

STATE OF CALIFORNIA
 CALIFORNIA DEPARTMENT OF AGING
CALIFORNIA LEGAL SERVICES QUARTERLY AGGREGATE REPORT
 CDA 1022 (REV 07/2018)



Section 1: Legal Service Provider (LSP) Information

Reporting LSP Name		Legal Provider County(ies) Served
Quarterly Reporting Period		Date Submitted to AAA
LSP Contact Name		LSP Telephone
LSP Contact E-Mail		

Section 2: Area Agency on Aging (AAA) Information

Reporting AAA Name		AAA Person Name Validating Report
PSA/AAA Number	Date Submitted to CDA	AAA Contact Telephone
AAA Contact E-Mail		

Section 3: Summary Totals for the Quarter

Total Unduplicated Client Count for Quarter	
Total Cases Closed in Quarter	
Total Units of Service for Quarter (Unit = 1 Hour)	

Section 4: Client Characteristics for Unduplicated Clients in Cases Opened This Quarter

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Section 4: Client Characteristics for Unduplicated Clients in Cases Opened This Quarter (Cont.)

Other Client Characteristics	Total
Frail/Disabled	
Homebound	
Lives Alone	
Institutionalized	
Suspected Victim of Elder Abuse/Exploitation	
Limited English	
Rural	
Greatest Economic Need (Minority)	
Greatest Economic Need (Non-Minority)	
Greatest Economic Need (Minority Status Unknown)	

Client Ethnicity	Total
Hispanic/Latino <i>(This is a separate category from Race)</i>	

Client Race <i>(Each Unduplicated Client is to be reported in only one race category)</i>	Total
Two or More Races	
Caucasian	
African American	
Native American/Native Alaskan	
Asian/Pacific Islander <i>(breakdown is to comply with California Government Code 8310.5)</i>	
Asian Indian	
Cambodian	
Chinese	
Filipino	
Japanese	
Korean	
Laotian	
Vietnamese	
Guamanian	
Hawaiian	
Samoan	
Other Asian/Pacific Islander	
Race Unknown/Some Other Race	
Client Declined to Provide Information	
TOTAL (=Unduplicated Client Count for Quarter)	



Section 5: Case Information <i>(Include All Cases Regardless of Whether Clients are Duplicated or Unduplicated)</i>				
Section 5.1 Cases Opened in Quarter <i>(Total Cases Opened by Legal Problem Code)</i>		Section 5.2 Cases Closed in Quarter <i>(Total Cases Closed by Case Closing Code & Legal Problem Code)</i>		
Legal Problem Code	Total	Case Closing Codes – Level of Service <i>(Report only one code per case closed)</i>		
		Counsel and Advice (CA)	Limited Additional Services (LAS)	Legal Representation (LR)
A. Consumer/Finance				
A1. Bankruptcy/Debt Collection				
A2. Contracts/Warranties				
A3. Other Consumer/Finance				
B. Employment				
B1. Discrimination				
B2. Other Employment				
C. Family				
C1. Divorce/Custody/Visitation/Support/ Grandparents Rights				
C2. Conservatorship				
C3. Other Family				
D. Health/Community Based Care				
D1. Medi-Cal/Medicaid				
D2. Medicare				
D3. Other Health/Community Based Care				
E. Housing				
E1. Landlord-Tenant (Subsidized or Private Housing)				
E2. Real Property: Home Loans/Foreclosure/ Reverse Mortgage				
E3. Other Housing				
F. Income Maintenance				
F1. Social Security				
F2. Supplemental Security Income (SSI)				
F3. Pensions/Retire Benefits				
F4. Other Income Maintenance				
G. Individual Rights				
G1. Immigration/Naturalization				
G2. Elder Abuse/Neglect/Exploitation				
G3. Other Individual Rights				



Section 5: Case Information (Cont.) <i>(Include All Cases Regardless of Whether Clients are Duplicated or Unduplicated)</i>			
Section 5.1 Cases Opened in Quarter <i>(Total Cases Opened by Legal Problem Code)</i>		Section 5.2 Cases Closed in Quarter <i>(Total Cases Closed by Case Closing Code & Legal Problem Code)</i>	
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Legal Problem Code	Total	Counsel and Advice (CA)	Limited Additional Services (LAS)
			Legal Representation (LR)
H. Miscellaneous			
H1. Estate Planning/ Wills/Trusts			
H2. Advance Health Care Directives (AHCD)			
H3. Financial Powers of Attorney			
H4. Other Miscellaneous			
TOTAL CASES OPENED IN QUARTER		TOTAL CASES CLOSED IN QUARTER BY CASE CLOSED CODE	
		Total Counsel and Advice	Total Limited Add. Services
			Total Legal Representation
TOTAL ESTIMATED CASE WORK HOURS SPENT (Include preparation time)			



Section 6.1: Outreach/Community Education Activities Data *(Attach Sheets as Needed)*

Information on Special Outreach Activities

Date	Location (If Applicable)	Type of Outreach Activity	Groups Targeted by Outreach	Est # of People Reached	Est. Hours (Including Prep, Travel, Presenting)
Total # of Special Outreach Activities in the Quarter					
Total Estimated # of Special Outreach Activity Hours in the Quarter					

Section 6.2 Outreach/Community Education Activities Data (Cont.) *(Attach Sheets as Needed)*

Information on Community Legal Education Programs/Activities

Date	Location (If Applicable)	Topic	Targeted Audience	Est # of Partici- pants	Est. Hours (Including Prep, Travel, Presenting)
Total # of Community Legal Education Programs in the Quarter					
Total Estimated # of Community Legal Education Hours in the Quarter					



Section 7: Optional Narratives *(Use Additional Paper if Needed)*

Section 7.1: Optional Success Story(ies)/Case Summary(ies)

Provide brief narrative(s) of notable case(s) and/or achievement(s). Remember to **exclude** any client identifying information.

Section 7.2: Optional Information on Collaboration with Other Advocacy Groups

Briefly describe activities relating to your partnerships, collaboration and networking with other elder rights advocacy groups (e.g., LTC, Ombudsman, HICAP, APS, AAA, or other State organizations).