

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

**Fiscal Year: 2009-2010**

**Quarter: 3**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt, Del Norte**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Shasta, Siskiyou, Lassen, Modoc, Trinity**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 4**

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**PSA Level Quarterly Narrative Report**

Fiscal Year: 2009-2010

Quarter: 3

Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

A Sacramento senior rented a room from some “friends” who abandoned the house when it went into foreclosure. He called days before a physical eviction by the sheriff was to take place. Since he was never properly served with eviction papers, he could have prevailed with a motion to set aside the judgment and gained more time. Staff attorney Sheri Newman prepared to do that on the client’s behalf, but first she informed the bank’s attorney of her intention. The attorney checked with his client and agreed to put off the eviction several weeks, which gave the client enough time to relocate successfully.

A foreclosure case that began in 2008 finally culminated in a settlement, arranged by staff paralegal Manny Randhawa, by which a Citrus Heights couple in their late 80s avoided foreclosure of a predatory loan by obtaining a reverse mortgage. The lender accepted the proceeds as full satisfaction, writing off the remaining \$176,000 of the balance owed.

During a cold spell in early winter, an 85-year-old Sacramento woman found her house too chilly and requested an inspection of the heating/air conditioning system in her condominium from a company that sells and services such equipment. The technician convinced her that her system was beyond repair, and later that day, a sales person from the company showed up and persuaded her to sign a contract for whole new system costing more than \$9,000, with expensive financing to boot. That evening, the senior mentioned it to a neighbor (all the units in the project contained the same equipment). He checked it out and found that 1) The AA battery in the senior’s thermostat needed to be replaced; and 2) the temperature in her water heater, which provides the heat, hadn’t been turned up for the winter, as recommended. Once those were taken care of, the system worked fine. He helped the senior contact SSLS, where attorney David Mandel made sure she successfully canceled the contract within the statutory three-day limit. Unsuccessful in getting an explanation from the company, he helped the client file a complaint with the Better Business Bureau. Only after that did the company refund what the client had paid for the inspection – which she hadn’t even requested.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Staff held a series of discussions and meetings with Volunteers of America, which runs the new Sacramento safe house for victims of elder abuse, specifically to propose a partnership in conjunction with a grant application SLH submitted in February to provide legal assistance for elder victims of domestic violence. Whether or not the grant is made, SSLS staff now know how to access the facility if needed, and its staff know to help victims get legal help.

David, along with staff attorney Michelle Satterlee, attended the California Wellness Foundation Healthy Aging conference in Los Angeles, Feb. 1-2. They also traveled to San Francisco for the State Bar’s Foreclosure Forum for legal advocates on Feb. 24.

David and pension project coordinator Justin Freeborn went to San Francisco March 3 to participate in a “listening forum” organized by the Administration on Aging with Assistant Secretary Kathy Greenlee and other aging activists from around the region.

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Once again, SLH/SSLS VISTA members were instrumental in organizing and staffing a Senior Connect event, this one held March 17 at the Lemon Hill Community Center.

**Provider: Legal Services of Northern California**

**Counties: Yolo**

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

An 80 year old woman sought assistance at LSNC's Yolo County office after her care provider physically neglected her for three days. The client is homebound and only able to ambulate to her wheelchair with assistance. The care provider left her in bed with no assistance or access to food or water for three days and then forced her into a nursing home and listed her home for sale after obtaining a fraudulent power of attorney. In addition, the care provider depleted the client's bank accounts and sold her only assets. The client's grandchildren became aware of the situation and brought the client in to LSNC's office. LSNC filed an elder abuse restraining order that was temporarily granted pending a hearing scheduled two weeks out. The care provider has been barred from contacting the client or having access to her bank accounts and other assets. Collaborating with two volunteer attorneys, LSNC will represent the client at the hearing to make the restraining order permanent.

LSNC also prevented a 73 year old man from being evicted from low income housing in which he had resided for 8 years. The client's bank used his monthly Social Security check to pay down his credit card issued by the same bank, leaving the client short of funds for rent. The client had only charged \$500 on his credit card for expenses associated with his December art show where he displays works of art for purchase to the public. When he was unable to pay rent, his landlord served him with an unlawful detainer lawsuit. LSNC prepared an answer for the client and obtained assistance for the client through the Homeless Prevention and Rapid Re-Housing Program (HPRP), in which LSNC participates as a partner. LSNC was able to leverage WRP funds, which we used to pay the client's back owed rent. The landlord agreed to dismiss the lawsuit.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff held office hours at Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the first and third Wednesday of the month. LSNC staff also held office hours the second Thursday of the month in Knights Landing at the Yolo Family Resource Center and in Winters at the Winters Healthcare Foundation on the 4th Wednesday of the month. LSNC also held its monthly clinic at the West Sacramento Senior Center on the second Monday of the month. In addition, LSNC staff collaborated with the Yolo Family Resource Center to provide a workshop on Food Stamps on March 9th. Further, LSNC collaborated with the Winters Senior program to provide a workshop on debt defense at the Winters Senior Luncheon club on March 10,2010.  
Legal Representation: 42.6  
Legal Advice/Assistance: 136.7  
Community Education: 4  
Special Outreach: 2  
Total Hours: 185.3

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**Provider: Legal Services of Northern California**

**Counties: Nevada, Placer, Sierra**

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

January 2010  
Mother Lode Regional Office (MLRO) staff assisted a senior who was denied unemployment benefits by providing the senior with information regarding her rights and research applicable to her legal position. Staff assisted the senior with her statement in support of her appeal and by representing her at her appeal. The senior won her appeal and has since received her back unemployment benefits in full.

Optional Information on  
Collaboration with Other  
Advocacy Groups

January 2010  
Staff provided information assistance to Placer APS regarding the rights of seniors who may have been victims of predatory lending practices.

Staff continue to work with Sierra County staff at a skilled nursing home to assist a institutionalized senior who may have been the victim of financial abuse by a family member.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

Staff continue to participate in the Homeless Prevention and Rapid Rehousing Programs in Placer and Nevada Counties which assists seniors and other tenants who may be at risk of losing their rental housing.

Staff continue to work with HICAP and the Long Term Care Ombudsman to identify and assist institutionalized seniors at risk of losing their housing.

February 2010  
Staff provided information assistance to Placer APS regarding the rights of seniors who may have been victims of predatory lending practices.

Staff continue to work with Placer and Nevada County non-profit agencies and government agencies on the Homeless Prevention and Rapid Rehousing program.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

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March 2010  
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**Provider: Yuba Sutter Legal Center**

**Counties: Yuba & Sutter**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 5**

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**Provider: Legal Aid of the North Bay**

**Counties: Marin County**

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

Last year we had a senior disabled woman in a wheel chair that was having mobility problems at the Community Garden where she has had 2 plots for many years with many plants, including wine vines. Because she is confined to the wheel chair, moving around in the dirt was a big problem and she was asking for wooden planks or over devices so she could navigate her two plots. This woman loved to be in her garden and said, it was her greatest joy in life. After months of negotiating with the garden, private attorney Christopher Ohlsen was able to make a deal to move the client to two new plots after the winter crop season and that the garden people would build her a sun trellis on the new plot and help her move whatever plants could survive a move. These new plots were near the front of the garden and much more accessible to her chair.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 6**

**Provider: Legal Assistance to the Elderly**

**Counties: City and County of San Francisco**

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

Client is a 68 year old Caucasian female and cancer survivor, living in a home which she used to own, but deeded to her son seven years ago, with the verbal understanding that she could continue to live there rent free. The son subsequently demanded market rate rent from his mom, along with back rent, and when she failed to pay, served her with an eviction notice. We represented her, engaged in discovery and negotiated a settlement in which her son agreed to waive all back rent and to pay a lump sum settlement which gave her enough funds to move and put a deposit on a new unit.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We are working with the San Francisco Office of the National Council on Aging, which is implementing a new program for seniors called the "Economic Security Initiative." This program is designed to provide seniors with help in finding jobs, securing public benefits, dealing with housing related issues and coping with a variety of challenging financial issues. We have entered into a formal memorandum of understanding, designed to facilitate mutual referrals and are participating in their stakeholder's meetings

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

There has been an increase of financial abuse against Asian Pacific Islanders seniors by denying mutual benefits that were established early on by an immigrant through Vietnamese-Chinese Mutual Aid Community Friendship Association. Allegations of seniors being scammed from funeral/burial cost has been on a rise. API Legal Outreach is working collaborative with the SF District Attorney's Consumer Fraud Unit in the prosecution of such cases and representing the clients in at the civil level to recover the seniors lost. The seniors were promised that they would receive over \$10,000 burial cost and in exchange the senior needed to pay \$40-\$100/monthly.

When the senior passes away and their family tries to collect on the agreement, they are informed that there was insufficient funds and that members were issued a public notice that of such. However, the fund continues to ask other seniors to continue to pay into the fund. When the mother (client) found about how her husband was cheated, she also tried to stop paying into the fund and was told that if she did so, she would get nothing in return. One of the senior's final dying wishes is to not be a burden on their family with such expenses and they scrimp and save every penny sacrificing their living hood to ensure their children will have a better life. We are assisting in recovering the funds for the family.

Optional Information on  
Collaboration with Other  
Advocacy Groups

On top of continual attack by the state governor to eliminate senior benefits by capping the state's share of In-Home Supportive Services (IHSS) workers' wages and benefits at \$8.60 per hour, the additional scrutiny of adult day health care service both on the center level and the consumers, has heighten concern as to whether seniors are being rushed out the door without sufficient/adequate home care. Nearly 370,000 IHSS workers help almost 450,000 low-income seniors and people with disabilities live safely in their own homes, thereby preventing more costly nursing home care. The state currently shares in combined IHSS wage and health benefit payments of up to \$12.10 per hour with counties and the federal government. In February 2009, state lawmakers reduced this threshold by capping the amount at which the state would share in the cost of IHSS workers' wages and benefits at \$10.10 per hour – \$9.50 per hour for wages and \$0.60 per hour for health benefits. In June, however, a federal district court issued a preliminary injunction prohibiting the state from implementing this reduction. This injunction remains in effect while the case is on appeal.

Despite this ruling, the Governor has proposed to cap the state's share of IHSS workers' compensation at an even lower level – the state's minimum wage of \$8.00 per hour plus \$0.60 per hour for benefits – effective June 1, 2010. Forty-five counties currently offer combined wages and health benefits that cost in excess of \$8.60 per hour. While counties could continue to provide compensation above the proposed level, they would have to use their own dollars to make up for lost state funding – a dim prospect, given that counties continue to face their own budget pressures.

On both areas, Asian Pacific Islander Legal Outreach has been asked to join in efforts to provide legal recourses in appealing the rights of the seniors. API Legal Outreach is prepared to represent seniors on the right to appeal and is the process of access the issue of eliminating adult day health care services. While there has been a decrease of capacity and increase of need for service, API Legal Outreach continues to monitor this issue and remain ready and available to address these issues in a legal

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capacity
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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco

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

Case Summary: A January 2010

A monolingual Senior Citizen on a fixed income attended La Raza Clinic because he was facing a \$10,000 penalty from the Social Security Administration (SSA). This Senior Citizen according to SSA had received an SSI overpayment. For months, Senior had to no avail attempted to appeal the overpayment on his own and was forced \$50 per month payments to pay back for this so called penalty.

Since he had already appealed he was limited to having a Social Security hearing in front of a judge but we successfully set up a meeting with a Case Worker at SSA. At the meeting the SSA Case Worker explained the hearing process, which would possibly take up to a year to have his case re-heard and there would be no guarantees of a favorable outcome. In lieu of another hearing the Senior Citizen decided to pay back his penalty, however, we were able to set up a payment plan with SSA, whereas his monthly payments would be reduced to \$25 per month which would directly be subtracted from his reinstated SSI.

Case Summary: BFebruary 2010.

Senior attended La Raza Clinic requesting assistance in regards to correcting his date of birth on his official United States documents. He had been under the impression that his date of birth was the date that appeared on the majority of his documents but unbeknownst to him it was the incorrect date, however, it was not until Social Security recently re-evaluated his file when applying for retirement benefits that they noted his actual date of birth. As a result, Social Security changed all his records to reflect the true but now he was faced with the dilemma of having all his other documents with the mismatching date. He soon became overly concerned that the mismatching dates would later cause him problems.

We assisted the senior with completing and submitting correction forms, however, despite providing several pieces of evidence, including a letter from Social Security acknowledging they changed the date, that illustrated the client was unaware that he was using the wrong date, the Department of Homeland Security Citizenship and Immigration Services denied his request. We approached Social Security once more and requested they assist us in this matter, thankfully SSA was willing to work with us in the process, and after several meetings and advocating on behalf of the client, SSA changed date of birth records back.

Case Summary: CMarch 2010

A monolingual Senior Citizen on a fixed income attended La Raza Clinic because she had received two violations from San Francisco Municipal Transportation totaling \$150. She had been cited by a San Francisco Police Officer who boarded the bus checking proper identification of the passengers. It so happened that on this day, she was not carrying her California Identification because she had lost it but was issued a receipt by the Department of Motor Vehicles in the interim. When she attempted to search for this document to show SFPD to prove her Senior Citizen Status; he was already citing her for two violations and had confiscated her Senior Pass stating that she did not appear to be a citizen.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

We assisted Senior Citizen in appealing these two violations; evading bus fare and misuse of a transfer. We provided her proper documentation as well as the all conflicting information from DMV and SFMT that qualifies senior for a fast pass. Unbeknownst to our client and us, in California one is considered a Senior Citizen at the age of 62 but for SFMTA passes, a senior must be 65 years. After several explanations and appeals to the hearing officer, her penalties of \$150 were waived.

We had a very exhaustive but productive third quarter. In addition to participating in regular monthly network meetings, community events, and senior gatherings which directly affect and assist our senior community; we increased our visibility and support for causes which affect our vulnerable community. In addition to showing our continued interest and support in the monthly meetings, such as, DAAS Commission, HealthCare Action Team, In-Home Support Services, Senior Housing Action Team, DAC-Latino Partnership as an avenue to seek out resources for our clients as well as show solidarity; we have also participated in the House Keys not Handcuffs and Affordable Housing March and Rally, the National AoA Conference and Senior Survival School.

As a program that continues to be committed in adamantly serving the most vulnerable community and due to the impact of the budget cuts affecting this community; we have continued to see an increase in the issues that a single senior client comes to us for assistance. Although, challenging due to increase in demand and low capacity, our Senior Law Program continuously strives to provide an effective service.

This past quarter, we contributed an article piece on Advance Health Care Directives for the latest issue of the Senior Rights Bulletin, and we look forward to featuring a senior profile for the next bulletin. Unfortunately, after so many years of holding a clinic at 30th Street On-LOK Senior Center, they have found that referring senior for our clinic is best use of their time and resources but instead our organizations are brainstorming ideas to provide presentations. We are in the process of re-creating a Memorandum of Understanding and working out the details of this new project.

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**Provider: Asian Law Caucus**

**Counties: City and County of San Francisco**

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

After much effort, we successfully demonstrated that USCIS wrongly denied our 65-year-old client's citizenship application without interviewing her. USCIS claimed that she had been sent a fingerprinting appointment and had denied her application for failure to attend the appointment. She was upset that after taking her \$675 application fee, USCIS did not even interview her. After we intervened three times, USCIS finally agreed to reopen her citizenship application and interview her.

We secured a grant of relief from deportation for a San Francisco resident whose 63-year-old wife needed him here to care for her due to multiple medical problems.

We won approval of disability waivers for six naturalization applicants, allowing them to use an interpreter at their naturalization interviews.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Listed

**PSA: 7**

**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa County**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 8**

**Provider: Legal Aid Society of San Mateo County**

**Counties: San Mateo**

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

None Listed

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Listed

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**PSA: 9**

**Provider: Legal Assistance for Seniors**

**Counties: Alameda**

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

LAS staff assisted a former guardianship client who needed to move to South Carolina to care for her ailing mother. The client was appointed as the permanent guardian of her granddaughter by the court in 2006 because the child's mother was unable to care for her due to alcoholism and the father was unknown. When the child's mother was notified by the court that our client wanted to move to South Carolina, the mother opposed the grandmother's petition to move out-of-state with the child, making our client's case more complicated. However, the mother never visited the child and had no alternative proposal for the minor's care if the minor could not move with her guardian.

LAS' Guardianship attorney assisted the client in preparing the necessary petition to move to South Carolina with her granddaughter and notifying all of the relatives that she is legally required to notify about the move. The court granted our client's petition and allowed our client to move so that she could care for her mother. Both the client and the granddaughter are now doing well in South Carolina, where they have many friends and relatives.

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 has been awarded contracts by 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**

**Provider: Fair Housing Law Project**

**Counties: Santa Clara County**

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

85 year old blind man with dementia was convinced to take out a refinance loan on his property. After filing a federal lawsuit on his behalf, FHLP was able to negotiate a \$225,000 principal pay-down of his mortgage and lowered his interest rate to a 5% fixed rate, plus \$40,000 in damages.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Senior Adults Legal Assistance (SALA)**

**Counties: Santa Clara County**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

For the Third Quarter of 2009-10, SALA provided on-site legal service intake appointments at 23 senior centers or community sites in Santa Clara County. These sites included: Palo Alto Senior Center, Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (in San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in downtown San Jose), St. James Senior Center (in San Jose), Alma Senior Center (in San Jose), Lola Williams Senior Center (in San Jose), Eastside Senior Center (in San Jose), Hank Lopez Senior Center (in San Jose), Campbell Adult Center, Willows Senior Center in San Jose, Kirk Senior Center (in San Jose), Almaden Senior Center (in San Jose), Evergreen Senior Center (in San Jose), Southside Senior center (in San Jose), CRC Senior Center (in 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.

For the Third Quarter of 2009-10, SALA attorneys also participated in meetings of the Elder Abuse Task Force of Santa Clara County and the Public Benefits Task Force. They also met with the staff of the Probate Court in February to discuss protocols for Elder Abuse Restraining Orders heard in Probate Court. SALA's Directing Attorney and Supervising Attorney worked with representatives of Cooley Godward and Kronish, a Palo Alto law firm, to establish protocols for pro bono attorneys at Cooley to begin representing SALA clients at Elder Abuse restraining order hearings in Probate Court. They also worked out details for an MCLE training on March 12 presented by SALA's Supervising Attorney (see above) for pro bono attorneys at Cooley that might be interested this pro bono opportunity. SALA's Directing Attorney and Supervising Attorney also met with representatives of Fenwick and West, a Mountain View law firm, to discuss possible pro bono collaborations using Fenwick attorneys to provide services to SALA clients.

**PSA: 11**

**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**PSA: 12**

**Provider: Catholic Charities**

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu**

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

None

Optional Information on  
Collaboration with Other  
Advocacy Groups

None

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz and San Benito**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 14**

**Provider: Central California Legal Services**

**Counties: Fresno, Madera**

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

Social Security/SSI disability  
Unskilled worker 62 years of age was denied Social Security/SSI disability benefits in 2008. Assisted client with evidence gathering, merit assessment, advice on legal options, and represented client at a disability hearing in February 2010. Outcome was favorable. The client will receive monthly cash benefits, plus Medi-Cal and a sizeable back benefit cash award. Note that these benefits not only greatly improve the client's quality of life, but also represent a substantial return of state and federal tax dollars to the community.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 15**

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**Provider: Central CA Legal Services, Inc**

**Counties: Kings County**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Sarah Shena**

**Counties: Tulare**

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

•On 2/26/2010 our first Volunteer Attorney Recognition Dinner was held, with the AAA Director in attendance.

•On 2/16/2010 a staff person with social work experience was added to the office (we now have one attorney and one support person on staff).

Optional Information on  
Collaboration with Other  
Advocacy Groups

United Way of Tulare County: I now serve as immediate past-president but my collaboration with this organization continues as previously reported. In particular, the 2-1-1 Information line opened in Tulare County this quarter, and I have been active in assuring that Senior Legal Services and related services for elders are appropriately listed in the referral databank.

Porterville Adult Day Services (PADS): In addition to collaboration previously discussed, this quarter I began planning a workshop for Caregiver Training with the PADS Executive Director.

Other: All other collaboration described this fiscal year continues

**PSA: 16**

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Provider: California Indian Legal Services

Counties: Inyo and Mono

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

Case #1: Client had been sole and long-term caregiver to her husband. Client's husband passed away from cancer in September 2009. While our client was providing long-term care to her husband, client was not attentive to all of her legal affairs including pursuing any public benefits she may be entitled to receive. Client reported that there was an outstanding credit card debt of over \$ 10,000 that belonged to her late husband. There were many financial shifts in her situation due to her the loss of her husband. After careful review of Client's situation, we were able to educate the Client on California community property law regarding debts of spouse's pass to surviving spouses. We sent a letter to Social Security Administration (SSA) on Client's behalf inquiring why SSA had erroneously taken her husband's final SSA benefit check during 2009. Client's husband passed away mid-September and the October SSA payment rightfully should have been given to Client. We also requested Lump Sum Death Benefits and an interview for Client to apply for Widow's benefits with the SSA. As of March 2010, Client reported that SSA refunded the October 2009 SSA benefit check she was entitled to; received lump sum death benefits and retroactive Widow's benefits totaling about \$ 6,000. All of these benefits were due to the Client. Client is very grateful for the assistance we were able to provide.

Case #2: Client is an elder tribal member widow who came to our office for assistance in dealing with collection agencies that were demanding payment on a debt. Upon gathering the facts of Client's case, it was determined that the Client was unable to afford any payments to the creditor. We drafted a ghost letter pursuant to the Fair Debt Collection Act advising the collection agency to cease contacting the Client about this debt and explained her financial situation to the creditor. If the Client's financial situation should improve she would be willing to make payments on the debt. Client is relieved to know that the harassing letters and calls will stop.

Case #3 A recently widowed Client contacted us with a question on her rights to sell her home without the State Medi-Cal office placing any restrictions (i.e. liens) on the sale. After conducting research on the issue we advised the Client that since she is the surviving spouse of a Medi-Cal beneficiary who has resided in the home during the time he received Medi-Cal benefits, the State Recovery Unit could not place any encumbrances on her home if she chooses to sell it. It is only after the Client passes away that the State can then place a claim against the estate. Client was pleased with this legal information and reported that she has an interested buyer and is hopeful she will sell the property and can move to be closer to her family.

Optional Information on  
Collaboration with Other  
Advocacy Groups

IMSLP retains an active role on the local area agency on aging Advisory Council and a local grassroots senior services group known as the Frail and Elderly Taskforce. HICAP and the Ombudsman are regular contacts whether for updates or discussion of state budget and program services.

PSA: 17

**California Legal Services (Title III B)**  
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**Provider: Central Coast Commission For Senior Citizens**      **Counties: Santa Barbara County and San Luis Obispo County**

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

Optional Information on Collaboration with Other Advocacy Groups

**PSA: 18**

**Provider: Grey Law of Ventura County**      **Counties: Ventura**

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

Optional Information on Collaboration with Other Advocacy Groups

**PSA: 19**

**Provider: Center for Health Care Rights**      **Counties: Los Angeles**

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

Optional Information on Collaboration with Other Advocacy Groups

**California Legal Services (Title III B)**  
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**Provider: Bet Tzedek Legal Services**

**Counties: Los Angeles County**

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

Optional Information on  
 Collaboration with Other  
 Advocacy Groups

**PSA: 20**

**Provider: Inland Counties Legal Services, Inc.**

**Counties: San Bernardino County**

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

Client contacted ICLS about a Will/Advanced Health Care Directive. Client was terminally ill and needed them done immediately. Client was upset because she had waited so long to do the things she knew she should have done "a long time ago". ICLS took the information over the phone and prepared the Will/Advanced Health Care Directives. ICLS made a home visit so the client could review and sign the documents. Client said she was very relieved to know that ICLS was able to do this for her in so little time.

Client is 63 years old, deaf, and partially sighted. Intake was done through a relay where client and interpreter were on video link using ASL while advocate and interpreter were speaking on the phone. Client's husband participated in the interview. He is also deaf and communicated through interpreter using ASL. Client's main reason for calling was to find out why she was denied Social Security disability. It was determined that she was not eligible and that was explained to her. However, when asked if the family was receiving Food Stamp benefits, client said no, as a worker told her they were not eligible. After review of the household size and total income, advocate believes they are in fact eligible to receive Food Stamp benefits. Advocate sent client a written explanation regarding SSDI and also an explanation regarding Food Stamps with a link to the online application. Advised client to apply and if denied, advised client to contact ICLS again for possible representation.

Optional Information on  
 Collaboration with Other  
 Advocacy Groups

None Listed

**PSA: 21**

**California Legal Services (Title III B)**  
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**Provider: Inland Counties Legal Services Inc.**

**Counties: Riverside**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 22**

**Provider: Legal Aid Society of Orange County**

**Counties: Orange**

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

We recently represented an 81 year old Holocaust survivor in obtaining an Elder Abuse Restraining Order. Obtaining the order allowed the client to leave the nursing home where she was living and return to her mobile home.

Optional Information on  
Collaboration with Other  
Advocacy Groups

1. Attended UCI Law School Pro Bono Placement Program. Subsequently had 4 UCI law students work with our program during the spring semester.  
2. Met with staff, volunteer attorneys and representatives from Orange County Mental Health and the Orange County Task Force on Hoarding to discuss ways to work together to address problems in eviction and homeowner Code violation cases.

**PSA: 23**

**California Legal Services (Title III B)**  
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**Provider: Elder Law & Advocacy**

**Counties: San Diego**

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

The senior was a low-income senior, and his only source of income was Social Security. He contacted Elder Law & Advocacy because of a problem he was having with his bank. The bank had removed \$100.00 from his bank account, and had denied access to the other money in his account. After reviewing senior's records, it was discovered that the bank had frozen senior's account because of a judgment against client for an old debt.

The money that had been frozen was senior's Social Security funds that had been directly deposited into the bank account. The senior was experiencing significant hardship because he could not access his Social Security funds. An Elder Law & Advocacy attorney prepared a letter and was sent to the bank to remind them that Social Security funds are exempt from collection. The Elder Law & Advocacy attorney demanded that the senior's accounts be unfrozen. The bank removed the hold on the account and promptly refunded the \$100.00 they had removed from the account

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 24**

**Provider: Elder Law & Advocacy**

**Counties: San Diego**

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

Not Applicable for the Period of 1/1/2010 -- 3/31/2010

Optional Information on  
Collaboration with Other  
Advocacy Groups

Not Applicable for the Period of 1/1/2010 -- 3/31/2010

**PSA: 25**

**California Legal Services (Title III B)**  
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**Provider: Bet Tzedek Legal Services**

**Counties: Los Angeles City**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 26**

**Provider: Senior Law Project, Inc**

**Counties: Lake and Mendocino Counties**

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

Obtained waiver of a substantial SSI overpayment for elderly couple. Social Security Administration agreed to refund amounts recovered prior to waiver. Case involved numerous due process violations by SSA.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Senior Law Project has provided legal support to HUD certified foreclosure prevention counselors at California Human Development Corporation and received referrals of clients from that agency. Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties. Senior Law Project attorney attended the annual conference of CICA (California IHSS Consumer Alliance) and reported on the conference to both Lake and Mendocino IHSS Advisory Committees. The Senior Law Project attorney participated in a strategic planning retreat with the Mendocino IHSS Advisory Committee to establish goals and priorities for the current year. Senior Law Project continues to collaborate with California Advocates for Nursing Home Reform and other advocacy organizations in connection with the issue of improper eviction from residential care facilities. The advocacy is focused on development of new regulations for Community Care Licensing applicable to RCFE evictions

**PSA: 27**

**California Legal Services (Title III B)**  
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**Provider: COUNCIL ON AGING**

**Counties: Sonoma**

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

Senior Housing Assistance – Assisted client in securing continued housing subsidy where benefits were at risk.

HUD Housing Assistance – Client received a 3-day notice to pay rent or quit. Spoke to management company to waive late fee, fix leak in bathroom and waiver of the 3-day notice.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Collaborate with Empire College School of Business – Paralegal Certificate Program. Work with paralegal students to assist with client interviews and document preparation at Senior Legal Clinic at Petaluma Senior Center once a month (2nd Monday from 2:00 to 4:00 PM).

**PSA: 28**

**Provider: Legal Services of Northern California**

**Counties: Solano County**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued collaboration with Ombudsman Service of Northern California and Senior Legal Hotline. Continued participation in FAST, Solano Senior Coalition, and Vallejo Senior Roundtable.

**Provider: Legal Aid of Napa**

**Counties: Napa**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 29**

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

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**Quarter: 3**

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**Provider: Senior Legal Services**

**Counties: El Dorado County**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 30**

**Provider: California Rural Legal Assistance, Inc.**

**Counties: Stanislaus**

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

Senior in mid-80s had a problem with her home alarm. Eventually, she stopped using it, but she continued to be billed for it. When she tried to cancel, she faced a sizable cancellation charge. She became physically ill, including chest pains. Advocate wrote to the alarm company reciting the history and indicating that their conduct was borderline elder abuse. Alarm company zeroed-out her balance and cancellation charge. This senior is relieved.

Senior lives in senior apartment complex. She receives IHSS, Social Security, a small pension, VA benefits, and subsidized housing. She receives medication by mail, as well as other time sensitive mail. When the management initiated a policy to lock the clubhouse on Saturdays, she was locked out of her mailbox. Advocate wrote a "reasonable accommodation" letter. Management reconsidered and the clubhouse is now open on weekends. This senior is delighted.

Optional Information on  
Collaboration with Other  
Advocacy Groups

2/2/2010 Attended STOAAC meeting – estimate 33 attendees  
The Services to Older Adults Advisory Commission is a networking meeting that involves staff from the AAA and the programs associated with the AAA. Also in attendance are staff members from assisted living and skilled nursing facilities, representatives from the local hospice organizations, and staff members from organizations that market to and serve senior citizens and their caregivers. Each organization is given the opportunity to state their purpose and current status, offering the various attendees information that will aid them in their particular mission.

3/3/2010 Attended STOAAC meeting – estimate 35 attendees  
See description above.

**PSA: 31**

**California Legal Services (Title III B)**  
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**Provider: Central California Legal Services**

**Counties: Merced**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 32**

**Provider: Legal Services for Seniors**

**Counties: Monterey**

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

Medicare had stopped paying for client's medications. Client, a 67-year old on a fixed income social security pension, was on life-long anti-transplant rejection for a kidney transplant he had received approximately 18 months earlier. Medicare's refusal to cover his drugs meant that client, on his fixed income, would not be able afford his anti-rejection drugs and was suffering the real threat of death. Client had been without his medication for five days when he came to Legal Services for Seniors. Our legal advocate was able to spend time with Medicare, finding out Medicare had incorrectly stopped coverage. Our advocate got coverage restarted immediately, and client was able to continue with his anti-rejection medications, ensuring he would not die from kidney transplant rejection.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 33**

**Provider: Greater Bakersfield Legal Assistance, Inc.**

**Counties: Kern**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups