.00	0.00	2.50
Area of Focus					
Dual Eligible with Mental Illness	6	14	5	3	59
Employer Termination - COBRA	43	8	1	7	9
General HICAP Information	3	3	0	3	123
Grievances / Appeals - Plan Issues	67	30	10	16	2
Long-Term Care / Insurance	0	0	1	1	7
Low Income Subsidy (LIS) / Application Assistance	2	4	1	0	91
Medicare (Parts A & B)	59	13	7	12	100
Medicare Advantage (Part C)	60	17	8	15	93
Medicare Fraud / Abuse	56	19	6	12	96
Medicare Prescription Drug Coverage (Part D)	53	22	6	15	101
Medigap / Medicare Supplements	61	19	7	14	63
Non-Medicare Fraud/Abuse	29	16	6	12	0
Other Topics / Issues (Health Specific)	0	0	0	0	5
	1	3	0	1	

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	39	9	4	12	64
Preventive Care Benefits	33	13	5	12	63
QMB/SLMB/QI	55	16	7	14	92
Volunteer Recruitment	26	11	8	10	55
Targeted Audience					
African American	18	9	4	10	41
American Indian or Nataive Alaskan	23	9	4	11	47
Asian Indian	8	6	2	1	17
Caucasian	43	17	10	15	85
Chinese	9	8	4	5	26
Disabled	33	13	4	9	59
Dual Eligible Groups	19	8	2	7	36
Employer Related Groups	7	7	1	4	19
Family Member/Caregiver of Beneficiary	37	16	4	9	66
Filipino	7	8	4	3	22
Guamanian or Chamorro	5	7	1	1	14
Hispanic / Latino	15	10	5	7	37
Hmong	7	6	2	2	17
Japanese	7	8	4	2	21
Korean	7	8	4	1	20
Low Income	37	22	3	10	72
Medicare Beneficiaries	40	25	5	13	83
Medicare Pre-Enrollees	39	13	6	8	66
Mental Health	23	12	3	7	45
Mental Health Professionals	16	10	4	6	36
Native Hawaiian	5	7	2	1	15
Other	21	7	0	1	29
Other Asian	4	7	2	1	14
Other Pacific Islander	4	7	2	1	14
Partnership Outreach	43	13	6	11	73
Presentations to Groups in Language Other than English	1	6	0	1	8
Rural	39	17	5	12	73
Samoan	7	6	2	1	16
Socail Work Professionals	25	12	5	13	55
Some Other Race or Ethnicity	2	6	0	2	10
Vietnamese	5	6	3	5	19

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

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	302	362	349	221	1,234
Literature from Events					
General HICAP Brochure	1,587	428	241	412	2,668
"Taking Care of Tomorrow"	8	0	0	0	8
Other Publications (Created by or on Behalf of Local HICAP)	1,592	787	223	644	3,246
Other Literature					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	1	0	1

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	458	1,506	563	461	2,988
Total Finalized Intakes	269	1,286	439	370	2,364
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	93	222	167	174	656
Aging into Medicare Postacd - CDA HICAP	12	2	0	1	15
CDA HICAP	8	10	12	1	31
CHA	0	0	0	0	0
CMS/Medicare	4	6	2	1	13
Friend/Relative	42	166	67	53	328
InfoVan	0	0	0	0	0
Internet	0	1	0	0	1
Mailings	3	31	7	5	46
Media	14	44	5	2	65
Other	17	79	29	23	148
Presentations	9	64	3	1	77
Previous Contacts	61	649	139	106	955
State Website	0	0	0	0	0
Missing/Not Collected	6	12	8	3	29
Mode of Client Contact					
Quick Call Contacts	698	1,351	478	408	2,935
Contacts by Telephone	72	194	99	134	499
Contacts In Person at home	3	33	2	4	42
Contacts In Person at site	238	1,079	412	432	2,161
Contacts by E-Mail	0	2	7	0	9
Contacts by Mail/Fax	4	57	3	18	82
Total Number of Client Contacts:	1,015	2,716	1,001	996	5,728
Contact Status Types					
General info	143	98	37	121	399
Detailed Assistance	133	1,248	416	779	2,576
Problem Solving/Resolution	42	81	79	108	310
Total Counseling Time Spent by Counselor Type					
Program Manager	27.02	116.23	50.06	57.53	250.84
Volunteer	79.00	594.37	88.15	138.58	900.10
Paid	160.08	528.34	274.48	264.28	1,227.18
In-Kind	0.00	30.00	0.30	7.00	37.30
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	4	20	8	11	43
Race					
African American/Black	0	4	1	7	12

From: 07/01/2011 To: 06/30/2012

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	1	10	6	2	19
Caucasian/White	212	992	297	256	1,757
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	1	0	3	4
Chinese	0	1	0	0	1
Filipino	0	5	0	2	7
Japanese	0	1	0	2	3
Hmong	0	0	0	1	1
Korean	0	0	0	0	0
Vietnamese	2	13	6	12	33
Other Pacific Islander	0	0	0	0	0
Other Asian	0	1	1	1	3
Two or More Race	0	1	1	1	3
Some Other race	3	11	2	1	17
Not Collected	51	246	125	82	504
Gender					
Female	142	751	237	183	1,313
Male	109	468	160	152	889
Not Collected	18	67	42	35	162
Monthly Income					
Less than 150% of FPL	72	195	82	95	444
Equal To/Greater than 150% of FPL	102	485	131	127	845
Not collected	95	606	226	148	1,075
Client Asset Limits					
Below LIS Asset limit	20	62	31	23	136
At or Above LIS Asset Limit	7	34	9	17	67
Not Collected	242	1,190	399	330	2,161

From: 07/01/2011 To: 06/30/2012

Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Total Clients that Checked Yes as Being					
Veteran	30	132	53	31	246
Limited English Proficient (LEP)	4	6	4	8	22
Dual Eligible	65	237	74	80	456
Medicare Status Due to Disability	75	221	89	81	466
Dual Eligible due to Mental Disability	11	49	14	15	89
Applying/Receiving Social Security/Medicare Disability	72	205	83	90	450
Age					
Under 60	38	121	48	58	265
60-64	23	72	33	75	203
65-74	133	591	216	136	1,076
75-84	40	318	91	58	507
85+	15	126	35	18	194
Not Collected	20	58	16	25	119
Marital Status					
Married	106	561	154	150	971
Never Married	18	40	13	27	98
Separated	6	18	6	8	38
Divorced	50	174	64	61	349
Widowed	34	231	65	39	369
Domestic Partner	1	10	2	1	14
Not Collected	54	252	135	84	525
Estimated Financial Saving					
Clients with Financial Savings	31	260	38	31	360
Estimated Dollars Saved	\$42,118.80	\$241,986.55	\$75,209.82	\$75,080.29	\$434,395.46

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

	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	200	1,095	419	362	2,076
Benefit Comparisons/Explanation/Coverage Changes	130	403	184	212	929
Appeals/Grievances	2	4	3	3	12
Billings/Claims	17	14	24	33	88
Fraud/Abuse	0	100	80	101	281
Quality of Care	1	0	0	0	1
LTC/LTCI					
Enrollment/Eligibility Assistance	8	7	2	4	21
Billings/Claims	1	0	0	1	2
LTC Partnership	2	0	0	0	2
Appeal/Grievances	0	0	0	0	0
Fraud/Abuse	0	0	0	1	1
Other LTC	0	1	0	0	1
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	123	484	219	222	1,048
Benefit Explanation	114	440	209	182	945
Appeals/Grievances	1	3	0	0	4
Billings/Claims	7	6	11	13	37
Fraud/Abuse	0	13	11	15	39
Disenrollment/Coverage Changes	9	6	3	4	22
Quality of Care	0	1	1	0	2
Plan Comparison	53	303	150	112	618
Marketing/Sales Complaints/Issues	0	3	1	1	5
Plan Non Renewal	0	1	1	1	3
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	100	358	170	179	807
Benefit Explanation	86	322	143	145	696
Appeals/Grievances	2	0	1	5	8
Billings/Claims	4	2	10	6	22
Fraud/Abuse	0	20	5	6	31
Coverage Changes/Disenrollment	11	47	62	22	142
Plan Non Renewal	0	252	63	3	318
Plan Comparison	40	221	78	63	402
Enrollment/Enrollment Assistance	7	39	7	2	55
Quality of Care	0	2	0	2	4
Marketing/Sales Complaints or Issues	0	4	3	1	8
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	13	21	9	40	83
Medi-Cal Application Assistance	2	5	1	1	9

From: 07/01/2011 To: 06/30/2012

Topics/Needs Discussed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
MSP Screening (QMB, SLMB, Q-1)	165	850	309	295	1,619
MSP Application Assistance	7	18	18	19	62
Medi-Cal/QMB Claims	4	3	2	1	10
Fraud/Abuse	0	1	2	8	11
Other	17	19	8	7	51
Other					
Employer/Federal Health Benefits (FEHB)	44	54	42	63	203
Military Benefits	22	37	13	17	89
COBRA	1	5	3	4	13
Mental Health Topics	9	6	8	18	41
Fraud/Abuse	1	88	2	1	92
Other Health Insurance	2	9	7	9	27
Other	4	7	3	12	26
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	211	1,199	364	302	2,076
Eligibility/Screening	179	1,170	341	307	1,997
Plan Comparison	113	1,087	248	168	1,616
Enrollment/Anrollment Assistance	45	616	129	76	866
Billings/Claims	2	4	6	6	18
Coverage Changes	5	70	12	4	91
Re-enrollment	1	8	2	0	11
Disenrollment	3	5	3	2	13
TROOP	3	61	18	4	86
Other	5	16	15	8	44
LIS / Extra Help					
Eligibility / Screening	155	894	313	279	1,641
Benefit Explanation	90	364	148	167	769
Application Assistance	21	46	42	26	135
Claims/Billings	3	1	3	2	9
Appeals / Grievances	0	1	0	0	1
Other Prescription Drug CoveragePlans					
Union/employer	18	30	16	29	93
PPARx	9	8	0	4	21
Military Drug Benefit	12	37	18	14	81
Manufacturer Program	0	0	0	1	1
Other	1	3	2	7	13
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	6	8	3	7	24
Lag Time	0	4	1	0	5
Multiple Enrollment	0	3	0	1	4
Poor Training of Agents	0	2	0	0	2
Poor Training of CSR	0	1	0	0	1

From: 07/01/2011 To: 06/30/2012

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	1	0	0	1
Agent fraud/abuse	0	1	0	0	1
Formulary problems/changes	7	5	4	2	18
Dosage problem	0	0	0	0	0
Data problems	2	3	5	3	13
Delay in medications	0	0	0	0	0
Incorrect Co-Pay/Can't Afford Co-Pay	3	0	2	1	6
Client reached donut hole	1	5	0	3	9
SSA Premium withheld	0	0	0	2	2
Appeals/Grievances	0	2	0	2	4
Quality of Care	0	1	0	0	1
Plan Non Renewal	0	29	10	1	40
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 2 - HICAP Services of Northern California

From: 07/01/2011 To: 06/30/2012

Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Medicare Part D Complaints Filed					
CDI:	0	1	0	0	1
CMS:	0	0	0	1	1
Part D Plan:	0	2	0	0	2
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	2	0	0	2
Other:	4	13	9	9	35
TOTAL MEDICARE PART D COMPLAINTS	4	18	9	10	41
All Other Complaints					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	1	0	0	0	1
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
TOTAL ALL OTHER COMPLAINTS	1	0	0	0	1
800 Medicare Line Issues					
Total number of Calls with Issues	24	42	37	33	136
Total duration of calls	3.18	7.06	17.37	17.50	45.11