



PROGRAM SPECIFICATIONS and STANDARDS

HEALTH COUNSELING AND ADVOCACY PROGRAM (HICAP)

February 10, 2017

INTRODUCTION

The Health Insurance Counseling and Advocacy Program (HICAP) was established in 1984 by State legislation (Welfare and Institutions Code, Section 9750-9756, Chapter 1464, Statutes of 1984; AB 2419). The law required the provision of public education, informal advocacy and counseling, and legal representation for as many Medicare beneficiaries as possible, in regard to private health insurance and Medicare issues.

In 1996 legislation, AB 2800--Chapter 1097, known as the Mello--Granlund Older Californians Act, replaced the former codes with updated statutes - Welfare and Institutions Code, Section 9541. The legislature, in adopting this law, declared that "...the purpose of the Health Insurance Counseling and Advocacy Program is to provide Medicare beneficiaries and those imminent of becoming eligible for Medicare with counseling and advocacy as to Medicare, private health insurance, and related health care coverage plans, on a statewide basis."

The passage of the Medicare Modernization Act (MMA) of 2003 introduced Medicare Part D, a new prescription drug benefit that became available to Medicare beneficiaries in 2006. The Medicare Improvements for Patients and Providers Act of 2008 (MIPPA) made a number of changes to the Medicare Advantage (MA) and Medicare Prescription drug benefit programs Part D.

Since its establishment in 1984, HICAP has grown along with the industries involved with health insurance and managed health care. HICAP now must cover a broad range of complex issues involving governmental and private insurance rules and regulations affecting seniors. This requires continual sophisticated training and updating of HICAP Staff and Counselors.

This HICAP Program is one of a number of projects statewide. The HICAP Program serves three area agencies on aging and a total of nine counties.

The HICAP Program is governed by federal guidelines, State law and regulation, and by Program Manuals issued and periodically updated by the California Department of Aging and disseminated by the Agency on Aging/Area 4. Federal guidelines emanate from the annual grant renewal process of the Centers for Medicare and Medicaid Services (CMS).

**AGENCY ON AGING \ AREA 4
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Agency on Aging\Area 4 is the responsible party for the administrative oversight of the HICAP Program and the HICAP contract. A HICAP Coordinating Committee made up of representatives of the three AAA's meets quarterly to monitor HICAP activities. Key HICAP staff persons attend these meetings and provide program updates and respond to any questions or concerns of any of the three AAA's.

PURPOSE

To provide Medicare beneficiaries and those imminent of becoming eligible for Medicare with counseling and advocacy services to address their questions, concerns and information regarding Medicare issues in the nine county area served by PSA 4, 11 and 29 area agencies on aging.

SERVICE PLAN

Management and Staffing; Service Referrals; Service Availability

The Health Insurance Counseling and Advocacy Program (HICAP) provider shall:

- 1) Provide education services to the public, counseling services to Medicare beneficiaries and those imminent of Medicare status, and legal representation to Medicare beneficiaries when warranted.
- 2) Educate and inform Older Californians about Medicare, long-term care, public and private health care benefits and financing, health insurance, and managed care.
- 3) Serve as a source of impartial educational information on health insurance and related plans, and act as an advocate for individual rights.
- 4) Service as many Medicare beneficiaries in the service jurisdiction as possible.
- 5) Recruit and maintain a strong, well-trained, cadre of volunteer and staff Registered HICAP Counselors.
- 6) Cooperate with Information and Assistance programs, services for the elderly, and other community services to ensure an integrated referral system for HICAP clients.
- 7) Provide legal representation when warranted, or provide for referral to legal assistance.
- 8) Ensure that HICAP clients who are contemplating managed care are fully informed of their rights and responsibilities, plan benefits, and limitations, and Medicare supplement options.
- 9) Conduct annual Open Enrollment activities regarding Medicare options including information on Medicare Part D prescription drug plans.
- 10) Reach out to underserved and hard-to-serve populations so that they may take full advantage of HICAP's no-fee service.
- 11) Assist low income Medicare beneficiaries to access key benefits that make Medicare affordable such as the Part D low income subsidy (LIS/Extra Help) and the Medicare Savings Program (MSPs); and help rural residents enroll in Part D.
- 12) Participate in as many community events and information outlets as possible where HICAP services can be introduced to the interested public and Older Californians.

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Data Collection and Program Reporting Requirements

The HICAP Program will collect and input data in accordance with the Statewide HICAP Automated Reporting System (SHARP), which is overseen by the California Department of Aging. In addition, the program will report monthly to AAA4 to track attainment of the contracted scope of service.

SERVICE PARAMETERS

Service Category

(a) **Persons COUNSELED:** Counseling of individuals who contact HICAP and request and receive one-on-one counseling from trained and registered HICAP counselors, either in person or over the telephone.

Unit: One person

(b) **Registered Counselors:** Training and registration of HICAP Counselors according to the California Department of Aging HICAP Program Manual and Training Guidelines.

Unit: One Registered HICAP Counselor

(c) **Community Presentations:** Community education sessions present HICAP information to an audience to increase their knowledge of Medicare issues. Presentations can include forums, lectures, speeches, panels, seminars and scheduled presentations in collaboration with other organizations. Community presentations also include print, radio, television and electronic media.

Unit: One presentation

(d) **Persons Reached Through Community Presentations:**

A count of the number of persons attending each community presentation or through media.

Unit: One attendee

(e) **Legal Clients Served:** A count of the number of persons who receive legal services.

Unit: One Client served

(f) **Legal Consultation Hours:** A count of the number of Legal consultation hours.

Unit: One Legal Consultation Hour

Minimum Scope of Service Performance

The applicant must meet minimum scope of service performance levels for each area agency on aging planning and service area (PSA) to be served by the HICAP program for the initial contract period from July 1, 2017 through June 30, 2018. Applicant must state the proposed performance levels for each PSA in the application narrative.

The minimum scope of service performance levels for each of the area agencies on aging are currently as follows:

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PSA 4 Agency on Aging\Area 4 serving the counties of Sacramento, Placer, Yolo, Nevada, Sierra, Sutter and Yuba.

Persons Counseled = 2,612

Registered Counselors = 40

Community Presentations = 87

Persons reached through Community Presentations = 17,844

Legal Clients Served = 200

Legal Consultation Hours = 150

PSA 11 San Joaquin Department of Aging and Community Services serving the county of San Joaquin.

Persons Counseled = 289

Registered Counselors = 5

Community Presentations = 26

Persons reached through Community Presentations = 4,886

Legal Clients Served = 35

Legal Consultation Hours = 35

PSA 29 El Dorado County Area Agency on Aging serving the county of El Dorado.

Persons Counseled = 614

Registered Counselors = 4

Community Presentations = 15

Persons reached through Community Presentations = 1,364

Legal Clients Served = 6

Legal Consultation Hours = 12

Client Eligibility

The HICAP Program will serve:

- (a) Medicare beneficiaries in the 3 AAA service areas
- (b) Persons about to become eligible for Medicare benefits
- (c) The children or other representatives of Medicare beneficiaries
- (d) Older persons planning the purchase of health insurance
- (e) Persons interested in coverage of future health related costs such as Long Term Care insurance

ADDITIONAL REQUIREMENTS

Geographic Service Area

The funded program will serve the following area agencies on aging covering nine counties:

- Agency on Aging \ Area 4 counties: serving Nevada, Placer, Sacramento, Sierra, Sutter, Yolo and Yuba counties.
- San Joaquin Department of Aging and Community Services PSA 11: serving San Joaquin County.

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- El Dorado Area Agency on Aging PSA 29: serving El Dorado County.