

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

Fiscal Year: 2012-2013

Quarter: 3

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, Siskiyou, Modoc and Trinity

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 4

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

Fiscal Year: 2012-2013

Quarter: 3

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba Counties

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

Optional Information on Collaboration with Other Advocacy Groups None Stated

Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

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

January 2013
Assisted a mentally disabled senior with potential eviction from her rented trailer due to substandard conditions of the trailer. LSNC met the senior in her home and with her permission contacted her SSA representative payee to confirm client's history and housing issues. LSNC assisted the senior and her representative payee with negotiation for a much better unit inside the mobile home park with a lower rent. Client will receive moving assistance.

Assisted a mentally and physically disabled senior with negotiating the termination of her fixed term lease prior to the original expiration date of the lease. Senior alleged habitability issues which were substantiated in part by Placer code enforcement and environmental health agencies. Senior moved to new housing without substandard living conditions.

Drafted springing durable power of attorney (with oversight authority of alternate) for disabled senior. Senior's spouse was becoming unable to function as his agent due to memory loss and failing health.

Optional Information on Collaboration with Other Advocacy Groups

January 2013
Presentation by forensic accountant to Placer Community multi-disciplinary elder team (CAMET). What do forensic accountants do, what they look for and how they process cases of financial elder abuse.

Completed series of webinar trainings by the American Bar Association's Commission on Law and Aging on Advance Care Planning with People with Dementia.

February 2013
1. Brief presentation to subgroup of the Older Adult Collaborative: Medicare beneficiaries right to annual wellness exam and "welcome to Medicare" exam which includes – at patient's option – review of health surrogate decision making tools such as AHCD and POLST.
2. Attended LSNC/WCLP Health Task Force Meeting and Training and discussed issues advocates are seeing.
3. Participated in LAAC Senior Legal Service Provider call. Reviewed advocacy issues and resources.

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Fiscal Year: 2012-2013

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Provider: Legal Services of Northern California

Counties: Yolo

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

The client is an elderly man who has been applying at various senior apartments but has been rejected multiple times. He sought assistance from LSNC when he asked to see the background report that formed the basis of the rejections. The report erroneously showed a judgment against the client for an unlawful detainer that had been dismissed the year prior as part of a settlement. An unlawful detainer registry had reviewed the court records and reported a judgment even though the case was pending at the time. LSNC immediately contacted the credit reporting agency and provided proof that they were erroneously reporting an unlawful detainer judgment that was preventing our client from obtaining housing, which is illegal under California law. The credit reporting agency removed the judgment from his record and he is in the process of obtaining subsidized housing in a senior complex.

The client is a 79 year old female with hearing loss residing in a rural part of the county. She applied for CalFresh benefits with the assistance of Senior Link of Yolo County. The Department of Employment and Social Services scheduled her for a phone interview to complete her CalFresh application. Because the client is hard of hearing, she missed the phone call and was denied benefits. She sought assistance from LSNC. LSNC advocates intervened and requested an accommodation based on the client's disability. The client's application was reinstated and she was granted benefits that will enable her to purchase nutritious food on her limited, fixed income.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff held office hours at the following locations:

Rural Innovations in Social Economics (RISE), a nonprofit agency serving low income persons in Esparto, on the 1st Thursday of the month;
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;
Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month;
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;
RISE in Winters on the 3rd Wednesday of the month.

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.

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 5

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Provider: Legal Aid of the North Bay

Counties: Marin

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

Our clients, a couple who moved into their apartment in August 2010.

One of the clients is elderly and disabled.

In December of 2010 there were heavy rains; the wall in the bedroom was soaking wet; there was mold on the walls. Clients called the landlord and informed re mold.

This a ground floor apartment (there was standing water in the crawl space.)
Clients battled mold all winter. The mold triggered asthma for one of the clients, and she almost had to be hospitalized.

Evidentially there was an issue with the same landlord at another apartment with a previous client of legal Aid of Marin. Landlord insists that there was never a problem before.

Clients have MHA voucher. The apartment is sub-standard. MHA inspection revealed several problems. Landlord did not wish to make repairs recommended by MHA' instead, served clients 30-day notice.

Clients were trying to relocate and were advised to contact San Rafael Building Inspector as well as health provider to report conditions. They were also advised that they could sue landlord for damages.

Medical examinations provide the following assessment: "Cough, post viral tussive process quite possibly with associated."

The Law office of Eric Lifschitz settled favorably for the clients and they moved out.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 6

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Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Clients are a Cantonese speaking couple in their mid 60's who live in Chinatown. They have a bipolar son whose behavior has resulted in their landlord serving them with an eviction. We assisted them in obtaining a restraining order against the son and negotiated a settlement with the landlord.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with the Eviction Defense Collaborative (EDC) on eviction cases involving elderly clients. They prepare responsive court papers for clients who have the skills to represent themselves. We provide representation to clients who lack those skills and have a substantive defense, or are otherwise likely to prevail. Additionally, EDC can sometimes assist clients who are being evicted for non-payment of rent with a no interest loan. Mutual referrals are facilitated by the fact that we are both located in the same mid-Market Street building.

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

Bob and his wife Maggie immigrated to the United States in 2003. At that time, he already had a kidney disease, but it was manageable then. It got worse a few months after his arrival in the United States. For five years, he required dialysis treatment in order to live. Although his wife was working, her meager income is not sufficient to pay for their daily living expenses. Bob applied for SSI in 2009 and was approved. For three years since then, his SSI payments enabled them to cover their day-to-day expenses and pay for the costly co-payments for his numerous medications. This year, after reviewing his continued eligibility for SSI, the Social Security Office decided that he should not have received any SSI payments for the past three years. He was told to pay it all back--over \$12,000 in alleged SSI overpayment. Bob and Maggie anxiously contacted many legal services agencies to get help. Our staff decided to take this case.

The timing of the ALJ hearing was awful, which had been scheduled at the end of November. Our staff already has our hands full with our removal case. Our staff also had her complicated child sexual abuse FL trial in early December. So we agreed to represent Bob at his ALJ hearing. API Legal Outreach spent a few days going through all of the facts and sorting dozens of SSA notices, and the next few wrapping my head around the laws, regulations, and guidelines for SSI. The day before Thanksgiving, we finally finished our brief for the hearing. It was filed the same day. At the hearing, the judge said he found my brief persuasive. There was no testimony needed. The judge ruled for our client on both accounts--he concluded that there was no overpayment in this case, and even if there was, that our client is entitled to a waiver because of his circumstances.

Optional Information on
Collaboration with Other
Advocacy Groups

In collaboration with some social service organization, API Legal Outreach has helped a number of identity theft victims. One elder almost lost his senior housing and was told it was because he had more income than he was reporting. API Legal Outreach discovered someone else has illegally used his social security number and working in another state. We were able to help the elder keep his home.

In another case, an elder was being sued for credit card debt. His bank account was levied and several hundred dollars taken out. APILO learned that someone used the elder's information to get a credit card. We were able to show this elder did not open this account, and eventually the credit card company returned the money.

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco

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

January Client: A low income Spanish speaking-only senior resident came to our Senior Law Clinic because he needed help with an ATT bill that was causing him a negative credit history hence making him ineligible for public housing. We were able to negotiate a settlement agreement that set him up on a payment plan to clear his debt and make him eligible again for public housing. After we submitted the payment plan and on-time payments to the public housing case worker, he was eventually approved for public housing. He relocated successfully to his new place by the last weekend of March.

February Client: A Spanish speaking-only senior resident of San Francisco came to our Senior Law Clinic because he was receiving letters from a collection agency for the sum of \$2,382. The debt was for towing and storage of a vehicle he had gifted to someone else. The client had tried to explain to the collection agency that the car did not belong to him anymore. However, the collection did not cease in the efforts to collect in spite of our requests to cease and desist. We were able to obtain documentation from the DMV that proved the change of ownership. We effectively provided the documentation to the collection agency, so they cancelled the collection with the evidence we submitted.

March Client: A Spanish speaking-only senior resident of San Francisco came to our weekly senior clinic with a private pension case. The pension department for her union wanted a Property Settlement for her divorce but she did not do a property settlement when she divorced many years ago as there was no property. We submitted a Divorce Decree along with a letter explaining that there was no Property Settlement whatsoever. The pension department agreed to process her application for pension without the property settlement. Thanks to our advocacy, she will begin getting pension benefits by the end of April.

Optional Information on
Collaboration with Other
Advocacy Groups

2013, has been a very active year. During this quarter, we did three important presentations for low income seniors of San Francisco: the first one at Cannon Kip senior Center, the second one at OMI Senior Center and the third one at the 30th Street Senior Center, all the presentations hosted a great audience. We served a total of 75 seniors. 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, we keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it. For the spring issue bulleting already published, we drafted the Senior Profile.

Finally, we collaborated with the Legal Aid Association of California, Senior Law Chapter in both 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.

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Provider: Asian Law Caucus

Counties: San Francisco

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

A 95 yr. old monolingual Chinese woman has lived in North Beach for 60 years at her apartment where she had raised her family. The landlord recently was attempting to increase the rent four-fold or threaten to evict her. These efforts were due to the tenant's son returning to take care of his mother. The landlord's concern was whether the son would attempt to "inherit" the rent-controlled tenancy. The concern became heightened when, last October, the mother flew to Colorado for an extended visit with her daughter. The landlord subsequently issued a notice to increase the rent four-fold to \$2,500 per month. We entered an appearance in the Rent Board proceeding in which the landlord was asserting the claim that rent could be reset because the mother was no longer a tenant. We also arranged a Skype video conference with the parties to assure the landlord of the mother's intent to return to San Francisco in the near future

Ultimately, we were able to negotiate a settlement in which the landlord dismissed the case and rescinded the rent increase. In exchange, we set up a rent payment arrangement that gave the landlord assurances that it was not conceding to the existence of the son's independent right to possession. The son was also not required to stipulate to anything compromising his claim to remain an occupant if and when the mother vacates the premises.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 8

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Quarter: 3

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

For-profit "trade schools" entice prospective students to enroll and take out federal student loans to pay tuition. These students often end up with loan debts they cannot repay because the school degrees offer no advantage in obtaining employment. Mr. Q, a senior, took out a loan to pay for a trade school twenty years ago, but fell behind in repayments because he could not find a job. The federal student loan agency threatened to garnish his Social Security retirement benefits. It was frustrating for Mr. Q because he did not understand that the federal agency had turned his loans over to a private collection agency. We reviewed the default notices and intervened to stop the garnishment of his Social Security benefits. We also negotiated a reasonable \$20/month repayment plan that Mr. Q could afford. Mrs. R is a 64-year old woman who had been the victim of severe domestic violence during her marriage of almost fifty years. She had left her husband and tried to get a restraining order several months ago, but the permanent restraining order had been denied. Legal Aid worked with Mrs. R to learn more about her situation and investigated the reason for the original denial. It was clear that the judge had not understood the seriousness of violence in the relationship and the real fear Mrs. R had of her husband. We helped Mrs. R file a new restraining order petition that better explained the history of abuse. We worked hard with Mrs. R, her son, and a social worker at APS to make sure the court understood Mrs. R's story. We represented Mrs. R at the permanent restraining order hearing and were successful in getting the court to order a one-year restraining order. A Legal Aid family law attorney is now helping Mrs. R get a divorce from her abusive husband.

Optional Information on
Collaboration with Other
Advocacy Groups

The Senior Advocates attorney continues to work with the Adult Abuse Prevention Committee on the Theatre of the Oppressed project and with the Commission on Aging's Legislative Committee to identify potential systemic advocacy initiatives.

PSA: 9

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

LAS received a referral from Adult Protective Services (APS) regarding abuse. Mr. D had been physically abused by a daughter who lived in the home with Mr. D. When a son picked up Mr. D to go to a doctor's appointment, he noticed Mr. D had two black eyes and several other bruises on his body. The son reported the abuse to APS. After the son reported the abuse, Mr. D admitted it was not the first time that he had been physically assaulted by his daughter. Mr. D had been suffering abuse for years. LAS represented Mr. D in getting a restraining order that removed the daughter from the home and kept her away from Mr. D. LAS also assisted the client in the criminal prosecution case, ensuring that Mr. D knew his rights at every step. Mr. D now happily lives with his son who helps take care of him.

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 works 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)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 3rd Quarter of 2012-13, SALA provided on-site legal service intake appointments at 22 senior centers or sites in Santa Clara County. These sites included: 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, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Evergreen 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 3rd Quarter of 2012-13, SALA attorneys also participated in the February meetings of the Housing Task Force and the Public Benefits Task Force and the meetings of the Elder abuse Task Force in January, February, and March.

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)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 12

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Quarter: 3

Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu
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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 & San Benito

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 Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 15

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Quarter: 3

Provider: Sarah Shena, Tulare Co. Senior Legal Servic **Counties: Tulare**

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

Optional Information on Collaboration with Other Advocacy Groups

Provider: Central California Legal Services, Inc. **Counties: Kings**

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

Optional Information on Collaboration with Other Advocacy Groups

PSA: 16

Provider: Catherine Denevi, Esq. **Counties: Inyo and Mono**

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

Optional Information on Collaboration with Other Advocacy Groups

PSA: 17

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Provider: Central Coast Commission For Senior Citizens **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: 13E-7001592

A 79 year old married senior with a disabled spouse requested ICLS assistance regarding a lawsuit filed against him and his spouse for breach of contract. The client had been solicited by phone by a construction company offering to insulate his home, which he had been contemplating on having done for some time. The client was instructed to apply for credit with Wells Fargo Bank in order to finance the total cost of over \$4,000. Even though the work had been poorly done, the client never complained and continued to make the payments to Wells Fargo. When the client stopped receiving statements, he stopped making payments. The client is so behind now, that he is unable to bring the account current due to the interest and late fees; and he is in no financial position to negotiate a settlement for less. The advocate advised the client that his Social Security benefits were protected and that he should also have a Homestead Declaration recorded to protect the equity in his home. The advocate agreed to contact opposing counsel on the client's behalf and to prepare a Homestead Declaration for the client and his spouse. The advocate further advised the client to file a complaint with the Contractors' State License Board and the BBB. The client was grateful for the legal services ICLS provided free of charge.

Case Story #2: 13E-7000234

A 66 year old client requested ICLS's assistance regarding a telephone solicitation to enter a sweepstakes drawing and induced her into ordering magazine subscriptions, giving her a better chance to win. The client agreed to purchase several magazine subscriptions and authorized her MasterCard to be charged. When the client received her MasterCard statement reflecting a charge for \$39.90 she decided to cancel but was unable to contact the company since she had not been provided with a number to call and her MasterCard statement did not include sufficient information. With the assistance of customer service the client was able to contact the company; when she requested that they cancel her subscriptions and account she was informed that it was too late, she had committed herself to four years of magazine subscriptions and would be charged \$39.90 per month for two years.

The advocate advised the client that verbal contracts are just as binding as written contracts, but the company's failure to disclose the terms and conditions may void the contract. The advocate agreed to contact the company on the client's behalf. After two conversations with the company the advocate was able to negotiate cancellation of the subscriptions and a credit to the client's account. The client avoided having to pay over \$900 in monthly payments for two years. The client was happy and grateful for ICLS's ability to resolve this matter for her.

Case Story #3: 13E-7002280

The client is a 60 year old whose sole source of income is social security. He lives alone and his income puts him far below the federal poverty level. The client's only asset is his mobile home which is paid off and worth approximately \$13,000. He has large amounts of credit card debt and medical bills but can no longer afford to make the payments on the credit cards without foregoing food or other necessities. The client has paid some credit cards off but is no longer afford to do so. He has an 87 year old ailing mother who is planning on leaving her home to the client and his siblings upon her passing. The client wanted to

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know what his options are for dealing with the debt.

The advocate advised the client that he can make payments on the debt. He can contact the non-profit organization Consumer Credit Counseling Services at 800-741-7040 and they will contact his creditors and work out a feasible payment plan. He could also contact the creditors on his own to work out a payment plan; however, since his income is so low this is not a likely option.

The advocate further advised that the client could file bankruptcy and based on his current income, he would qualify since bankruptcy is now income based. The client had stated that he owned his mobile home which was paid off and is worth about \$13,000. The advocate advised that the client immediately contact HCD at 951-782-4431 and request a Homestead form. He would need to fill it out and file it. This would protect all the equity in the client's home pursuant to California Code of Civil Procedure 704.730.

The client was also advised that he could also opt not to file for bankruptcy since his sole source of income is social security which is protected from levy pursuant to 42 USC §407 and the account which it is direct deposited into pursuant to California Code of Civil Procedure §704.080. The advocate discussed the importance of not depositing any other monies into the account that holds your social security benefits. This means that the client would be opting to do nothing and allow the creditor to use you and obtain a judgment. The advocate advised that the creditor has the right to try to collect the debt by contacting you by mail, phone, and even filing a law suit and serving you, however, even if the creditor does sue you and obtain a judgment against you they will not be able to collect against you as long as you record the homestead and your sole source of income is social security.

Regarding the credit accounts already paid off the client was advised to not close those accounts because part of your credit score is determined by the length of debts and the timeliness of the payments both of which are reflected in the accounts that have been paid off and so it's in the client's benefit to leave those accounts open. Closing them may in fact lower his credit score.

Finally, as to the issue of the inheritance. The client was advised that if a lump sum in the distribution of the inheritance is received it may be levied upon if deposited into a bank account. An inheritance is not protected from levy. The client was also advised that he could also opt to use a trust and collect small monthly distributions which will make it less likely it will be levied upon. There may also be tax consequences as to the distribution. Therefore, he should discuss this issue with an estate and tax attorney for more specialized advice.

Lastly, the client was advised that if he opted to file for bankruptcy he may be able to attend ICLS's bankruptcy clinic held in the San Bernardino office.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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PSA: 21

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Case Story #1: 13E-2000306

A 92 year old homebound client with cancer needed a Health Care Affidavit. Advocate met with the client at her home and prepared the Affidavit. The client was very grateful and happy to have the Affidavit prepared because it ensured that her friend would have a say if the client was temporarily incapacitated. The client trusted her friend and wanted the friend to be her agent.

Case Story #2: 12E-2008993

A senior client had been denied Medi-Cal because they owned a timeshare which placed the client in excess of the asset limit. The advocate obtained proof that the timeshare could not be surrendered, sold or that it had any value. The client was then approved for Medi-Cal.

Case Story #3: 13E-2002480

A senior client had been recently evicted and was moving from one friend to another, from one relative to another, spending a night here and there. He had past due child support arrears. The child is now 24 years old. The advocate provide counsel and advice on the child support matter regarding the appeal ability of past judgments and what the client should do regarding his child support arrears.

Case Story #4: 13E-3002701

A senior who lived with his daughter was facing eviction. The advocate appeared in court on behalf of the senior at an Unlawful Detainer Trial. The advocate successfully negotiated with the opposing party 18 days for the senior to move out.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 22

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Provider: Legal Aid Society of Orange County

Counties: Orange

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

In our Limited Conservatorship Clinic, we assisted an elderly couple living in Santa Ana obtain a limited conservatorship over the adult son. The adult son suffers from a brain disorder and is unable to provide for himself. The parents needed a Limited Conservatorship to allow them to enroll their son in a health plan and to obtain medical information and make health care decision on his behalf.

Optional Information on
Collaboration with Other
Advocacy Groups

We have continued in our role serving on the Advisory Council for the Model Approaches grant for California. We also are active with the Senior Legal Services Provider (SLSP) Committee and are in the process of working with the Legal Aid Association of California(LACC) and Northern California Legal Services (LSNC) to plan several Region Meetings involving Older American Act funded legal programs in California and their respective HICAP programs.

PSA: 23

Provider: Elder Law & Advocacy

Counties: San Diego

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

The senior lived in a motel, on and off, for about a year. The senior did not receive any refund of room tax charged to the senior for periods in which he occupied the room for a month or more. The senior eventually moved out in October 2012 and contacted the motel multiple times regarding the senior's refund check. The motel did not respond to the senior's request. The Elder Law & Advocacy attorney wrote and mailed a demand letter to the motel at the end of December 2012. In the beginning of January 2013, the motel mailed a check for the full refund for which the senior was entitled to. The senior was grateful to have received the refund check.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial

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

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

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

Fiscal Year: 2012-2013

Quarter: 3

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: Legal Services of Northern California

Counties: Lake and Mendocino

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 27

Provider: COUNCIL ON AGING

Counties: SONOMA

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

APS referral to COA for assistance with:
1) Judgment Proof Letters and Homestead Declaration for senior with Debt Problems.
2) Durable Power of Attorney and Will for client

COA referral to HICAP for assistance with:
1) Medicare application process

PSA: 28

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

Fiscal Year: 2012-2013

Quarter: 3

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

Provider: Senior Legal Services

Counties: El Dorado

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

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

Fiscal Year: 2012-2013

Quarter: 3

Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

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

We successfully did a kick-out order for a live-in caregiver who refused to move after she quit working for the senior. She was also working for another senior and we arranged for an educational meeting between the new senior and his wife with APS and a SEAPA rep;

We successfully assisted a senior woman get guardianship for her 2 great grandchildren and then a restraining order against her grandson (the father of the great grandchildren). Working with the Family Partnership Center and other housing agencies we were able to help her find housing and financial help with her utilities and security deposit.

We successfully negotiated extra time for a client who was wrongfully evicted from the home of his deceased landlord by the landlord's brother. The brother turned off the utilities when our client and other tenants refused to move after getting just 3 days notice. We contacted the brother and explained the tenants' rights to him and he turned the utilities back on and the tenants were allowed to stay 30 days.

Optional Information on
Collaboration with Other
Advocacy Groups

As stated above, we collaborated with Project Sentinel, SEAPA, APS, the Family Partnership Center, Catholic Charities/Ombudsman program.

PSA: 31

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

Fiscal Year: 2012-2013

Quarter: 3

Provider: Central California Legal Services

Counties: Merced

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

MARCH 2013

Case No. 13E-3008122, Attorney assisted Spanish monolingual, low income, disabled senior client with stopping elder abuse perpetrated against her by her daughter and son-in-law. In the months before coming to CCLS, client had allowed her daughter and daughter's husband to live with her and her mother in her mobile home. The daughter was to pay the utility bill. As months went by the daughter not only refused to pay the bill as promised, but she and her husband regularly used marijuana and kept them in the client's home, and became verbally abusive to the client. Client asked her daughter and son-in-law to leave several times, but they refused to move out. With the help of a translator, attorney drafted and served a Three Day Notice to Quit on daughter and son-in-law, and filed an unlawful detainer (eviction) in Superior Court against them. Within a week's time, the daughter and son-in-law moved out and surrendered her key to the client. Client and her elderly mother are thankful that they no longer have to worry about verbal abuse and drugs in their home.

Case No. 13E-3008277, Attorney assisted 93-year-old client in executing a will, power of attorney, and advanced medical directives. Client suffered from poor vision and limb weakness, making it impossible to read words on a page or to sign her name. Attorney read and explained the effects of each document to the client, and filled in the names and provisions as directed by her. As client was unable to sign her own name, attorney signed the documents in her presence and at her direction. Client now has the peace of mind knowing that her last wishes will be carried out, and that her finances and medical care can be handled by her daughter.

Optional Information on
Collaboration with Other
Advocacy Groups

Attorney met and made introductions with Maria Nava, Senior Services Program Supervisor, and Rick Buncayao, HICAP Program Manager at the Merced AAA center on March 11, 2012. Discussed program goals and priorities.

PSA: 32

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

Fiscal Year: 2012-2013

Quarter: 3

Provider: Legal Services for Seniors

Counties: Monterey

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

Legal Services for Seniors' Client success stories:
January of this year a Salinas client and his wife purchased an adaptive "walk-in" bathtub for \$15,000. Our client's wife has arthritis and so could not get into a regular bath and didn't have the stability to stand and shower. The tub's automatic water thermostat malfunctioned almost immediately. The tub company came out when the client made a first call the tub worked for about two weeks then again quit working, putting out only extremely hot water regardless of where the thermostat was set, making the bath unusable for the couple.

When called again by our client, the company refused to come back out to honor their warranty, asserting it was operator error, stating they would only return if clients agreed to a \$100 service call and payment for any work completed, even though bath had been purchased only two months earlier.

Our client tried to work with a company supervisor to get their warranty honored, but after the supervisor's third refusal to address the situation, the clients came to see us. After literally one phone call by our legal advocate Victoria Flores to the Company's supervisor, the company (explaining to Ms. Flores their previous refusals to help our client was "an unfortunate misunderstanding") agreed to replace the computer thermostat with "old-fashioned" hot and cold faucet knobs. In her phone call, Ms. Flores did not threaten to sue the company or accuse them of fraud - she simply asked the supervisor (after identifying herself as calling from Legal Services for Seniors) why her clients had been made to spend \$15,000 on a bathtub that quit working after two months.

With only one phone call, our advocate was able to achieve a result that our clients could not get after working for two months.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors continues to collaborate with local non-profits such as the Alliance on Aging, Meals on Wheels and the Food Bank and AAA to provide county-wide direct legal services, community education to other non-profits to reach as many seniors as possible. By collaboration with these other social organizations, their staff and volunteers can direct seniors with legal problems to Legal Services for Seniors when these seniors are encountered in non-legal situations. Additionally, when there are non-legal issues included in problems which we see in our assistance, we have a good avenue for referral to those non-legal organizations to give our seniors well-rounded solutions to their problems.

PSA: 33

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

Fiscal Year: 2012-2013

Quarter: 3

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

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

Optional Information on Collaboration with Other Advocacy Groups