

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

## Program: PSA 15 - Kings-Tulare Area Agency on Aging HICAP

From: 07/01/2012 To: 06/30/2013

## Public and Media Data Report

Type of Activity	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	35	2	6	6	<b>49</b>
Estimated Number of Attendees	712	40,015	207	224	<b>41,158</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	7	3	1	3	<b>14</b>
Estimated Number of Attendees	915	550	65	1,589	<b>3,119</b>
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	<b>0</b>
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	1	0	0	<b>1</b>
Estimated Number of Attendees	0	250	0	0	<b>250</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	25	0	0	<b>25</b>
Estimated Number of Attendees	0	125	0	0	<b>125</b>
Estimated Number of Persons Received Any Enrollment Assistance	0	11	0	0	<b>11</b>
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	<b>0</b>
Enrollment Assistance with Part D	0	11	0	0	<b>11</b>
Enrollment Assistance with LIS	0	0	0	0	<b>0</b>
Enrollment Assistance MSP	0	0	0	0	<b>0</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	0	0	0	0	<b>0</b>
Estimated Number of Attendees	0	0	0	0	<b>0</b>
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	1	<b>1</b>
Estimated Number of Attendees	0	0	0	22,000	<b>22,000</b>
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	<b>0</b>
Estimated Number of Persons Reached	0	0	0	0	<b>0</b>

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<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	16	37	4	1	<b>58</b>
Estimated Number of Targeted Persons Reached	21,185	45,369	55,300	3,700	<b>125,554</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	52	61	8	9	<b>130</b>
Total Hours for Length of Activities	183.15	153.30	19.35	26.15	<b>381.95</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	15	12	5	4	<b>36</b>
Total Hours for Length of Activities	36.40	39.35	25.30	26.30	<b>127.35</b>
<b>Other Presenters</b>					
Total Presenters	2	30	3	4	<b>39</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	14	22		2	
Employer Termination - COBRA	14	9	0	0	<b>23</b>
General HICAP Information	0	1	0	0	<b>1</b>
Grievances / Appeals - Plan Issues	51	26	8	11	<b>96</b>
Long-Term Care / Insurance	2	0	0	0	<b>2</b>
Low Income Subsidy (LIS) / Application Assistance	2	1	0	1	<b>4</b>
Medicare (Parts A & B)	26	9	2	3	<b>40</b>
Medicare Advantage (Part C)	44	11	5	8	<b>68</b>
Medicare Prescription Drug Coverage (Part D)	31	12	7	7	<b>57</b>
Medigap / Medicare Supplements	26	18	8	8	<b>60</b>
Non-Medicare Fraud/Abuse	29	62	7	7	<b>105</b>
Other Topics / Issues (Health Specific)	23	9	1	3	<b>36</b>
	0	0	0	1	<b>1</b>
	0	3	1	1	<b>5</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	3	2	0	0	<b>5</b>
Preventive Care Benefits	3	4	0	2	<b>9</b>
QMB/SLMB/QI	33	14	3	8	<b>58</b>
Volunteer Recruitment	18	8	3	7	<b>36</b>
<b>Targeted Audience</b>					
African American	22	27	6	2	<b>57</b>
American Indian or Naitave Alaskan	4	1	4	2	<b>11</b>
Asian Indian	7	1	4	0	<b>12</b>
Caucasian	41	62	10	7	<b>120</b>
Chinese	4	0	4	1	<b>9</b>
Disabled	13	10	5	5	<b>33</b>
Dual Eligible Groups	10	4	5	4	<b>23</b>
Employer Related Groups	19	3	9	5	<b>36</b>
Family Member/Caregiver of Beneficiary	17	38	8	8	<b>71</b>
Filipino	12	8	6	3	<b>29</b>
Guamanian or Chamorro	4	0	4	0	<b>8</b>
Hispanic / Latino	44	59	10	7	<b>120</b>
Hmong	10	16	4	2	<b>32</b>
Japanese	4	0	5	2	<b>11</b>
Korean	5	0	4	1	<b>10</b>
Low Income	17	43	6	5	<b>71</b>
Medicare Beneficiaries	26	42	7	7	<b>82</b>
Medicare Pre-Enrollees	13	6	6	6	<b>31</b>
Mental Health	8	2	4	1	<b>15</b>
Mental Health Professionals	7	3	5	2	<b>17</b>
Native Hawaiian	4	0	4	0	<b>8</b>
Other	10	1	0	1	<b>12</b>
Other Asian	5	0	5	1	<b>11</b>
Other Pacific Islander	4	0	4	1	<b>9</b>
Partnership Outreach	3	34	2	2	<b>41</b>
Presentations to Groups in Language Other than English	4	3	2	1	<b>10</b>
Rural	35	41	5	6	<b>87</b>
Samoan	4	0	4	1	<b>9</b>
Socail Work Professionals	16	5	10	6	<b>37</b>
Some Other Race or Ethnicity	12	5	4	3	<b>24</b>
Vietnamese	5	1	4	1	<b>11</b>

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#### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	84	147	81	53	<b>365</b>
<b>Literature from Events</b>					
General HICAP Brochure	1,807	949	174	1,566	<b>4,496</b>
"Taking Care of Tomorrow"	5	0	0	0	<b>5</b>
Other Publications (Created by or on Behalf of Local HICAP)	21,857	1,934	3,780	1,314	<b>28,885</b>
<b>Other Literature</b>					
Other Literature	175	600	87	75	<b>937</b>
Brochures from Quick Call	2	6	8	4	<b>20</b>

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

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From: 07/01/2012 To: 06/30/2013

## Client Contacts &amp; Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	499	891	525	410	<b>2,325</b>
Total Finalized Intakes	250	541	190	175	<b>1,156</b>
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	177	309	132	127	<b>745</b>
Aging into Medicare Postacd - CDA HICAP	4	4	2	0	<b>10</b>
CDA HICAP	2	8	2	1	<b>13</b>
CHA	1	0	1	0	<b>2</b>
CMS/Medicare	3	2	2	1	<b>8</b>
Friend/Relative	7	14	6	13	<b>40</b>
InfoVan	0	0	0	0	<b>0</b>
Internet	0	0	0	0	<b>0</b>
Mailings	0	9	2	1	<b>12</b>
Media	1	14	1	1	<b>17</b>
Other	24	29	8	12	<b>73</b>
Presentations	3	13	4	3	<b>23</b>
Previous Contacts	26	135	29	11	<b>201</b>
State Website	0	0	0	0	<b>0</b>
Missing/Not Collected	2	4	1	5	<b>12</b>
<b>Mode of Client Contact</b>					
Quick Call Contacts	626	1,245	806	532	<b>3,209</b>
Contacts by Telephone	306	334	255	206	<b>1,101</b>
Contacts In Person at home	25	55	70	44	<b>194</b>
Contacts In Person at site	161	585	253	355	<b>1,354</b>
Contacts by E-Mail	29	25	39	55	<b>148</b>
Contacts by Mail/Fax	38	77	40	6	<b>161</b>
Contacts by Other	665	1,921	412	312	<b>3,310</b>
<b>Total Number of Client Contacts:</b>	<b>1,850</b>	<b>4,242</b>	<b>1,875</b>	<b>1,510</b>	<b>9,477</b>
<b>Contact Status Types</b>					
General info	85	150	99	103	<b>437</b>
Detailed Assistance	1,100	2,786	905	784	<b>5,575</b>
Problem Solving/Resolution	36	52	65	91	<b>244</b>
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	28.50	61.25	90.35	70.30	<b>250.40</b>
Volunteer	101.45	223.25	145.10	132.15	<b>601.95</b>
Paid	384.25	922.25	202.00	201.02	<b>1,709.52</b>
In-Kind	2.45	57.15	16.00	2.30	<b>77.90</b>
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	93	176	76	46	<b>391</b>
<b>Race</b>					

From: 07/01/2012 To: 06/30/2013

### Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
African American/Black	6	10	1	2	19
American Indian/Alaskan Native	2	1	0	0	3
Caucasian/White	101	248	85	74	508
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	4	0	0	4
Chinese	0	0	1	2	3
Filipino	1	12	2	4	19
Japanese	1	1	1	0	3
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	0	1	0	2	3
Other Pacific Islander	4	6	3	2	15
Other Asian	0	4	0	0	4
Two or More Race	5	2	3	0	10
Some Other race	97	169	76	51	393
Not Collected	33	83	18	38	172
<b>Gender</b>					
Female	144	320	106	97	667
Male	104	220	80	77	481
Not Collected	2	1	4	1	8
<b>Monthly Income</b>					
Less than 150% of FPL	129	264	110	70	573
Equal To/Greater than 150% of FPL	116	267	72	88	543
Not collected	5	10	8	17	40
<b>Client Asset Limits</b>					
Below LIS Asset limit	131	265	112	78	586
At or Above LIS Asset Limit	114	267	59	73	513
Not Collected	5	9	19	24	57

From: 07/01/2012 To: 06/30/2013

### 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	5	22	4	1	<b>32</b>
Limited English Proficient (LEP)	26	67	33	28	<b>154</b>
Dual Eligible	168	260	84	57	<b>569</b>
Medicare Status Due to Disability	33	75	23	23	<b>154</b>
Dual Eligible due to Mental Disability	2	6	1	0	<b>9</b>
Applying/Receiving Social Security/Medicare Disability	30	67	38	38	<b>173</b>
<b>Age</b>					
Under 60	35	60	32	25	<b>152</b>
60-64	25	49	21	22	<b>117</b>
65-74	111	264	77	83	<b>535</b>
75-84	49	127	42	36	<b>254</b>
85+	19	30	13	8	<b>70</b>
Not Collected	11	11	5	1	<b>28</b>
<b>Marital Status</b>					
Married	106	244	70	79	<b>499</b>
Never Married	17	45	15	2	<b>79</b>
Separated	5	4	5	4	<b>18</b>
Divorced	20	64	28	17	<b>129</b>
Widowed	55	95	39	24	<b>213</b>
Domestic Partner	0	3	1	1	<b>5</b>
Not Collected	47	86	32	48	<b>213</b>
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	74	150	50	50	<b>324</b>
Estimated Dollars Saved	\$482,542.11	\$303,246.24	\$132,398.40	\$231,381.89	<b>\$1,149,568.64</b>

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
<b>Medicare Parts A&amp;B (Original Medicare)</b>					
Enrollment/Eligibility/Screening	202	470	130	116	<b>918</b>
Benefit Comparisons/Explanation/Coverage Changes	199	419	96	106	<b>820</b>
Appeals/Grievances	6	7	3	7	<b>23</b>
Billings/Claims	24	90	22	13	<b>149</b>
Fraud/Abuse	71	327	64	76	<b>538</b>
Quality of Care	2	3	2	3	<b>10</b>
<b>LTC/LTCI</b>					
Enrollment/Eligibility Assistance	4	4	1	1	<b>10</b>
Billings/Claims	0	1	1	0	<b>2</b>
LTC Partnership	0	0	0	0	<b>0</b>
Appeal/Grievances	0	0	0	1	<b>1</b>
Fraud/Abuse	1	0	0	1	<b>2</b>
Other LTC	1	1	0	0	<b>2</b>
<b>Medigap/Supplement/SELECT</b>					
Enrollment/Eligibility/Screening	173	405	103	72	<b>753</b>
Benefit Explanation	186	411	87	82	<b>766</b>
Appeals/Grievances	0	1	0	3	<b>4</b>
Billings/Claims	4	36	7	6	<b>53</b>
Fraud/Abuse	8	112	22	40	<b>182</b>
Disenrollment/Coverage Changes	3	10	2	1	<b>16</b>
Quality of Care	0	2	0	0	<b>2</b>
Plan Comparison	90	246	32	36	<b>404</b>
Marketing/Sales Complaints/Issues	0	0	0	0	<b>0</b>
Plan Non Renewal	0	1	0	0	<b>1</b>
<b>Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)</b>					
Eligibility/Screening	153	389	71	56	<b>669</b>
Benefit Explanation	164	398	51	63	<b>676</b>
Appeals/Grievances	1	1	2	2	<b>6</b>
Billings/Claims	11	25	6	5	<b>47</b>
Fraud/Abuse	6	98	10	33	<b>147</b>
Coverage Changes/Disenrollment	12	16	6	11	<b>45</b>
Plan Non Renewal	1	1	0	0	<b>2</b>
Plan Comparison	68	256	18	25	<b>367</b>
Enrollment/Enrollment Assistance	6	12	2	4	<b>24</b>
Quality of Care	1	1	1	0	<b>3</b>
Marketing/Sales Complaints or Issues	0	0	1	1	<b>2</b>
<b>Medi-Cal</b>					
Medi-Cal Screening (SSI, Nursing Home)	9	7	10	6	<b>32</b>
Medi-Cal Application Assistance	20	27	29	20	<b>96</b>

From: 07/01/2012 To: 06/30/2013

### Topics/Needs Discussed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
MSP Screening (QMB, SLMB, Q-1)	173	308	80	34	<b>595</b>
MSP Application Assistance	30	62	21	11	<b>124</b>
Medi-Cal/QMB Claims	1	5	2	1	<b>9</b>
Fraud/Abuse	1	47	20	9	<b>77</b>
Other	27	42	32	29	<b>130</b>
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	49	47	23	30	<b>149</b>
Military Benefits	6	8	1	0	<b>15</b>
COBRA	5	3	0	3	<b>11</b>
Mental Health Topics	3	0	0	1	<b>4</b>
Fraud/Abuse	2	0	11	16	<b>29</b>
Other Health Insurance	9	12	4	5	<b>30</b>
CHA Fact Sheets	0	4	4	9	<b>17</b>
Other	18	17	35	21	<b>91</b>
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	198	475	132	101	<b>906</b>
Eligibility/Screening	191	460	119	90	<b>860</b>
Plan Comparison	96	326	63	76	<b>561</b>
Enrollment/Anrollment Assistance	78	298	64	70	<b>510</b>
Billings/Claims	11	42	6	2	<b>61</b>
Coverage Changes	12	65	7	3	<b>87</b>
Re-enrollment	1	2	0	1	<b>4</b>
Disenrollment	9	22	4	1	<b>36</b>
TROOP	2	1	0	1	<b>4</b>
Other	4	14	12	5	<b>35</b>
<b>LIS / Extra Help</b>					
Eligibility / Screening	235	504	152	119	<b>1,010</b>
Benefit Explanation	165	409	101	78	<b>753</b>
Application Assistance	27	54	18	14	<b>113</b>
Claims/Billings	4	14	4	2	<b>24</b>
Appeals / Grievances	0	1	0	0	<b>1</b>
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	28	33	15	23	<b>99</b>
PPARx	1	1	2	0	<b>4</b>
Military Drug Benefit	5	6	1	0	<b>12</b>
Manufacturer Program	1	0	0	0	<b>1</b>
Other	2	12	7	3	<b>24</b>
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	2	4	3	1	<b>10</b>
Lag Time	0	1	0	0	<b>1</b>
Multiple Enrollment	1	1	1	0	<b>3</b>
Poor Training of Agents	0	0	0	0	<b>0</b>

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**Topics/Needs Discussed**

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Poor Training of CSR	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	1	0	0	1
Formulary problems/changes	0	2	2	2	6
Dosage problem	0	1	0	0	1
Data problems	0	1	2	0	3
Delay in medications	0	0	1	0	1
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	3	0	3
Client reached donut hole	1	0	2	0	3
SSA Premium withheld	1	1	0	0	2
Appeals/Grievances	1	1	1	0	3
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	1	0	1
<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

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### Complaints Filed

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
Part D Plan:	0	0	3	0	<b>3</b>
SMP:	1	0	0	0	<b>1</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	0	0	<b>0</b>
Other:	2	7	11	1	<b>21</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>3</b>	<b>7</b>	<b>14</b>	<b>1</b>	<b>25</b>
<b>All Other Complaints</b>					
APS :	0	0	2	0	<b>2</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	1	0	<b>1</b>
SMP:	0	0	1	0	<b>1</b>
Other:	0	0	1	0	<b>1</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>	<b>5</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	5	12	5	6	<b>28</b>
Total duration of calls	1.45	2.45	1.30	2.24	<b>7.44</b>