

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

## Program: PSA 3 - Passages - HICAP

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	
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	34	60	20	20	<b>134</b>
Estimated Number of Attendees	718	1,353	355	341	<b>2,767</b>
Estimated Number of Persons Provided Enrollment Assistance	1	14	12	0	<b>27</b>
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	7	11	5	9	<b>32</b>
Estimated Number of Attendees	1,745	1,365	212	2,815	<b>6,137</b>
Estimated Number of Persons Provided Enrollment Assistance	1	2	0	0	<b>3</b>
<b>Mobile InfoVan Events</b>					
Total Number of Events	8	0	0	0	<b>8</b>
Estimated Number of Attendees	1,370	0	0	0	<b>1,370</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	2	0	1	<b>3</b>
Estimated Number of Attendees	0	9	0	12	<b>21</b>
Estimated Number of Persons Received Any Enrollment Assistance	0	1	0	0	<b>1</b>
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	<b>0</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	1	0	0	<b>1</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	1	0	0	0	<b>1</b>
Estimated Number of Attendees	5,000	0	0	0	<b>5,000</b>
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	1	0	1	<b>2</b>
Estimated Number of Attendees	0	15,000	0	150,000	<b>165,000</b>
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	5	2	9	9	<b>25</b>
Estimated Number of Persons Reached	24,004	16,000	859,849	86,030	<b>985,883</b>

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

### Program: PSA 3 - Passages - HICAP

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
<b>Other Print Activity (newspaper articles, fliers, pamphlets, etc.)</b>					
Total Number of Print Activities	11	19	55	46	<b>131</b>
Estimated Number of Targeted Persons Reached	24,095	72,553	172,449	281,880	<b>550,977</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	47	75	67	43	<b>232</b>
Total Hours for Length of Activities	126.50	246.20	121.15	132.50	<b>626.35</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	5	10	19	37	<b>71</b>
Total Hours for Length of Activities	31.30	43.20	34.00	75.20	<b>183.70</b>
<b>Other Presenters</b>					
Total Presenters	2	2	4	4	<b>12</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	16	64	9	6	<b>50</b>
Employer Termination - COBRA	10	29	5	6	<b>0</b>
General HICAP Information	0	0	0	0	<b>321</b>
Grievances / Appeals - Plan Issues	66	92	85	78	<b>12</b>
Long-Term Care / Insurance	6	5	1	0	<b>20</b>
Low Income Subsidy (LIS) / Application Assistance	4	4	4	8	<b>214</b>
Medicare (Parts A & B)	34	57	53	70	<b>171</b>
Medicare Advantage (Part C)	38	54	27	52	<b>152</b>
Medicare Fraud / Abuse	40	88	11	13	<b>134</b>
Medicare Prescription Drug Coverage (Part D)	29	65	16	24	<b>253</b>
Medigap / Medicare Supplements	49	89	51	64	<b>121</b>
Non-Medicare Fraud/Abuse	35	57	12	17	<b>6</b>
Other Topics / Issues (Health Specific)	0	0	2	4	<b>35</b>
	20	7	6	2	

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

**Program: PSA 3 - Passages - HICAP**

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	12	4	12	13	<b>41</b>
Preventive Care Benefits	36	68	14	17	<b>135</b>
QMB/SLMB/QI	36	60	62	71	<b>229</b>
Volunteer Recruitment	12	6	8	13	<b>39</b>
<b>Targeted Audience</b>					
African American	22	21	32	36	<b>111</b>
American Indian or Nataive Alaskan	21	24	32	30	<b>107</b>
Asian Indian	11	4	23	24	<b>62</b>
Caucasian	42	76	73	73	<b>264</b>
Chinese	12	8	26	26	<b>72</b>
Disabled	39	59	50	54	<b>202</b>
Dual Eligible Groups	42	49	51	65	<b>207</b>
Employer Related Groups	14	10	15	14	<b>53</b>
Family Member/Caregiver of Beneficiary	52	70	73	78	<b>273</b>
Filipino	14	8	23	27	<b>72</b>
Guamanian or Chamorro	12	3	25	25	<b>65</b>
Hispanic / Latino	28	23	65	62	<b>178</b>
Hmong	16	14	25	30	<b>85</b>
Japanese	12	5	25	26	<b>68</b>
Korean	11	4	23	23	<b>61</b>
Low Income	47	73	66	73	<b>259</b>
Medicare Beneficiaries	53	80	74	79	<b>286</b>
Medicare Pre-Enrollees	38	39	49	70	<b>196</b>
Mental Health	28	37	34	39	<b>138</b>
Mental Health Professionals	22	13	21	23	<b>79</b>
Native Hawaiian	13	4	19	23	<b>59</b>
Other	4	2	3	0	<b>9</b>
Other Asian	7	0	4	5	<b>16</b>
Other Pacific Islander	7	0	7	3	<b>17</b>
Partnership Outreach	29	11	21	18	<b>79</b>
Presentations to Groups in Language Other than English	1	2	25	25	<b>53</b>
Rural	45	61	56	73	<b>235</b>
Samoan	11	5	21	25	<b>62</b>
Socail Work Professionals	34	20	22	40	<b>116</b>
Some Other Race or Ethnicity	1	0	1	0	<b>2</b>
Vietnamese	11	7	19	25	<b>62</b>

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

### Program: PSA 3 - Passages - HICAP

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
<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	1,134	2,039	887	387	<b>4,447</b>
"Taking Care of Tomorrow"	60	93	15	0	<b>168</b>
Other Publications (Created by or on Behalf of Local HICAP)	2,962	3,410	943	798	<b>8,113</b>
<b>Other Literature</b>					
Other Literature	0	0	0	0	<b>0</b>
Brochures from Quick Call	8	36	38	30	<b>112</b>

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

## Program: PSA 3 - Passages - HICAP

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

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	767	1,874	1,110	878	<b>4,629</b>
Total Finalized Intakes	366	1,214	608	391	<b>2,579</b>
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	93	111	111	86	<b>401</b>
Aging into Medicare Postacd - CDA HICAP	3	5	1	0	<b>9</b>
CDA HICAP	3	16	6	3	<b>28</b>
CHA	0	0	0	0	<b>0</b>
CMS/Medicare	19	49	40	11	<b>119</b>
Friend/Relative	57	144	99	82	<b>382</b>
InfoVan	0	1	0	0	<b>1</b>
Internet	1	1	2	3	<b>7</b>
Mailings	3	20	6	1	<b>30</b>
Media	16	53	12	28	<b>109</b>
Other	46	76	68	38	<b>228</b>
Presentations	15	74	25	9	<b>123</b>
Previous Contacts	101	588	229	122	<b>1,040</b>
State Website	0	0	0	1	<b>1</b>
Missing/Not Collected	9	76	9	7	<b>101</b>
<b>Mode of Client Contact</b>					
Quick Call Contacts	1,095	2,541	1,507	1,298	<b>6,441</b>
Contacts by Telephone	454	929	931	580	<b>2,894</b>
Contacts In Person at home	18	42	35	14	<b>109</b>
Contacts In Person at site	215	378	260	228	<b>1,081</b>
Contacts by E-Mail	45	185	138	41	<b>409</b>
Contacts by Mail/Fax	153	768	334	176	<b>1,431</b>
<b>Total Number of Client Contacts:</b>	<b>1,980</b>	<b>4,843</b>	<b>3,205</b>	<b>2,337</b>	<b>12,365</b>
<b>Contact Status Types</b>					
General info	481	1,467	770	538	<b>3,256</b>
Detailed Assistance	947	2,884	1,894	1,149	<b>6,874</b>
Problem Solving/Resolution	98	156	105	103	<b>462</b>
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	101.45	166.28	74.50	33.29	<b>375.52</b>
Volunteer	254.10	631.13	557.18	260.53	<b>1,702.94</b>
Paid	125.19	381.49	263.02	218.55	<b>988.25</b>
In-Kind	4.25	21.40	12.25	16.55	<b>54.45</b>
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	22	56	41	19	<b>138</b>
<b>Race</b>					
African American/Black	0	3	1	2	<b>6</b>

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	3	7	3	3	16
Caucasian/White	258	795	357	260	1,670
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	1	0	1
Chinese	0	1	1	0	2
Filipino	0	1	0	0	1
Japanese	1	1	3	0	5
Hmong	0	0	0	0	0
Korean	0	0	1	0	1
Vietnamese	1	6	2	0	9
Other Pacific Islander	0	0	0	0	0
Other Asian	0	3	2	0	5
Two or More Race	0	2	2	0	4
Some Other race	7	13	9	7	36
Not Collected	96	382	226	119	823
<b>Gender</b>					
Female	211	740	361	235	1,547
Male	140	411	237	141	929
Not Collected	15	63	10	15	103
<b>Monthly Income</b>					
Less than 150% of FPL	103	243	155	100	601
Equal To/Greater than 150% of FPL	143	419	179	162	903
Not collected	120	552	274	129	1,075
<b>Client Asset Limits</b>					
Below LIS Asset limit	114	242	217	127	700
At or Above LIS Asset Limit	92	332	236	186	846
Not Collected	160	640	155	78	1,033

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

### 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	41	58	41	32	<b>172</b>
Limited English Proficient (LEP)	14	22	19	10	<b>65</b>
Dual Eligible	102	204	175	110	<b>591</b>
Medicare Status Due to Disability	66	212	152	86	<b>516</b>
Dual Eligible due to Mental Disability	21	52	44	19	<b>136</b>
Applying/Receiving Social Security/Medicare Disability	72	210	171	85	<b>538</b>
<b>Age</b>					
Under 60	35	140	106	59	<b>340</b>
60-64	33	80	55	75	<b>243</b>
65-74	176	492	238	139	<b>1,045</b>
75-84	47	285	87	53	<b>472</b>
85+	39	120	47	31	<b>237</b>
Not Collected	36	97	75	34	<b>242</b>
<b>Marital Status</b>					
Married	139	405	182	133	<b>859</b>
Never Married	24	99	39	32	<b>194</b>
Separated	4	18	11	5	<b>38</b>
Divorced	68	161	77	48	<b>354</b>
Widowed	47	181	75	50	<b>353</b>
Domestic Partner	4	1	0	1	<b>6</b>
Not Collected	80	349	224	122	<b>775</b>
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	62	98	74	68	<b>302</b>
Estimated Dollars Saved	\$185,911.73	\$184,565.14	\$253,688.79	\$413,017.90	<b>\$1,037,183.56</b>

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

## Program: PSA 3 - Passages - HICAP

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

	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	349	1,157	585	374	<b>2,465</b>
Benefit Comparisons/Explanation/Coverage Changes	322	1,073	560	364	<b>2,319</b>
Appeals/Grievances	13	2	5	6	<b>26</b>
Billings/Claims	82	91	65	66	<b>304</b>
Fraud/Abuse	80	89	74	108	<b>351</b>
Quality of Care	2	0	1	3	<b>6</b>
<b>LTC/LTCI</b>					
Enrollment/Eligibility Assistance	29	44	54	23	<b>150</b>
Billings/Claims	5	3	7	2	<b>17</b>
LTC Partnership	2	2	0	1	<b>5</b>
Appeal/Grievances	0	1	2	2	<b>5</b>
Fraud/Abuse	4	2	4	4	<b>14</b>
Other LTC	7	3	10	7	<b>27</b>
<b>Medigap/Supplement/SELECT</b>					
Enrollment/Eligibility/Screening	276	634	423	308	<b>1,641</b>
Benefit Explanation	210	486	332	254	<b>1,282</b>
Appeals/Grievances	5	2	2	3	<b>12</b>
Billings/Claims	55	70	59	47	<b>231</b>
Fraud/Abuse	18	21	26	35	<b>100</b>
Disenrollment/Coverage Changes	42	145	83	55	<b>325</b>
Quality of Care	2	4	2	3	<b>11</b>
Plan Comparison	144	314	169	175	<b>802</b>
Marketing/Sales Complaints/Issues	9	8	5	12	<b>34</b>
Plan Non Renewal	0	1	0	0	<b>1</b>
<b>Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)</b>					
Eligibility/Screening	173	490	293	165	<b>1,121</b>
Benefit Explanation	143	328	201	105	<b>777</b>
Appeals/Grievances	4	6	2	2	<b>14</b>
Billings/Claims	28	50	24	9	<b>111</b>
Fraud/Abuse	7	13	14	7	<b>41</b>
Coverage Changes/Disenrollment	38	118	68	19	<b>243</b>
Plan Non Renewal	3	111	73	3	<b>190</b>
Plan Comparison	89	198	92	34	<b>413</b>
Enrollment/Enrollment Assistance	8	12	4	0	<b>24</b>
Quality of Care	5	1	0	0	<b>6</b>
Marketing/Sales Complaints or Issues	7	8	2	2	<b>19</b>
<b>Medi-Cal</b>					
Medi-Cal Screening (SSI, Nursing Home)	168	809	372	318	<b>1,667</b>
Medi-Cal Application Assistance	10	17	4	6	<b>37</b>

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)	249	978	488	331	<b>2,046</b>
MSP Application Assistance	31	35	48	33	<b>147</b>
Medi-Cal/QMB Claims	17	8	15	12	<b>52</b>
Fraud/Abuse	2	3	4	8	<b>17</b>
Other	33	31	23	28	<b>115</b>
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	108	98	87	93	<b>386</b>
Military Benefits	54	50	31	29	<b>164</b>
COBRA	8	4	10	9	<b>31</b>
Mental Health Topics	26	30	17	3	<b>76</b>
Fraud/Abuse	9	7	2	7	<b>25</b>
Other Health Insurance	8	5	12	19	<b>44</b>
Other	19	17	16	35	<b>87</b>
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	323	1,130	553	356	<b>2,362</b>
Eligibility/Screening	308	1,138	515	350	<b>2,311</b>
Plan Comparison	220	1,009	357	232	<b>1,818</b>
Enrollment/Anrollment Assistance	117	538	144	65	<b>864</b>
Billings/Claims	51	127	84	58	<b>320</b>
Coverage Changes	160	816	264	130	<b>1,370</b>
Re-enrollment	13	17	6	0	<b>36</b>
Disenrollment	11	15	7	4	<b>37</b>
TROOP	4	5	4	4	<b>17</b>
Other	22	55	62	26	<b>165</b>
<b>LIS / Extra Help</b>					
Eligibility / Screening	252	947	512	341	<b>2,052</b>
Benefit Explanation	107	322	320	155	<b>904</b>
Application Assistance	26	56	52	20	<b>154</b>
Claims/Billings	28	70	52	38	<b>188</b>
Appeals / Grievances	3	3	1	1	<b>8</b>
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	58	69	59	73	<b>259</b>
PPARx	7	1	1	2	<b>11</b>
Military Drug Benefit	28	35	30	24	<b>117</b>
Manufacturer Program	6	2	3	1	<b>12</b>
Other	11	7	10	6	<b>34</b>
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	91	235	185	94	<b>605</b>
Lag Time	2	4	3	2	<b>11</b>
Multiple Enrollment	1	0	0	0	<b>1</b>
Poor Training of Agents	0	2	0	1	<b>3</b>
Poor Training of CSR	1	1	1	0	<b>3</b>

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	1	1	1	2	5
Marketing Fraud/Abuse	0	2	1	1	4
Agent fraud/abuse	0	1	1	0	2
Formulary problems/changes	24	30	22	5	81
Dosage problem	6	8	7	3	24
Data problems	1	5	2	3	11
Delay in medications	2	5	8	4	19
Incorrect Co-Pay/Can't Afford Co-Pay	2	2	5	2	11
Client reached donut hole	5	10	0	1	16
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	2	1	2	3	8
Quality of Care	0	1	0	0	1
Plan Non Renewal	1	3	5	0	9
<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

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

### Program: PSA 3 - Passages - HICAP

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

### Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	1	0	0	1	<b>2</b>
Part D Plan:	1	2	1	1	<b>5</b>
SMP:	1	1	0	0	<b>2</b>
Urgent Fax:	0	0	0	1	<b>1</b>
800 Medicare:	0	1	0	1	<b>2</b>
Other:	9	22	21	8	<b>60</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>12</b>	<b>26</b>	<b>22</b>	<b>12</b>	<b>72</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	2	0	0	2	<b>4</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	1	<b>1</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>5</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	29	36	39	32	<b>136</b>
Total duration of calls	3.21	16.16	16.52	4.50	<b>40.39</b>