

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2012-2013

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Lassen, Modoc, Siskiyou, Trinity

Optional Success
Story(ies)/Case Summary(ies)

No Statements

Optional Information on
Collaboration with Other
Advocacy Groups

No Statements

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

Optional Success
Story(ies)/Case Summary(ies)

No Statement

Optional Information on
Collaboration with Other
Advocacy Groups

No Statement

PSA: 4

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Fiscal Year: 2012-2013

Quarter: 1

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba Counties

Optional Success
Story(ies)/Case Summary(ies)

None Reported

Optional Information on
Collaboration with Other
Advocacy Groups

None Reported

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Quarter: 1

Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

The client, a 72 year old extremely low income woman who was just moved to a skilled nursing facility due to declining health, was assessed an overpayment by Medicare in an amount over \$6,000. The client had been injured in an automobile accident and received a settlement payment that she used partly to cover her medical expenses from the accident. Medicare claimed all of her medical care from the same health care provider should have been paid by the settlement funds even though many of her medical visits were unrelated to the injuries she sustained in the automobile accident. The client contacted LSNC and we submitted an appeal and request for waiver of the overpayment on the client's behalf. Medicare granted the request and reduced the overpayment to approximately \$800, which the client paid.

The client owned a vehicle that was stolen from the client three years ago. She filed a police report after the incident but the vehicle was not recovered. She had a significant loan balance still owing on the vehicle at the time it was taken from her. The lender sought to recover the loan balance from her. She is on a fixed income from Social Security and sought assistance from LSNC when the lender sent her to collections. LSNC was able to file a claim with the client's insurance company, which covered most of the loan balance, and worked out a small lump sum payment for the remaining balance.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff held office hours at the following locations: Rural Innovations in social Economics (RISE), a non-profit agency serving low income persons in Esparto, on the 1st Thursday of the month; the West Sacramento Senior Center on the 2nd Thursday of the month and the former West Sacramento Senior Center on the 4th Thursday of the month; and the Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month. LSNC also added office hours at the Broderick Christian Center in West Sacramento on the 1st and 3rd Thursdays of the month, targeting the Russian community, homeless individuals and older adults at risk of homelessness. In Addition , LSNC attends monthly meetings of the Multi-Disciplinary team with APS, DESS, and other advocates for older adults.

LSNC also participates in regular meetings of the Yolo County Health Aging Alliance (YHAA) and the YHAA collaboration Subcommittee with other Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Employment and Social Services,, Veteran's Services, and representatives from the three Senior Centers.

Legal Representation: 15.20
Legal Advice/Assistance:166.15
Community Education: 5.50
Special Outreach: 0.00
Total Hours:186.85

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Fiscal Year: 2012-2013

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
Story(ies)/Case Summary(ies)

During this past quarter, experienced Senior Legal Hotline advocates provided quality, legal advice and assistance to Sacramento county seniors. As noted in our monthly reports, many of these clients were low income or very low income seniors living alone. Here is a sample of just a few (4) of our cases:

A very low income 65 year old senior called Senior Legal Hotline after being threatened jail time by a creditor. The creditor had informed the client that the client would have to serve time in jail if the client failed to make a large payment to the creditor. Senior Legal Hotline advised the senior that the creditor's statements were without merit and, moreover, violated the law. After being informed of her rights, the senior felt empowered and able to assert her rights against the illegal allegations.

A very low income 61 year old contacted Senior Legal Hotline after his wife of 30 years passed away. Upon his wife's death, a family member illegally obtained possession of property that the deceased spouse had left for the client. Senior Legal Hotline advised the client of his rights and provided the client with the specific form, and the information that the client should include on the form, that the client needed to fill out in order to acquire proper title to the property.

A 62 year old senior, and primary caretaker for her severely disabled adult daughter, called Senior Legal Hotline after she received a Notice of Action from Sacramento County informing her that their IHSS hours were going to be reduced by almost 40%. The Notice stated that the reduction would be retroactive to the previous month. Senior Legal Hotline immediately reviewed the Notices for legal deficiencies, initiated representation of the client before the County and informed the County that its actions were in violation of law. Senior Legal Hotline successfully obtained a rescission of the Notices with retroactive reinstatement of the client's original IHSS hours. Due to Senior Legal Hotline's representation, the client now has the sufficient number of hours to provide caretaker services for her severely disabled adult daughter.

A very low income 84 year old senior, living alone and subsiding on an annual income of less than \$8,000, was sued by a credit card company and her bank account was levied. Senior Legal Hotline advised the client of her legal rights, including the fact that the income in her bank account was protected against levy under a California law. Senior Legal Hotline then advised the client of the steps she would take to enforce her right to protect the bank account, provided the client with the necessary forms and walked the client through the process. In addition, Senior Legal Hotline conducted a benefits analysis for the client, advised the client of the public benefits which she may qualify for given her extremely low income and directed the client to the specific County offices where she would need to go to apply for the benefits. Due to Senior Legal Hotline's assistance, the client will be able to access the funds in her bank account and will be able to increase her financial security.

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Optional Information on Collaboration with Other Advocacy Groups

During this reporting period, Senior Legal Hotline conducted 15 community legal education activities; partnered with the LSNC-Health office to provide timely information to seniors about how the Affordable Care Act may impact their health care; collaborated with HUD low-income subsidized housing complexes to provide community legal education presentations targeted to retired, low-income, isolated and disabled seniors; partnered with the California Department of Aging and the Legal Aid Association of California (LAAC) on a federal Model Approaches grant to meet the legal needs of more seniors across California, target the most needy among the state's huge diverse population and reduce the serious disparities in the existing availability of legal help; served as a leader to develop a resource sharing site so that senior legal aid advocates across the state can decrease the time they spend creating resources (fact sheets, forms, etc.) and increase the time they spend on direct client services; took steps to initiate a project with Meals on Wheels (Asian Community Center) to distribute SLH flyers to seniors receiving nutritional assistance; met with the assistant director for the public service department of Sacramento County Public Law Library to discuss our services and updated the Law Library's referral booklet to better reflect SLH's services and increase referrals to SLH; worked with contacts at AARP in the CalFresh division to reach out to seniors in need of legal assistance with public benefits; targeted outreach to My Sister's House to provide legal services to Asian and Pacific Islander seniors impacted by domestic violence; and held two office hour sessions per month at senior centers (Rancho Cordova Senior Center and the Hart Center) to allow seniors to meet with SLH advocates in person.

Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

Optional Success Story(ies)/Case Summary(ies)

No Statements

Optional Information on Collaboration with Other Advocacy Groups

July 2012

- Telephone conference call with LAAC Senior Service Providers in California regarding new online resources through LAAC.
- Telephone conference call with Placer Clerk Recorders staff regarding services for seniors seeking information on deed changes.
- Attended the A4AA sponsored Townhall in Loomis, CA
- Attended the A4AA sponsored Townhall in Nevada City, CA
- Met with Roseville Home Start at their facilities in Roseville to tour the grounds and discuss services available to eligible seniors.

August 2012
None.

September 2012
None.

PSA: 5

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Provider: Legal Aid of the North Bay

Counties: Marin County

Optional Success
Story(ies)/Case Summary(ies)

<p>AUGUST 08E-1100924 Client is a 73 year old woman who signed a contract with Life Alert for monitoring of her home for fire & medical care monitoring. She was solicited for months before signing up with Life Alert in November, 2007. In July, 2008, client wanted to cancel the Life Alert service & after she phoned the company, she was told she was committed to paying the monthly charge for 3 years. After that conversation, client came to LAM. Patrick and I assisted client by preparing a demand letter for her signature. Client edited the letter we prepared & mailed it to Life Alert. Just last Friday, 8/15/08, she heard back from Life Alert & it agreed to cancel her service & charge her only 6 months' monthly charges, instead of three years' charges. Client called to thank LAM for its efforts assisting her to unwind the Life Alert contract.</p> <p>SEPTEMBER LAM investigated possible fraud by Dr. Jonathan Hyslop of Corte Madera and GE Credit. Our client a 80 year old senior, was asked to sign a credit application with GE Credit in order to receive medical series by Dr. Hyslop, a chiropractor. Our client stopped treatment shortly after starting because he felt that treatment was making him feel worse. However, he continued to receive payment requests from GE Credit. We believe Dr. Hyslop was paid up front for services he did not provide. In November 2011, LAM sent the doctor and GE Credit a demand letter. We also sent various follow up letters to GE Credit to cancel our client's credit. We also sent a complaint to the Board of Chiropractic Examiners regarding Dr. Hyslop's practice. On January 18, 2012, GE Credit cancelled our client's credit and informed him that his balance was zero. On Feb. 3, 2012 we received a response from the Board of Chiropractic Examiners informing us that the Board found evidence to support a violation of their regulations.</p>

Optional Information on
Collaboration with Other
Advocacy Groups

None reported.

PSA: 6

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client has been married to her husband for 36 years. She came to this county as a young bride. They had very little money but they were able to raise 3 children. Both of them worked but the main breadwinner was her husband. Unlike his wife who only spoke Cantonese, he spoke English and held down 2 jobs. When her husband died at age 6, our Client was devastated. Not only was her life partner gone, her main source of income was gone as well. She was brought to our office for assistance.

We assisted in helping her obtain survivor's social security. In addition we learned that her husband had 2 bank accounts with only his name as owner and no beneficiary. The couple had long held separate accounts during their marriage but did not realize that upon the death of the account holder the spouse would not have easy access to the account. We submitted the necessary paperwork to compel the banks to release the funds to the surviving spouse. The amount totaled to a little over \$5000 and was a life saver for our Client.

Lastly we helped our Client get naturalize. She had been a legal permanent resident or green card holder for 20 years and had not tried to naturalize. She was afraid that her limited English skills would prevent her from passing the test required to naturalize. Due to her age and her length of time as a lawful permanent resident we were able to help her with the naturalization process and even obtained a waiver of the English test. Several months later she was a naturalized citizen of the U.S. It had been a difficult year for our Client with the loss of her husband, but with our help we were able to stabilize and secure her income and status in the United States.

Optional Information on
Collaboration with Other
Advocacy Groups

Advocacy and Training with Community Partners:

Third parties, such as good Samaritans, social service advocates, bankers, clergy, health professionals, and first responders are often in a better position to identify elder abuse but are often untrained to identify such abuse especially with limited English speaking senior.

Identifying the many barriers preventing seniors from obtaining assistance led API Legal Outreach to found the API Elder Abuse Task Force in 2000. The Task Force works with other community and city agencies such as Canon Kip, Self-Help for the Elderly, Kimochi, On Lok, Protection and Advocacy, Veterans Equity Center, Adult Protective Services, the District Attorney's Office, the Mayor's Long-Term Care Council and the API Partnership for Community-Based Care and Support to strengthen services, provide technical assistance, and conduct community trainings about the prevalence of elder abuse and the availability of culturally and linguistically competent resources.

API Legal Outreach staff also provided training and technical support to a variety organizations and agencies in the area of elder abuse in the API communities. Recently, the elder abuse project has provided elder abuse trainings at Portsmouth Square, at single residence occupancies in Chinatown and the Tenderloin, visitation Valley Community Center, and the Canon Kip Senior Center. API Legal

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Outreach as also worked with Victim Services of the San Francisco District Attorney's Office to develop and implement a comprehensive, culturally competent API elder abuse training program for police officers, district attorneys and court personnel.

Provider: Asian Law Caucus

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

We completed our assistance for a client in June on a matter involving both housing and public benefits. The client, a senior monolingual Cantonese speaker, rents an in-law unit with his wife in the basement of a building in Chinatown. Their only source of income is Supplemental Security Income (SSI). Throughout the past 14 years, the client's landlord increased the rent beyond the limits set by the city's rent control law. Concerned that his SSI would no longer be enough to pay the rent, he came to our office for help.

We represented him in a case before the San Francisco Rent Board, where he prevailed. The Rent Board lowered his monthly rent and awarded him over \$12,000 in excess rent payments from the past. Although the landlord never paid the client back, he was able to use the award as credit against future rent owed, thereby saving him hundreds of dollars a month.

We then represented Mr. Huang before the Social Security Administration to ensure that the Rent Board judgment wouldn't affect his SSI, which he still relied on for all his other basic necessities. After several months, Social Security issued a decision stating that his SSI would not be suspended or reduced. The client and his wife finally breathed a sigh of relief, knowing they could keep their home and remain a part of their community in Chinatown.

Optional Information on
Collaboration with Other
Advocacy Groups

No new information to share.

Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client is a 66 year old Filipino man who thought he had won the "Jamaican Lottery". Instead, he lost all the money in his bank account and was unable to pay his rent. When he came to us he owed his landlord nine months worth of back rent and was on the verge of being evicted. We negotiated a payment plan and Adult Protective Services helped him find a money manager.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

July Client: A low income Spanish speaking senior came to our Senior Clinic after she was served with a civil complaint filed by a bank claiming the non-payment of a credit card debt in the amount of \$3,079.61. The client alleges that she never sign a credit card agreement or applied for it as she was the victim of ID theft. With our help, she filed a general denial arguing that she never received any notice of default and that was a victim of ID theft. The court suspended all proceedings based on the general denial filed by us and the plaintiff has ceased any further attempt to collect the debt.

August Client: A senior Spanish speaking-only resident of San Francisco, came to our Senior Law Clinic asking for legal help in order to start receiving SSA retirement benefits as she was 71 years of age. Before coming to our office, she was told by the SSA that she only had 28 credits and needed 40 to retire. Each full year of work provides 4 credits, so she needed 3 more years of work to complete the 40 credits. After a complete investigation of her personal files conducted by us, we found out that the information managed by the SSA was at least incomplete if not wrong. We were able to retrieve several tax declarations filed in the late 90's and early 00's proving that she has worked for more than 10 years and has indeed the number of credits needed to retire next year. We filed a request to recalculate the benefits based on the new information we found and attached the new tax declarations. On September 5, 2012 the administration informed us that the tax declarations were accepted and that she can retire by January 2, 2013.

September Client: A Spanish speaking senior resident came to our La Raza Senior Law Clinic with a civil collection action for a debt in the amount of \$2,794, that he could not pay because of the bad economy. The civil action was filed before the local court. Even though, the client admits owing GE Capital Corporation some money, he rejects the amount being collected as it is excessive and abusive. With our help, the client was able to file an answer to stop the proceedings and start a negotiation with the plaintiff in order to settle the case.

Optional Information on
Collaboration with Other
Advocacy Groups

During the 1st Quarter, we did two important presentations for low income seniors of San Francisco: one at the Western Addition Senior Center and another one at the Saint Francis of Assisi, both with an attendance exceeding 40 persons. All thanks to our portable projector and laptop that allows us to go around the city doing visually attractive presentations.

We keep participating with the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, but keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it.

Likewise, we keep collaborating with the Legal Aid Association of California, Senior Law Chapter in both

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the Steering Committee and the Languages Access Committee. Our goal is to provide our input in sensitive and crucial legal issues of interest for seniors.

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 8

California Legal Services (Title III B)
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Quarter: 1

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

Daisy, an extremely ill 76-year-old woman, called Legal Aid because couldn't get her abusive former caregiver to move out of her house. Daisy explained that she had fired her caregiver three weeks earlier and asked her to leave, but she hadn't. Daisy was afraid to have the caregiver living there any longer because she acted oddly, yelled at Daisy and called her names, and had broken property in the home. Because Daisy was frightened to be alone at night with the caregiver, Legal Aid filed a petition for a restraining order on the same day we interviewed Daisy. The court granted the temporary restraining order, which required the caregiver to move out of Daisy's home. The police department moved the caregiver out that evening. Legal Aid later represented Daisy at the permanent restraining order hearing. Although the caregiver appeared and opposed the petition, Legal Aid was successful in securing a permanent restraining order for Daisy. She is now able to have peace in her own home and has hired a new caregiver.

Ella, a 67-year-old woman, came to Legal Aid because she was being harassed and intimidated by her adult son Robert. He lived with her and was drinking daily, often to the point of drunkenness. When Robert was drunk he became abusive, physically menacing Ella, pressuring her for money, and in one instance throwing a hard object at her. Ella, who is monolingual Spanish speaking, wanted her son to move out before anything worse happened. The Legal Aid attorney met Ella away from her home because she did not want Robert to find out what she was doing before the restraining order was granted. She knew he would be furious. With the help of Legal Aid's bilingual project coordinator, Ella was able to tell her story. Legal Aid prepared and filed a petition for a restraining order. The court granted the temporary restraining order and ordered Robert to move out. That same afternoon, much to Ella's relief, the sheriff's office came to her home to make sure Robert moved out. The court is likely to grant a permanent restraining order at the upcoming hearing.

Mr. Lewis is a veteran who had stopped working after he was diagnosed with cancer and HIV. He is still going through cancer treatments, and although he tried to work part-time for a while, he now receives a modest Social Security benefit. Because his rent is almost as much as his Social Security, he has had to rely on CalFresh (food stamps) benefits to pay for food. After his annual eligibility review for CalFresh, Mr. Lewis received a notice that his monthly benefit amount was dropping from \$200 to \$75. Legal Aid helped him to appeal and found that the County had not taken into account his medical expenses, which would have qualified him for more benefits. The County agreed to re-determine Mr. Lewis's CalFresh allotment retroactively and supplement his benefits.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Provider: Legal Assistance for Seniors

Counties: Alameda

Optional Success
Story(ies)/Case Summary(ies)

LAS represented a client, Doris, who was seeking an Elder Abuse Move-Out Order against her son, Bill. Bill lived with his mother in her one bedroom mobile home and would not move-out. Doris is mostly bedbound and depended on Bill to cook for her.

By the time LAS became involved, Bill had taken over the living room (where he slept), the kitchen and dining room. This left our client only access to her bedroom. The areas where Bill lived were extremely filthy and unkempt.

Bill would frequently yell at his mother and throw things at her while she was lying in bed. Most recently, Bill had thrown a chair and her bed pan at her. He often would not cook for her either. Doris's health began declining which made her motivated to not tolerate the verbal and threats of physical abuse anymore. Her goal was to be able to have guests in her home and to be able to sit in the living room and have conversations with them.

LAS represented Doris in an uncontested hearing and obtained a 5 year Elder Abuse Restraining Order. With help from a friend, she was able to reclaim and clean up her home. The attorney saw Doris and was able to sit in her living room and have a conversation. Her place was spotless and it felt like a home as she had her decorations up on the walls and she had a smile on her face.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) has been awarded a contract by Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also work with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS have also been awarded contracts by the State Bar of California and the cities of Fremont, Hayward, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

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Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

No activity reported

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 1st Quarter of 2012-13, SALA provided on-site legal service intake appointments at 16 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

Participation on Local Task Forces

For the 1st Quarter of 2012-13, SALA attorneys also participated in the July and September meetings of the Elder Abuse Task Force of Santa Clara County and the September 2012 meeting of the Housing Task Force.

Other Activities: SALA's Supervising Attorney also participated in meetings of the Fair Housing Consortium during the Quarter. SALA became a member of this Consortium in July 2012.

PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

This month we assisted a client from Tracy, CA who had received numerous bills from a company that sells merchandise on television. She ordered a product that did not meet her expectations, so sent the item back. Although she returned the item, the company sent additional merchandise along with billing statements. Our client called the company and attempted to resolve the problem but was unsuccessful. She was very stressed about the situation.

We were able to assist our client by calling the company and demanding they resolve the situation. The company was cooperative. It cleared our client's account and was going to refrain from sending our client more items.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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PSA: 12

Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

To be provided with the Fourth Quarter Report.

Optional Information on
Collaboration with Other
Advocacy Groups

To be provided with the Fourth Quarter Report.

PSA: 14

Provider: Central California Legal Services

Counties: Fresno & Madera

Optional Success
Story(ies)/Case Summary(ies)

None reported

Optional Information on
Collaboration with Other
Advocacy Groups

None reported

PSA: 15

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Quarter: 1

Provider: Central California Legal Services, Inc.

Counties: Kings County

Optional Success Story(ies)/Case Summary(ies) None reported

Optional Information on Collaboration with Other Advocacy Groups None reported

Provider: Sarah Shena, Tulare Co. Senior Legal Service Counties: Tulare

Optional Success Story(ies)/Case Summary(ies)

1. Recovery of nearly \$3,500 for 81 yr. old. Client, who is monolingual Spanish and blind in one eye, discovered (with her daughter's help) that a disability insurance premium had been included in her Sears bill for several years. She did not remember signing up for the policy and Sears had replied to daughter's letter that client signed up over the telephone. Full refund of all premiums was received about a month after our advocate wrote to Sears (with copy to S. Dakota Attorney General, and the Federal Trade Commission) explaining that client could not hear on the phone so could not have knowingly signed up as they claimed, and that client was well past retirement and had no need for disability insurance when policy started.

2. Avoidance of Unfair Fee for Elder with Monthly Income of \$399. Client, who manages to live on \$399 per month because she owns a home (and prefers not to seek SSI or Medi-Cal), got notice from city that she must pay to have tree removed and sidewalk repaired. City had installed the tree without her permission 18 yrs. earlier. After her income and the unfair nature of the fee was brought to attention of city, the fee was waived.

Optional Information on Collaboration with Other Advocacy Groups

1. Collaboration with United Way of Tulare County, HICAP, Sequoia Community Mediation Center, Self-Help Resource Center, Information & Assistance staff and others continues as previously reported.

2. This quarter I participated in the first quarterly call with California Senior Legal Service Providers, intended to foster collaboration and sharing of resources.

3. I met with the head of a mediation program in a neighboring county to strategize about getting our local Probate Court to make better and more frequent use of local mediation services (including low cost and free services).

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Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

Three 1st Quarter Success Cases:

Case #1:

A senior individual and their Tribal elder spouse received an IRS notification that supporting tax documentation was not received and required clients to reply within two days or a penalty would be applied. The contacted our office and IMSLP Advocates reviewed the clients' IRS Income Tax filing for 2011 and determined the IRS was mistaken and clients had submitted all required information through E-file services. On behalf of the clients, IMSLP Advocates drafted a letter to the IRS stating all documentation had been submitted timely, attached copies of the supplemental documentation as previously submitted and requested that the no penalty should apply to the clients by the IRS. The IRS responded, accepted and withdrew the action.

Case #2:

An elder and seriously disabled client requested assistance with a landlord notice requiring the removal of a second air conditioning unit in the client's apartment within 7 days or face eviction. IMSLP Advocates reviewed the client's case including medical necessities and obtained a doctor's statement for the client that a single air conditioning unit is not sufficient for this client's health during the extreme heat in the summer (over 100 degrees) months. It was discovered and brought to the landlord's attention that they had allowed the same arrangement for this client the prior year during last summer. IMSLP Advocates sent the landlord a letter with the supporting documentation and the landlord agreed to allow the second air conditioning unit with as long as the set up was verified professionally to be safe and met all standards. IMSLP Advocates located a local certified business that agreed inspect and issue a written statement that the unit met all standards at no cost to the client. IMSLP Advocacy resulted in the client receiving written consent from the landlord to maintain the second air conditioning unit in place for all future summer months.

Case # 3:

A senior client that was homeless had applied and received both Social Security (SSDI) and Supplemental Security Income (SSI) based on the client's disabilities. Applications were simultaneously filed in December 2011. The client presented notices of SSI overpayment and SSI cessation notices dated July, 2012. IMSLP Advocates reviewed the client's case, obtained information and documentation to substantiate that the client had conformed to all the requirements and that the overpayment and cessation notices were sent to the client in error. IMSLP Advocates assisted the client with filing appeals on both notices and successfully ensured no interruption of any benefits including corrections to the benefits payments.

Optional Information on
Collaboration with Other
Advocacy Groups

The Inyo Mono Senior Legal Program coordinates services with the Inyo and Mono Department of Health Care Services, Inyo Mono Area Agency Advisory Council membership, Inyo and Mono Senior Service Centers, California Advocates for Nursing Home Reform, National Senior Citizens law Center,

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Western Center on Law and Poverty and HICAP.

PSA: 17

Provider: Central Coast Commission for Seniors

Counties: Santa Barbara and San Luis Obispo

Optional Success Story(ies)/Case Summary(ies)

Optional Information on Collaboration with Other Advocacy Groups

PSA: 18

Provider: Grey Law of Ventura County Inc

Counties: Ventura

Optional Success Story(ies)/Case Summary(ies)

Optional Information on Collaboration with Other Advocacy Groups

PSA: 19

Provider: Bet Tzedek Legal Services

Counties: Los Angeles

Optional Success Story(ies)/Case Summary(ies)

Optional Information on Collaboration with Other Advocacy Groups

PSA: 20

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Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

Optional Success
Story(ies)/Case Summary(ies)

Case Story #1:

Client is a 62 year old senior caretaker relative of her two grandchildren. She receives CalWORKS benefits for the grandchildren as a non-needy relative. Her husband is 68 and they have two mutual children under the age of 21. Client would have linkage to Medi-Cal Program based upon her two mutual children, but would have a rather high share of cost. Her husband has Medicare; client merely wants the Medi-Cal for herself. Advocate explained to client that she could apply for Medi-Cal based on being the caretaker relative of her two grandchildren. She could apply as a caregiver relative, but cannot request Medi-Cal for her husband or the two mutual children. This will give her a much lower share of cost.

Case Story #2 (11E-7005252):

A senior initially requested assistance in 2011. Client and spouse co-signed a lease for their daughter and son-in-law. When they broke the lease a UD lawsuit was filed and judgment was entered against all four in 2007 for over \$12,000. During 2008 and 2009 client and spouse had their bank accounts and wages garnished by two separate counties causing Plaintiff to be overpaid. Plaintiff had refused to enter Satisfaction of Judgment and/or refund the overpayment. In addition neither county was able to verify that Judgment had been fully satisfied. Client's only recourse was to file a Motion with the court. After intense legal research with the Code of Civil Procedures and several contacts with the courts and both Los Angeles and Orange Counties, advocate was able to obtain information and documentation required to prepare a Motion for client to compel Plaintiff to acknowledge and enter Satisfaction of Judgment, refund the overpayment, pay a penalty and request the court to order Plaintiff to pay damages for her failure to abide by the law. The client was very thankful because all of his attempts had been ignored and he did not know how to proceed. Advocate will be following up with client to determine the outcome.

Case Story #3:

An 80 year old male client was told that he not only was not going to get his security deposit back, but that he owed \$240 for a total of \$440. The landlord was charging him for repainting the apartment and for new carpeting. Advocate reviewed statement client had received from his landlord and wrote a letter on behalf of the client and contacted the landlord. Client had his security deposit returned and did not owe the landlord any money.

Case Story #4:

Client case to ICLS because he was being billed by a security company for services he did not order. The client indicated that his wife, who suffers from dementia and who is not the legal owner of the property (owned by the client prior to marriage) had signed a contract with the security company. The security company told the client that he was responsible for the contract because he was married to her. The advocate advised the client to write a letter to the security company indicating that he owned the property prior to the marriage and that his spouse was not on the deed. The advocate further advised that the client provide a copy of his tax statement, the marriage certificate and a statement from his wife's doctor indicating that she suffered from dementia. The security company wrote the client a letter stating that the contract would be voided and he did not owe any money.

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Case Story #5:

An ICLS advocate concluded Limited Action case in which a client was seeking dissolution of her marriage. At the beginning of the meetings she was scared, unconfident and unsure of the process. The advocate met with the client three times and she gradually and progressively gained confidence to be able to first file the Petition for Dissolution of Marriage, have it served on her husband and is now ready to conclude the case and bring it to trial.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

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Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Case Story #1:

Client is a senior who resides alone. A trusted friend used her personal information and opened a savings account in her own name and transferred a large sum of money from client's checking account to this savings account. Client, who does not use computers, did not discover the identity theft until several months later. Working with the client's social worker and the bank the advocate provided counsel and advice to the client regarding identity theft. Advocate also assisted client with completing the required Affidavit paperwork requested by client's bank to help them in investigating client's claim so that she might be reimbursed. The client thanked the advocate for services rendered.

Case Story #2:

Advocate provided counsel and advice to a senior client who sought to make a name change to assist his wife, a Legal Permanent Resident, become a U.S. Citizen. The client had been known by his name in the community since birth but discovered that this was not the name on his legal birth certificate. Advocate advised client about name change process as immigration officials informed the client that he would first have to petition for a legal name change and get a new birth certificate reflecting the name change and then go to Immigration and Petition for his wife's citizenship. The client, who understood the process very well, thanked the advocate for reviewing his case and providing advice on how to complete the Petition as well as how the process works.

Case Story #3:

After the client had been receiving SSI benefits for several years SSA informed the client that her benefits were going to be terminated since they had determined that she was no longer disabled. The Appeal was requested right away in addition to the Continuation of Benefits. While waiting for the hearing to be scheduled, new medical documentation was submitted to the SSA office. Based on the new medical documentation which included a letter from the client's psychiatrist, SSA found that the client continues to be disabled according to SSA rules. The client was very happy with the result of ICLS's representation and will continue to receive SSDI and Medicare benefits.

Case Story #4 (12E-2003300):

Prepared a Last Will and Testament for a client who did not read or write English. It was very important for her to be protected in the event that her husband was to pass. Client stated a burden had been lifted for her as a result of advocate's help.

Case Story #5:

Client was denied Medi-Cal benefits. County erroneously assumed that because client had been denied SSI Disability benefits that he had been found not disabled by SSA. Advocate requested a Medi-Cal State Hearing and represented client with the Appeal process. Advocate provided the SSI Denial Notice to prove that SSA had not denied benefits based on a medical review but based on client's income/assets. Also provided medical documentation to the county establishing that the client is disabled. The county approved the client's Medi-Cal benefits retroactive to the day of Medi-Cal Application

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(September 1, 2011) since the client had been found to be disabled according to Medi-Cal rules.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

During this quarter we assisted an elderly couple regarding a wage garnishment. The wife had left her job to care for both her husband, a stroke victim, and her elderly mother. The wife received payment as care provider. The wife's paycheck was garnished and 25% of her take home pay was withheld. The wife had not received any notices about the garnishment. The withholding of the money from wife's wages created a severe hardship for the family and they were uncertain as to how they were going to meet their monthly expenses. We were able to find that a court judgment had been entered against her several years ago. The levying officer was located in a different county. We were able to assist the clients in filing a Claim of Exemption, to which the creditor did not object.

Optional Information on
Collaboration with Other
Advocacy Groups

We are continuing to work with UCI Law School and the law firm of O'Melveny and Meyers to offer our SSI Clinic. We have eleven (11) law students signed up to help with the Clinic. We are pleased to note that all of the students who worked in the Clinic last semester or over the summer have returned this semester.

PSA: 23

Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

The senior attempted to apply for housing at a senior living community that offered subsidized rent and was denied due to an unfavorable background check. The Elder Law & Advocacy's Attorney requested authorization from the senior to contact the management that was in charge of the senior living community. The attorney discovered that there was a third party involved that processed background checks. Allegedly, the senior was convicted for a sexual offense in Florida. The attorney was able to research the validity of the sexual offense and discovered that the true offender shared a very similar name and same date of birth as the senior. The attorney was able to provide the information regarding the discovery that she had made about the wrong identity of the senior to the management. As a result of the attorney's research, the senior is now being processed for housing acceptance to the senior living community.

Optional Information on
Collaboration with Other
Advocacy Groups

Not Applicable for this quarter.

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PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial

Optional Success
Story(ies)/Case Summary(ies)

None Stated NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated NOT APPLICABLE FOR THIS QUARTER.

PSA: 25

Provider: Bet Tzedek Legal Services

Counties: Los Angeles City

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 26

Provider: Senior Law Project, Inc.

Counties: Lake and Mendocino

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

The Senior Law Project attorney presented an annual report to Mendocino Board of Supervisors regarding the state of the local IHSS program as well as the state budget issues affecting IHSS.

PSA: 27

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Provider: COUNCIL ONAGING

Counties: SONOMA

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 28

Provider: Legal Services of Northern California

Counties: Solano

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline.
Continued participation with community groups including: FAST, Solano Senior Coalition, and Vallejo
Senior Roundtable.

Provider: Legal Aid of Napa Valley

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 29

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Provider: Senior Legal Services

Counties: El Dorado County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

•We obtained 23 Restraining Orders, including some move out orders on behalf of clients
•We conducted our first judgment debtor clinic and had 4 participants
•We won a case before the Department of Motor Vehicles

Optional Information on
Collaboration with Other
Advocacy Groups

We refer many clients to other agencies, such as HICAP, Adult Protective Services, Veterans Administration, Project Sentinel, the Ombudsman, CRLA or the Family Law Facilitator/Self Help clinic in an effort to not duplicate services that are provided by those agencies.

PSA: 31

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Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

JULY 2012

Case No. 12E-3001112, 66 year old, rural, illiterate, client sought attorney's assistance beginning in March of 2012 with stopping elder abuse being perpetrated against her by her 48 year old daughter who also lives in Merced County. Client was particularly vulnerable because she was a recent widow, could not read or write, is nearly blind, suffers from medical ailments, is financially illiterate and cannot drive. Client's husband passed away during January 2012. During the funeral for client's husband in February 2012, client's nephew was in attendance from out of state. Before client's nephew returned home, he tried to assist client with settling her husband's affairs and at this time discovered rampant financial elder abuse by client's daughter being perpetrated against client. Client completed a Power of Attorney with her nephew at a private law firm, to permit him to assist her with resolving the financial elder abuse. Client and her nephew then contacted CCLS. CCLS attorney worked closely with client and her nephew to investigate the extent of the abuse, to request and review her credit reports, to close financial accounts that client's daughter had access to and to obtain an elder abuse restraining order against client's daughter. The elder abuse consisted of financial abuse, caretaker abuse, threats, intimidation and emotional abuse including threats by client's daughter to prevent client from visiting with her grandchildren, if client "told on her."

Client's petition for an elder abuse restraining order was heard on July 18, 2012 in the Merced Superior Court. Attorney was successful in obtaining a 3 year permanent restraining order for client against her daughter, which prohibits daughter from contacting client, being physically within 100 yards of client, from owning or possessing firearms and from having access to client's financial accounts.

Attorney further assisted client with completing fraud paperwork with her bank. The bank agreed that client's daughter committed fraud and mailed client a refund check in the amount of \$3,446.18. The bank informed client's nephew that it will continue its investigation and consider pressing charges against client's daughter. Attorney spent a total of 39.8 hours assisting this client.

AUGUST 2012

Case No. 12E-3003874, 88 year old, low income male client recently relocated to Merced from California. Client had a will, power of attorney and advance health care directive prepared while he lived in Arizona and thus sought attorney's assistance with preparing the same documents in California.

Attorney reviewed client's Arizona documents, advised client on differences between California law and his Arizona documents and assisted client with completing a new will, power of attorney and advance health care directive under California law.

SEPTEMBER 2012

Case No. 12E-3004804, 80 year old, low income, rural, Portuguese monolingual client who lives alone sought attorney's assistance with preparing a will and power of attorney. With client's daughter present to translate, attorney advised client on her rights and assisted client with preparing a will and power of attorney.

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Optional Information on
Collaboration with Other
Advocacy Groups

JULY 2012

Attorney spent 1.2 hours in collaboration with and/or making referrals to other AAA services in July 2012, including HICAP, PEARLS, IHSS as well as Valley Caregiver Resource Center and NAMI of Merced County.

PSA: 32

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

A couple came in to see our advocates in the Salinas office. Their problem was with the validation of a coupon for a cruise in the Bahamas. The couple has purchased a half-price coupon from what they believed was a reputable travel agency. However, when the couple called to arrange dates for their travel, they were given a hard time about using the coupon, attempted to be upsold more expensive travel and, when they refused to do anything but use the coupon as they had intended, the travel agent hung up on them. Normally, this is not a case to be considered unique, but the 82-year old husband of this couple had only been recently diagnosed with prostate and bone cancer – this cruise was likely to be the last trip he was going to take with his wife. Our advocate Yvette Vazquez called the travel agency and, after a few hang-ups on her as well, she was able to reach a Vice President of the company, who personally handled the travel arrangements for the dates the couple had wanted. The Vice President gave our advocate his personal office number (which she did use) and promised to help in the future with any other clients we may have.

The reviews of this company on the BBB, Yelp, etc... were pretty poor, referencing the hang-ups our clients had experienced as well. So, by our advocate's perseverance, this client was able to take a last cruise under their own terms and their own time.

Please Note – This is a CDA Data Team Note: This last sentence probably has a typo and the second word should probably be the word, "by" and read like this: So, by our advocate's perseverance, this client was able to take a last cruise under their own terms and their own time.

Optional Information on
Collaboration with Other
Advocacy Groups

Much of our collaborative efforts and presentations this quarter revolved around making contacts with other local non-profits who specialize in serving the low income and socially needy seniors – such as those with limited English skills, or who live in areas where it is difficult for them to travel to our offices for legal assistance. LSS met with representatives of the Center for Community Advocacy (Salinas), the United Farm Workers Foundation, a local low-income housing cooperative (CHISPA) and a few very small organizations in the rural areas of the community to begin forging alliances with these groups so that LSS can begin targeting seniors closer to their homes and at times more convenient for them to contact us.

PSA: 33

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Provider: Greater Bakersfield Legal Assistance, Inc. Counties: Kern

Optional Success Story(ies)/Case Summary(ies)

Optional Information on Collaboration with Other Advocacy Groups