

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	
Type of Activity					
Interactive Presentations to Public in Person					
Total Number of Events	13	11	11	14	49
Estimated Number of Attendees	520	376	323	455	1,674
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	8	2	4	16	30
Estimated Number of Attendees	1,500	500	325	4,320	6,645
Estimated Number of Persons Provided Enrollment Assistance	0	0	5	0	5
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	0	8	0	0	8
Estimated Number of Attendees	0	76	0	0	76
Estimated Number of Persons Received Any Enrollment Assistance	0	79	0	0	79
Enrollment Assistance with Medicare Programs(s)	0	23	0	0	23
Enrollment Assistance with Part D	0	56	0	0	56
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
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	1	1
Estimated Number of Attendees	0	0	0	900,000	900,000
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	0	6	4	1	11
Estimated Number of Targeted Persons Reached	0	777,000	251,030	3,000,000	4,028,030
Presenters					
HICAP Paid Staff					
Total Presenters	19	24	15	25	83
Total Hours for Length of Activities	291.35	85.30	56.50	105.40	538.55
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	3	10	2	15	30
Total Hours for Length of Activities	9.00	36.15	13.40	44.10	102.65
Other Presenters					
Total Presenters	3	1	0	9	13
Total Hours for Length of Activities	7.00	5.00	0.00	27.30	39.30
Area of Focus					
Dual Eligible with Mental Illness	4	2		2	
Employer Termination - COBRA	8	0	2	1	11
General HICAP Information	1	1	0	3	5
Grievances / Appeals - Plan Issues	20	14	18	30	82
Long-Term Care / Insurance	1	0	2	3	6
Low Income Subsidy (LIS) / Application Assistance	3	0	4	6	13
Medicare (Parts A & B)	5	5	9	17	36
Medicare Advantage (Part C)	20	12	13	24	69
Medicare Fraud / Abuse	19	20	14	20	73
Medicare Prescription Drug Coverage (Part D)	18	10	15	24	67
Medigap / Medicare Supplements	20	19	13	21	73
Non-Medicare Fraud/Abuse	20	13	13	21	67
Other Topics / Issues (Health Specific)	0	0	0	1	1
	1	0	1	0	2

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	1	0	1	0	2
Preventive Care Benefits	20	12	13	21	66
QMB/SLMB/QI	16	1	0	2	19
Volunteer Recruitment	3	2	6	14	25
Targeted Audience					
African American	13	9	15	23	60
American Indian or Nataive Alaskan	4	0	1	6	11
Asian Indian	0	0	1	14	15
Caucasian	18	22	18	30	88
Chinese	5	5	8	17	35
Disabled	16	19	12	26	73
Dual Eligible Groups	11	10	4	16	41
Employer Related Groups	2	1	1	3	7
Family Member/Caregiver of Beneficiary	10	14	11	28	63
Filipino	0	0	1	8	9
Guamanian or Chamorro	0	0	0	4	4
Hispanic / Latino	10	8	11	23	52
Hmong	2	0	1	6	9
Japanese	7	3	5	16	31
Korean	5	2	3	9	19
Low Income	14	19	6	17	56
Medicare Beneficiaries	17	23	14	27	81
Medicare Pre-Enrollees	15	10	16	25	66
Mental Health	9	2	1	6	18
Mental Health Professionals	4	2	6	14	26
Native Hawaiian	0	0	0	4	4
Other	0	0	0	1	1
Other Asian	4	0	0	4	8
Other Pacific Islander	0	0	0	1	1
Partnership Outreach	1	0	0	3	4
Presentations to Groups in Language Other than English	0	0	0	0	0
Rural	1	2	3	4	10
Samoan	0	0	1	4	5
Socail Work Professionals	3	2	7	14	26
Some Other Race or Ethnicity	4	0	0	3	7
Vietnamese	4	2	4	8	18

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	605	726	701	445	2,477
Literature from Events					
General HICAP Brochure	1,327	510	537	2,248	4,622
"Taking Care of Tomorrow"	0	20	25	65	110
Other Publications (Created by or on Behalf of Local HICAP)	645	240	332	1,373	2,590
Other Literature					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	1	0	2	3

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - HICAP Services of Northern California

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

Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	1,249	1,879	1,044	1,297	5,469
Total Finalized Intakes	224	538	422	607	1,791
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	89	140	98	158	485
Aging into Medicare Postacd - CDA HICAP	6	9	5	6	26
CDA HICAP	6	9	8	11	34
CHA	2	0	1	0	3
CMS/Medicare	9	27	31	61	128
Friend/Relative	22	53	47	90	212
InfoVan	0	0	0	1	1
Internet	4	8	4	11	27
Mailings	3	9	10	10	32
Media	15	33	51	36	135
Other	31	78	77	105	291
Presentations	5	17	8	15	45
Previous Contacts	13	82	67	88	250
State Website	0	0	0	1	1
Missing/Not Collected	19	73	15	14	121
Mode of Client Contact					
Quick Call Contacts	1,079	1,608	774	745	4,206
Contacts by Telephone	37	192	166	75	470
Contacts In Person at home	1	8	4	4	17
Contacts In Person at site	204	429	360	573	1,566
Contacts by E-Mail	20	17	28	10	75
Contacts by Mail/Fax	5	60	15	2	82
Total Number of Client Contacts:	1,346	2,314	1,347	1,409	6,416
Contact Status Types					
General info	131	219	241	254	845
Detailed Assistance	100	426	362	414	1,302
Problem Solving/Resolution	50	155	107	90	402
Total Counseling Time Spent by Counselor Type					
Program Manager	0.00	5.00	2.50	0.00	7.50
Volunteer	279.24	475.57	854.31	1,893.08	3,502.20
Paid	12.03	193.21	189.59	78.36	473.19
In-Kind	0.00	0.00	0.00	0.00	0.00
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	10	13	15	33	71
Race					
African American/Black	4	6	22	35	67

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	3	1	3	8
Caucasian/White	186	413	326	460	1,385
Native Hawaiian	0	0	1	0	1
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	5	1	4	10
Chinese	2	0	2	9	13
Filipino	0	2	5	3	10
Japanese	2	3	5	7	17
Hmong	0	0	0	0	0
Korean	0	0	0	1	1
Vietnamese	1	1	1	2	5
Other Pacific Islander	0	1	2	2	5
Other Asian	1	1	0	2	4
Two or More Race	1	1	1	6	9
Some Other race	5	7	7	12	31
Not Collected	21	95	48	61	225
Gender					
Female	138	337	229	375	1,079
Male	75	167	170	201	613
Not Collected	11	34	23	31	99
Monthly Income					
Less than 150% of FPL	43	84	87	120	334
Equal To/Greater than 150% of FPL	85	192	177	314	768
Not collected	96	262	158	173	689
Client Asset Limits					
Below LIS Asset limit	0	26	15	10	51
At or Above LIS Asset Limit	0	5	11	4	20
Not Collected	224	507	396	593	1,720

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

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Total Clients that Checked Yes as Being					
Veteran	15	25	38	40	118
Limited English Proficient (LEP)	4	2	8	10	24
Dual Eligible	25	56	61	63	205
Medicare Status Due to Disability	31	84	58	105	278
Dual Eligible due to Mental Disability	3	8	8	4	23
Applying/Receiving Social Security/Medicare Disability	41	83	82	136	342
Age					
Under 60	33	70	45	89	237
60-64	12	37	39	70	158
65-74	125	233	206	262	826
75-84	26	110	74	113	323
85+	18	55	38	50	161
Not Collected	10	33	20	23	86
Marital Status					
Married	80	160	161	190	591
Never Married	23	70	48	81	222
Separated	3	2	7	9	21
Divorced	45	99	85	130	359
Widowed	33	92	75	117	317
Domestic Partner	0	2	1	5	8
Not Collected	40	113	45	75	273
Estimated Financial Saving					
Clients with Financial Savings	16	42	20	18	96
Estimated Dollars Saved	\$44,591.66	\$58,730.80	\$53,305.08	\$37,721.36	\$194,348.90

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	102	246	160	151	659
Benefit Comparisons/Explanation/Coverage Changes	110	202	184	252	748
Appeals/Grievances	3	3	7	7	20
Billings/Claims	13	15	23	18	69
Fraud/Abuse	0	1	3	0	4
Quality of Care	0	2	2	3	7
LTC/LTCI					
Enrollment/Eligibility Assistance	10	4	3	12	29
Billings/Claims	5	1	1	3	10
LTC Partnership	1	0	2	2	5
Appeal/Grievances	1	0	0	0	1
Fraud/Abuse	0	0	0	0	0
Other LTC	7	4	7	6	24
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	76	182	128	159	545
Benefit Explanation	102	212	185	264	763
Appeals/Grievances	0	0	4	1	5
Billings/Claims	2	1	6	2	11
Fraud/Abuse	0	0	1	0	1
Disenrollment/Coverage Changes	2	4	5	6	17
Quality of Care	0	0	0	0	0
Plan Comparison	15	44	64	156	279
Marketing/Sales Complaints/Issues	0	0	1	0	1
Plan Non Renewal	0	4	5	1	10
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	73	160	118	156	507
Benefit Explanation	107	207	182	280	776
Appeals/Grievances	2	1	2	6	11
Billings/Claims	6	8	11	12	37
Fraud/Abuse	0	1	1	2	4
Coverage Changes/Disenrollment	5	24	11	16	56
Plan Non Renewal	0	53	28	38	119
Plan Comparison	14	52	53	138	257
Enrollment/Enrollment Assistance	6	26	14	20	66
Quality of Care	3	2	3	2	10
Marketing/Sales Complaints or Issues	0	0	0	1	1
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	8	25	11	3	47
Medi-Cal Application Assistance	4	10	10	11	35

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)	23	24	25	25	97
MSP Application Assistance	2	1	2	7	12
Medi-Cal/QMB Claims	1	2	2	1	6
Fraud/Abuse	0	1	0	0	1
Other	21	21	19	29	90
Other					
Employer/Federal Health Benefits (FEHB)	23	21	45	62	151
Military Benefits	8	10	16	22	56
COBRA	2	2	6	2	12
Mental Health Topics	2	4	0	2	8
Fraud/Abuse	1	1	0	0	2
Other Health Insurance	2	4	8	5	19
Other	7	7	14	11	39
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	119	280	193	265	857
Eligibility/Screening	69	186	119	116	490
Plan Comparison	42	198	102	215	557
Enrollment/Anrollment Assistance	14	86	18	39	157
Billings/Claims	7	8	6	5	26
Coverage Changes	9	29	17	25	80
Re-enrollment	1	1	3	0	5
Disenrollment	0	4	2	2	8
TROOP	1	2	1	5	9
Other	2	11	8	15	36
LIS / Extra Help					
Eligibility / Screening	34	123	87	42	286
Benefit Explanation	20	44	39	59	162
Application Assistance	3	89	67	44	203
Claims/Billings	0	2	0	2	4
Appeals / Grievances	0	2	0	1	3
Other Prescription Drug CoveragePlans					
Union/employer	13	10	17	22	62
PPARx	0	0	0	2	2
Military Drug Benefit	7	6	14	11	38
Manufacturer Program	0	1	0	2	3
Other	2	3	1	7	13
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	1	2	3	2	8
Lag Time	1	2	0	2	5
Multiple Enrollment	0	0	0	1	1
Poor Training of Agents	0	0	0	1	1
Poor Training of CSR	0	0	1	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	1	4	8	4	17
Dosage problem	0	0	0	0	0
Data problems	0	1	0	0	1
Delay in medications	0	0	0	0	0
Incorrect Co-Pay/Can't Afford Co-Pay	1	0	2	1	4
Client reached donut hole	3	4	3	5	15
SSA Premium withheld	0	1	0	0	1
Appeals/Grievances	1	0	1	0	2
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	1	1	2	4
HICAP Legal Services					
Referrals to HICAP Legal	1	0	3	2	6
Legal Clients Served	0	17	0	47	64
Cases Opened	18	24	20	18	80
Cases Closed	39	95	64	62	260
Favorable Closed Case Results	9	7	11	3	30
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	91	129	96	113	429
HICAP Legal Clients that Saved	2	3	36	38	79
Estimated Financial Savings	\$367.00	\$834.00	\$30,282.14	\$18,748.87	\$50,232.01

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 4 - 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	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	0	0	0	0	0
SMP:	1	0	0	0	1
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	1	2	1	4	8
TOTAL MEDICARE PART D COMPLAINTS	2	2	1	4	9
All Other Complaints					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
TOTAL ALL OTHER COMPLAINTS	0	0	0	0	0
800 Medicare Line Issues					
Total number of Calls with Issues	23	29	42	47	141
Total duration of calls	16.20	15.07	22.07	21.06	74.40