

Frequently Asked Questions About Masonic Senior Outreach Services

For a more detailed overview about accessing Masonic Senior Outreach Services, visit masonichome.org.

1. What is Masonic Senior Outreach Services (MSOS)?

MSOS provides **free** assistance to Masonic family members age 60+, connecting clients with the services and resources they need to stay healthy and safe at home or in their home community. MSOS is direct relief, one of the oldest forms of Masonic charity, provided on behalf of every California Mason.

2. What kinds of services does MSOS provide?

- **Information and referral services** are available through Masonic Assistance. MSOS can offer telephone guidance and assistance to obtain various resources, benefits, and services in a member's community like home care, referral agencies, legal services, or financial management.
- **Ongoing need-based case management** is provided for clients who face isolation or declining health and cannot otherwise afford to hire a care manager or geriatric social worker. MSOS care managers maintain regular visit schedules and/or telephone contact to continually assess financial situation, health, social, mental, and living conditions.
- **Financial assistance** to meet basic needs is available for those who demonstrate need and qualify.

MSOS does not provide home care, transportation, or legal services. MSOS can help refer you to services and providers in your local community if you need assistance. MSOS is unable to provide information about Masonic-owned service providers or providers who are Masons.

3. I'm not sure if my needs fall under the service categories above. What should I do?

MSOS understands that every individual and family situation is unique and is committed to assisting you in any way possible. Contact Masonic Assistance at **(888) 466-3642** or by completing the online request for information form at masonichome.org and MOS staff will do their best to help.

4. Who is eligible for MSOS?

Applicants must be 60 years or older.

- **Even without a Masonic affiliation:** You may receive information and referrals by Masonic Assistance at **(888) 466-3642** or by completing our online request for information form.
- **California Master Masons in good standing or their wife, widow, or mother:** You may also apply for case management.
- **California Master Mason in good standing for five or more consecutive years, or their wife, widow, or mother (in extraordinary circumstances):** In addition to the above, you may be eligible for financial support to meet your basic needs.

To apply for MSOS financial assistance, applicants must also demonstrate financial need; receive all community, state and federal benefits to which they are entitled; and cannot require skilled nursing care or home care that exceeds 21 hours per week.

The following may access information and referrals, but are not eligible for financial support:

- California Master Masons who have been in good standing for less than 5 consecutive years.
- Master Masons from out-of-state (including sojourners) who never affiliated with a CA lodge.
- Adult children, grandchildren, remarried widows (current husband is not a Mason).

5. I know an elder brother who may benefit from support, but the Mason is ill or unable to call. Can his wife call?

Yes, MOS works with all members of the family.

6. How do I make a referral to MSOS?

- Call the Masonic Assistance office at **(888) 466-3642**.
- When calling to make a referral for someone other than yourself, it is important to have that person's permission to make the referral.
- The best process is to have the person needing assistance make the call, or be with you when you call. This allows the person needing assistance to be involved with the process from the start.
- Be prepared: In-depth intake calls take anywhere from 30-60 minutes.

7. Does MSOS provide emergency financial assistance?

- When emergency financial assistance is required, MSOS will refer the caller back to the home lodge.
- The application process requires approximately 30 – 60 days for the applicant to gather the needed documentation and for MSOS to process and submit the application for financial approval.

8. If I receive financial assistance, do I have to repay it? How do I facilitate repayment?

MSOS clients **who have assets and receive financial assistance** are required to sign an Agreement to Repay, which states that the client agrees to repay MSOS when assets are available (including property, life insurances, inheritance, etc). This financial assistance provided by the MSOS program is structured as a loan, so the income does not make the client ineligible for other services and programs. If the client has no assets, MSOS does not require repayment.

9. Will I have to sign over my home in exchange for MSOS?

As part of your application, you must provide information regarding all properties and resources, including life insurance policies, investments, bonds, etc., as this will need to be assessed prior to receiving financial assistance from MSOS. If you are approved for financial assistance and you own real property, a Deed of Trust or Secured Interest on that property will be placed. When you sell your property, or pass away, the MSOS program will be repaid **ONLY** for funds expended upon your care.

10. What if I need financial assistance but I live with family or friends?

MSOS financial support will only be extended to cover your and/or your

dependent family's (spouse and dependent minor children) share of costs. All household members are expected to contribute to living expenses. The MSOS client's share will be determined by dividing household expenses by the number of occupants.

11. How long does the MSOS application process take? How will I be notified about the status or outcome of my application?

The time varies according to your circumstances and the timely submission of all requested documents. On average it can take one to three months. Once completed, application materials are reviewed then submitted. Notifications are conducted by telephone and U.S. mail. As a final step in the application process, a home visit with an MOS manager will be conducted.

12. If I am also applying the Masonic Home – is it the same application and when am I placed on the waiting list?

Applications for MSOS and Masonic Homes are the same with a couple of minor additions. As soon as the first phase of the application is received, you will be placed on the waitlist, but you will not move up the list until your application is returned (which is the second phase of the application).

13. Do I have to provide my Social Security number (SSN) on the application form?

If you are only applying for MSOS you do not need to provide your SSN; however, if you are also applying to the Masonic Homes, your SSN is required.

14. What are some reasons an application may not be approved?

Incomplete paperwork, such as a lack of documentation regarding financial need and current circumstances, or an unsigned form are two reasons. If an applicant has transferred any financial resources or property to family or friends within the past three years, he or she could be rendered ineligible for financial assistance.

15. Who is not eligible for financial assistance through MSOS?

Master Masons of less than 5 years, Masonic children, grandchildren, remarried widows (current husband is not a Mason), and Master Masons from out-of-state who never affiliated with a CA lodge are all ineligible for financial support. Information and referrals are available to any caller.

16. If I am also applying to the Masonic Homes, when will I be placed on the waiting list?

Once a completed application has been submitted to Masonic Assistance, and then sent to the appropriate home. Until this time, you are not on the waiting list.

17. What if I need an attorney/in-home care/transportation services? Does MSOS offer these services?

MSOS will be glad to help you research and locate this type of service in your community, but it is up to you to determine which agency to work with. MSOS does not provide these services.

18. What are the hours of operation for MSOS?

The Masonic Assistance office answers calls from 9 a.m. – 4 p.m. daily. Each intake call takes up to 60 minutes so if you receive a voice message, please leave your call back number and someone will call you back within 24 hours. Masonic Assistance can be reached at (888) 466-3642.