

2024

Masonic Senior Outreach Services

(MSOS)

Client Handbook



Masonic Homes
of California

MASONIC OUTREACH SERVICES

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MISSION STATEMENT

In keeping with the tenets of Freemasonry, the Masonic Homes of California (MHC) will strive to promote the quality of life by empowering our members, their families, and our communities to live well and to achieve meaningful and rewarding lives. We seek to profoundly improve the lives of those we serve by providing cutting-edge solutions to the challenges faced by Masons, their families, and our communities.

WELCOME

As a recently approved recipient of MSOS financial support and case management services, a care manager (CM) will be assigned to you. Your assigned CM will serve as your primary contact person while you are a MSOS client. He or she will work closely with you to navigate issues you may be experiencing, manage the processes associated with those issues, provide resources where they can, and answer questions you may have. You and your CM should maintain consistent communication by phone and regular visits while you are participating in the MSOS program. However, please be mindful that you are responsible for managing your overall health and well-being and should immediately notify your CM if there are any changes in your financial, health, or emotional state in order that they may be able to assist you.

Your CM is _____

Direct Line Your CM is _____

Email Address Your CM is _____

Fax Your CM is _____

CONFIDENTIALITY AND PRIVACY

MSOS only collects personal or confidential information to the extent necessary to provide services to you, which may include your personal health and finance information. This information is only collected for purposes of ensuring MSOS is able to serve your current needs and MSOS staff may contact you for clarification regarding this information during the intake process or participation in the MSOS program if your service needs or financial circumstances change. MHC maintains the confidentiality of your personal information which will only be shared with third parties with your authorization. All MOS clients are presented with an Authorization to Disclose Personal Information at the time of intake and are presented as Attachment A to your Program Agreement. If you wish opt out of such authorization, you may sign the Request Not to Disclose Personal Information form also presented during the intake process. MOS and MHC will adhere to its Privacy Policies and Procedures and pursuant to your authorizations. If MHC or MOS has a legal duty/reporting obligation to protect and promote your health and safety, MOS staff members may share information as consistent with those obligations MSOS staff members can answer any questions you may have about collecting or sharing your information as necessary to best service your needs.

HOME VISIT SAFETY ACKNOWLEDGEMENT FORM

MSOS prioritizes staff and client safety during home visits. Clients must sign the Home Visit Safety Form and adhere to the safety protocols outlined in the acknowledgment which are designed to minimize risks of accidents, injuries, or other adverse events during home visits. Our goal is to establish an environment that promotes your well-being and upholds the professionalism of our staff.

MASONIC SENIOR OUTREACH SERVICES PROGRAM AGREEMENT

All MSOS program clients are required to sign the MSOS Program Agreement. This Agreement outlines the acceptable and required expectations of MSOS clients. Violation(s) of the terms in the Agreement may lead to a corrective action plan to maintain adherence to the program guidelines. If the violation(s) of the terms in the Agreement is persistent and is not resolved by the corrective action plan, then this may lead to suspension and/or termination from the program as determined by the CEO of MHC.

Additionally, you will be asked to sign a 'Program Agreement Extension' form each year to recertify your eligibility to maintain enrollment in the Program. Please read through each item carefully and consult your CM directly if you have questions. If additional questions arise that cannot be answered by your CM, please reach out to your CM's manager for further support. If further assistance is needed, please contact the MOS Director.

METHODS OF SECURING REPAYMENT

By signing 'The Masonic Senior Outreach Services Program Agreement', you have agreed to repay MSOS for the total amount expended for your care and on your behalf to the extent of your available assets. As detailed in the Program Agreement, your obligations to repay MSOS are only triggered when and if you have liquidated assets that are or become available. For example, if you (or your spouse, if applicable) receive an inheritance, litigation settlement payment, become financially independent, etc., you will be required to repay MSOS in a manner that does not jeopardize your stability or when/if your secured assets have been liquidated. If you are able, repayment will be in full. If your assets are less than what MSOS has expended on your behalf, then you are only required to pay what you can. No interest is charged, and you will only be assessed for a dollar amount equal to or less than the amount of support provided by MSOS.

Additionally, by signing the 'The Masonic Senior Outreach Services Program Agreement' form, you agree to allow MHC to take a security interest in the assets described in the form so that MHC may reimburse itself. The program will provide you with a monthly statement for your ongoing financial support that reflects the total balance owed.

Examples of Securing Repayment

My Home Is My Asset

If you are in the process of selling your home while receiving assistance from MSOS, we will simultaneously support your new residence and your previous residence for a limited period of time up to the budgeted amount. The goal is to sell your home quickly and on an "as-is" basis. If your home has not been sold after two months, MSOS will require a decrease in the selling price until your home is sold. If it becomes clear that your home may not sell due to its condition, poor economy, or any other reason, MSOS will consult with you and the MHC finance team to determine the next course of action.

Upon the sale of your home, the proceeds will be used to repay MSOS to the extent MSOS has expended on your behalf. If there are excess funds remaining after repayment and you continue to require assistance from MSOS, you will work with your CM to create an acceptable plan and budget to spend down your assets to be considered eligible to receive further financial assistance from MSOS.

Deed of Trust

In order for MSOS to take a security interest in your assets, clients must execute certain documents to ensure that MSOS can seek reimbursement for services provided through the Program if and when assets are available. These documents are a way of ensuring there is a legal process in place for MSOS to be repaid only for the services extended to you. As a reminder, the MSOS Program can continue to provide financial assistance throughout your life without requiring immediate repayment.

Reimbursing the program for services provided enables MSOS to continue care for other seniors in similar situations.

If My Life Insurance Policy Is My Asset

If you have a life insurance policy, you must list MHC as the owner and beneficiary to remain eligible for MSOS financial assistance as described in the Program Agreement. MHC will pay the required premiums. If it is determined that the policy is worth less than the cost to maintain it, you will work with your CM to liquidate the policy. You will use any lump sum payments made to you to reimburse MSOS. If there are excess funds remaining after repayment, you will work with your CM to create an acceptable plan and budget to spend down your assets.

Other Assets

If you have an asset that was not described above, please speak to your CM directly about liquidation and/or MSOS support options.

YOUR BUDGET ON MSOS

Following a review of your monthly expenses at the time of application, a budget will be created for you at the time of application. As a needs-based program, we do not guarantee that we will be able to maintain your previous/current lifestyle. Your budget will include basic necessities such as rent, food, personal care costs, utilities, health-related expenses, and other similar items. Support for any additional items will be modest to maintain longevity of the MOS Program.

Your Stipend

After your budget is created, the total amount of your monthly expenses is subtracted from the amount of your monthly income to determine your stipend amount. For example:

Mrs. Smith's monthly budget:

Income:	Expenses:
Social Security	Rent
\$1000	\$2,500
Pension	Medications
\$500	\$100
	Personal expense
	\$100
TOTAL INCOME	TOTAL EXPENSES
\$1,500	\$2,700

\$2,700 (total monthly expenses) - \$1,500 (total monthly income) =

\$1,200.00 (MSOS stipend)

How will I receive my stipend?

When possible, MSOS pays stipends directly to vendors (e.g., apartment managers, assisted living facilities). In the above example, Mrs. Smith's facility will receive \$1,200 per month directly from MSOS.

Will I Have To Pay Rent If MSOS Is Paying My Rent Directly?

Yes. Typically, the MSOS stipend amount is less than the total amount of rent due each month, leaving a balance owed. This rent balance will be your responsibility each month.

What If I Fail To Pay My Rent Portion and/or Other Bills?

As an MSOS client, you and/or your Power of Attorney (POA) are responsible for managing your budget. If you mismanage your budget and fail to pay your rent portion and/or monthly bills and begin to incur debt, it will remain your financial responsibility and may result in suspension or termination from the program. MSOS will only provide you with a stipend each month; MSOS will not provide additional financial support to help decrease such debt incurred for failure to pay bills that are due and payable. If you do not select this option, and you have a pending eviction due to non-payment of rent, MSOS may suspend or terminate you from the program and refer you to Adult Protective Services, the Ombudsmen, your designated POA, or family member, etc., for assistance.

What if my income increases? Does my MSOS stipend remain the same and does this mean more pocket money for me?

If your income increases for any reason (e.g., Social Security increase, VA benefits) please notify your CM immediately and your budget will be updated to reflect the new amount. This may result in a decrease in your MSOS stipend. MSOS is a program that is designed to *supplement* your income. If, at any time, you can bear more of the financial responsibility of paying for your monthly expenses, you are expected to do so.

What if I experience an increase in my monthly expenses?

Each line item in your budget reflects a three-month average cost of that expense. By doing so, it enables you to manage minor fluctuations in costs that occur from time to time. However, if you are experiencing a consistent and substantial increase in one or more of your expenses, please contact your CM immediately. Your CM will review your bills and will work with you to adjust your budget accordingly.

What if I experience a decrease in my monthly expenses?

You are required to report consistent decreases to your CM. MSOS is a charitable program that only provides support for what is necessary. By reporting decreases in your expenses, the amount of financial support MSOS provides will decrease accordingly and this money will be used to support others that are in need.

Paying bills directly

To minimize the amount of bills that you manage, MSOS can pay your bills directly. You will continue to be responsible for your bills, however your CM will be an authorized recipient of a copy of your bills. This will assist your CM to monitor your bills to ensure timely payment. If there are billing issues your CM will handle this directly with the vendor.

Please note that when bills are paid directly by MSOS, these expenses will be omitted from your monthly budget and your stipend will decrease. If you are concerned about the decrease, your CM can provide further clarification.

Personal expense money

Personal expense (PE) money is a line item that MSOS includes in your monthly budget. PE money is what MSOS considers “pocket money” and MSOS allocates a modest amount to each client per month. It is used for social activities, clothing, dining out, hobbies, and other related items and activities. It can also be used to pay for expenses that MSOS would not otherwise be able to support such as those mentioned in the section on [extraordinary expenses](#).

Support for prescription medications

Prescription medications may qualify as reimbursable expenses through MSOS and must be submitted to your Care Manager monthly to remain eligible for reimbursement. You have the option to provide either individual receipts for each

medication purchase or present an itemized summary that includes comprehensive details about the prescribed medications. Reimbursement will be provided via a check being mailed to you or by direct deposit into your bank account. This ensures a streamlined and efficient process for reimbursement, facilitating accurate record-keeping and timely financial support for your healthcare needs.

Support for OTC/Supplements

MSOS can provide financial support for certain OTC/Supplements up to a designated dollar amount without requiring a physician's authorization. In some circumstances, the amount of MSOS financial assistance can be modestly increased if accompanied by a physician's recommendation. To ensure accurate and timely processing of your support request, it is essential to provide your Care Manager with receipts, allowing for a comprehensive inclusion and calculation of your expenses in your budget. This transparent and collaborative approach ensures that your financial support aligns closely with your healthcare needs and that any additional financial assistance warranted by medical documentation is duly considered.

SPENDING DOWN

If you build a "financial cushion" in your checking account that is more than \$2,000 (single individual) or \$3,500 (couple), you will be expected to spend some of this money. A financial cushion is the amount of money that is in your checking account after all monthly bills have been paid. Having more money in your account than the amounts noted above may also negatively impact your eligibility to receive benefits from some county, state, and federal programs.

It is also important to proceed cautiously in how you spend down a financial cushion. How you spend down may adversely affect your eligibility for MSOS and/or some county, state, and federal programs. For example, gifts of money or assets, guaranteeing the debt of another may be viewed as a disqualifying event that could result in ineligibility or suspension from MSOS and/or similar programs.

It is strongly suggested that you work with your CM to determine a suitable amount of money to spend and the appropriate method to spend down the money.

We understand the hesitation to spend down your financial cushion. Often, there is a feeling of security when there is a cushion in your bank account. As a reminder, MSOS supports most extraordinary expenses and/or emergency expenses. This should help to alleviate some concern.

Can I spend my money in any way I want?

Because spending down affects your eligibility for MSOS and some county, state, and federal programs, please discuss this with your CM. Typically spending down requires that you apply the funds toward your own reasonable and conservative monthly expenses. Spending down that results from gifting assets or money, guaranteeing the debt of another, or other transactions lacking in financial transparency, may affect your eligibility for MSOS and/or some county, state, and federal programs. If you anticipate an extraordinary expense and would rather spend down your financial cushion toward this, please speak to directly to your CM.

EXPENSES Outside of Your Budget

At times, expenses will come up that are outside of your monthly budget. These expenses are difficult to predict and therefore are not included in your monthly budget. Examples of these types of expenses include, but are not limited to costly dental procedures, eyeglasses, hearing aids, and other related items. To determine the average cost for the requested item, you may be asked by your CM to obtain three estimates to assure that the most cost-effective option is identified.

Pre-approval process

You are expected to notify your CM as soon as you anticipate the need for an expense that is outside of your monthly budget. This allows your CM to identify and/or explore cost effective resources and seek pre-approval on your behalf. Once your CM has obtained approval, you will be notified and can then move forward with your request. If you pay for an expense without seeking pre-approval and submit a reimbursement request, your request may not be approved and/or receive reimbursement less than what you first paid. This would be based on the average cost for the expense you are requesting and determined within MSOS Program staff discretion.

What if MSOS does not approve my request?

MSOS does not guarantee that all requests will be approved. If your expense is not approved, you may want to re-evaluate your bank account balance to see if you can afford it on your own. If you are not fully using your PE money each month, at times, you may find that you have built a financial cushion in your account and can use this money to pay for this expense. If not, you may want to think about using your monthly PE allotment toward this expense. Another option is to seek help from your family, friends, lodge, or another resource.

How do I seek pre-approval for an emergency or after normal business hours?

We understand that emergencies happen sometimes. If you are experiencing an unavoidable emergency and must move forward immediately with an expense, you must make your CM aware of the emergency via phone or email. If your CM is unavailable via phone, it is important that you leave a message to explain the emergency. Your CM will respond as soon as they are able and will request reimbursement on your behalf upon receipt of supporting documentation. Expenses are usually reimbursable if the cost of the expense is within reason, the expense is determined as a necessity, and proper notification of your CM is made via phone and/or email. MSOS may not approve your reimbursement if one or all the above conditions are not met or under other circumstances as determined by MSOS Program Staff in their sole discretion.

DEBT WHILE RECEIVING MSOS SUPPORT

As outlined in the MSOS Program Agreement, MSOS clients are prohibited from incurring certain debt while participating in the program to remain eligible for MSOS assistance. The MSOS Program provides financial support for necessities such as shelter, food, basic utilities, and access to medical care and medications but does not support unnecessary expenses. We understand

that this may mean a significant lifestyle adjustment for some program participants. However, incurring certain debt while receiving MSOS support to maintain a previous lifestyle is considered a violation of the terms of the MSOS Program Agreement as incurring debt will impact on the client budget and financial well-being. During your participation in the MSOS Program, MSOS will run an annual credit

check during the recertification process or when deemed necessary. If debt is incurred in addition to necessities routinely supplemented by MSOS, you will be responsible for the repayment of this debt. Your Personal Expense money as outlined in your budget will be garnished to repay the debt. Your MSOS


budget will not be increased to pay down this debt. Incurring additional debt, such as opening a line of credit or taking out a personal loan, may affect your eligibility to remain on the Program and may subject you to potential suspension or termination from the Program.

What if I have debt prior to my approval for MSOS? How does this get paid?

MSOS will not pay any previously incurred debt down and/or increase your budget to pay such debt. If you experience harassing phone calls from creditors, please contact your CM for assistance with responding to each creditor. The response may include statements that you are unable to pay the debt or are “judgment proof” because you receive charitable assistance which should not be subject to garnishing. Your CM will assist you in determining whether bankruptcy is an option for you. You may elect to use your personal expense money to pay a debt. It is recommended that you consider this payment's impact on your financial status and consult your CM in making this determination.

MSOS SUPPORT FOR AUTOMOBILES

MSOS may support automobiles and related expenses. Support depends on several factors such as condition of the car, alternate transportation options, and ability or safety concerns. If you receive MSOS support for your automobile, you must maintain a valid California driver's license, full coverage auto insurance, and any related expenses to the automobile must remain modest and reasonable including any monthly lease or purchase payments. If/when the cost to maintain your car exceeds the value of your car, MSOS may terminate support for the vehicle and your CM will assist you with identifying safe and suitable transportation alternatives.

MSOS does not typically support automobiles if you are living in an assisted living facility or board and care home because transportation is provided by the  community.

Car insurance

Accidents happen. If the cost of your insurance increases due to a ticket or an accident, MSOS will re-evaluate our ability to support this cost at the increased rate. The MSOS client may need to use their PE money to pay for the difference, and this determination will be made case-by-case at the sole discretion of MSOS Program Staff.

MEDI-CAL AND OTHER BENEFITS

MSOS clients are expected to apply for all federal, state, and community programs for which they may be eligible. Programs include Medi-Cal, Supplemental Security Income, Cal-Fresh, VA benefits, energy assistance programs, In-Home Supportive Services, and other related benefits. This list is not exhaustive and there may be additional programs for which you are eligible. Your CM will assist with any necessary research and pursue all resources available to you.

APPOINTMENT OF REPRESENTATIVE

It is suggested that you appoint your CM as your representative and give consent to allow your CM to speak directly with vendors and other service providers to complete applications on your behalf (e.g., Medi-Cal, discount programs, federal and government programs) and to facilitate a coordination of benefits or other support or placement as needed. Your active cooperation allows your CM to help manage the application process, including any follow-up that is necessary, while keeping you involved in the process and obtaining your assistance and consent when needed.

CONTACTING YOUR LODGE

MSOS Program Staff and your CM will remain conscious of confidentiality concerns and will not disclose any protected health information without your authorization. As a participant in this program, your lodge is made aware of your application for MSOS and your approval as an MSOS recipient. Sometimes your CM may contact your lodge and request financial support for an extraordinary expense on your behalf. You will be notified when lodge support is requested. If there are concerns regarding this process, please discuss it directly with your CM.

ANNUAL RECERTIFICATION

Recertification is completed each year on or near the anniversary date of your initial approval for MSOS. This process enables MSOS to update your information in our files and to confirm your continued eligibility for the program. During recertification, you will verify with your CM your income and monthly bills, noting and considering any changes since the prior year.

Changes will be accounted for in your budget and may lead to an increase/decrease in your MSOS stipend or a “spend down” which is explained in the section entitled **spending down**. Occasionally, there is no change to your stipend amount. You will be asked to sign a new ‘Program Agreement Extension’ form and a recertification checklist.

Recertification

Completing your recertification in a timely manner is important because it maintains your eligibility and keeps your budget accurate. If you do not meet with your Care Manager and provide all necessary documentation within 30 days of receipt of the recertification letter, your stipend will be suspended until we complete this process with you.

VISIT SCHEDULE

Visits with your CM are typically scheduled every 30, 60, or 90 days depending on your needs and support system. Out-of-state clients are usually seen once per year. Your CM will also call you on the phone every 30 days between in-person visits to check in and discuss any recent updates or changes to your financial status, health, or overall well-being.

Home Visits

Regularly scheduled home visits are a requirement to maintain eligibility on MSOS. Continuous unjustified delays meeting with your Care Manager will cause a disruption to your financial services. Occasionally you may need to re-schedule a visit. We request that you extend your Care Manager the courtesy and provide a 48-hour notice so that they can rearrange their schedule.



ONGOING CARE PLAN

Your health, finances and overall needs will change over time and MSOS support is set up to evolve along with you. MSOS care plans are client specific and are designed with your health and safety in consideration.

Living independently

As long as you are able to demonstrate your ability to live safely at home, MSOS will support you in this environment. Expenses associated with your home or apartment must remain modest and within reason. If these expenses exceed that of a typical MSOS client, you may be asked to downsize to ensure continued MSOS support. MSOS typically supports a studio size apartment for an individual and a one bedroom for a couple. MSOS is able to support moderate rent costs. If the median rent amount in your area is more than what MSOS is able to expend, you may be asked to relocate to a neighboring city or town with a lower cost of living.

Leasing

All leasing agreements and residential agreements must be signed by the MSOS client or their POA, even when MSOS is providing direct support to the landlord for rent. By signing the agreement, the MSOS client is a party to the lease and therefore is responsible for their rent portion and complying with all the other lease terms, such as maintaining the condition of the premises upon move-out. MSOS is not responsible for additional expenses incurred as a result of a move-out inspection that are beyond what is covered with the security deposit. It is the MSOS client's responsibility to work with the landlord or property manager to resolve any dispute for move-out charges. Finally, if MOS paid for the initial security deposit and it is refunded to the client, they must return the deposit to MOS to remain eligible in the Program.

What if I have a roommate?

If you have a roommate, our expectation is that all household expenses are split in half (50/50). As an MSOS client, support is only given to you. Therefore, your budget will reflect your half of all expenses. This expectation may not be applicable in all cases and will be determined at the discretion of MSOS.

In-home support

If you live at home and require in-home care, MSOS will typically support a maximum of 25 hours of in-home care services per week by a bonded and insured agency. We expect you to select a bonded and insured vendor and get approval from MSOS. Your vendor may be paid directly by MSOS. When your care needs exceed 25 hours per week, it is likely that your care plan will change and include a transition to an appropriate senior community (e.g., assisted living facility, board and care home).

Bonded and insured caregivers

MSOS does not pay for caregivers who are not employed by a bonded and insured agency. It is strongly suggested you select a caregiver who is employed by a bonded and insured

agency to safeguard against theft and work-related injuries, and to ensure your personal and financial safety. If you need assistance finding a suitable care agency in your area, please speak directly with your CM.

What if I live in a rural area and have trouble finding a caregiver?

If your location presents a challenge to retaining or maintaining in-home caregivers, or access to medical providers is limited, you may be asked to relocate to a different area in order to alleviate these difficulties. Your CM will facilitate this transition and your budget will be updated accordingly.

Relocating

If an MSOS client wishes to relocate, MSOS can support this type of request upon consideration of several factors. The relocation must be driven by your care and safety needs and the relocation will provide greater support from medical providers and highly involved family/friends/lodge members, etc.

Transition into an assisted living facility or board and care home

Your CM will assist with every step in order to facilitate a smooth and seamless transition. As a charitable nonprofit organization, we are only able to support moderate facility costs in a community which best suits your needs and is within MSOS budget parameters. MSOS typically supports a studio size apartment for an individual and a one-bedroom apartment for a couple. If the median cost for a community in your area is more than the amount that MSOS can support, you may be asked to relocate to a neighboring city or town with a lower cost of living.

What if I experience issues in the new facility and want to move?

If you are experiencing issues in your current residential facility and/or are generally dissatisfied, please speak directly with your CM. Unless it is determined that without moving, your health and safety will be compromised, MSOS may not support your move to a different community. Your CM will work with you and the appropriate person(s) in the community to address your concerns and will assist in reaching a viable resolution.

Skilled Nursing Facility

If it is determined that you meet the eligibility requirements for a skilled nursing facility, MSOS financial support will be terminated, and Medi-Cal will pay for your room and board. If you do not have Medi-Cal, MSOS and your CM can help apply you for these benefits.

Moving into the Homes

If you live within a 30-mile radius of a Masonic Homes campus, this will be the preferred provider, should require a higher level of care. Upon relocation you will continue to receive non-financial care management services from your CM throughout your 90-day introductory period at Masonic Homes to help you acclimate to your new home and to address any of your concerns.

POWER OF ATTORNEY

If you have not appointed a Power of Attorney (POA) for your health and finances, MSOS strongly encourages you to do so as soon as possible. This is an important tool that will enable you to control the health care that you may receive during a time when you are unable to make such decisions for yourself. It is also intended to protect your financial assets financial independence should you become incapacitated in the future. Without a POA for your health and finances, these decisions could be left to estranged family members or the court system. MSOS (and MHC) staff are unable to act as your POA. At your request, your CM will work with you to help identify an appropriate POA or seek out the appointment of a public guardian when/if necessary. Once you have made your POA designation, please provide your CM or MSOS staff member with a copy so they know who to contact in case of an emergency (see below: Preparing for Medical Emergencies.)

PREPARING FOR A MEDICAL EMERGENCY

Emergencies do happen and it is always good to be prepared. An emergency plan should include basics such as, but not limited to, the following: A list containing your emergency contact information; your current medications including dosage, treatment, and allergy information; completion of a “Do Not Resuscitate” (DNR) form and/or a “Physicians Orders for Life Sustaining Treatment” (POLST) form. The DNR and POLST forms can provide instructions to medical professionals to forgo life sustaining treatment such as initiating CPR or advanced cardiac life support in the event that your heart stops beating, or you stop breathing. If you need assistance with emergency preparedness, please speak directly with your CM who may work with you and a professional advisor to document your care decisions if these unfortunate events were to occur.

FUNERAL ARRANGEMENTS

If you have not purchased a prepaid funeral arrangement, MSOS will seek lodge support on your behalf for direct burial or cremation expenses at the time of your death if you are a Mason. If you are the wife, widow, or mother of a Mason, MSOS will work with you to purchase a pre-need and/or cover direct burial or cremation expenses at the time of your death. If you are not satisfied with basic arrangements and wish for more extended services, you will need to seek support from your family, friends, or other sources.

SUSPENSION FROM MSOS

The following may result in temporary or permanent suspension from the program:

Acquiring of assets/Financial suspension

If a home, insurance, or similar policy is liquidated, resulting in the acquisition of a lump sum of money, you must notify MSOS of this occurrence and comply with the Program Agreement terms governing your repayment obligations. If, after repaying MSOS, there are additional monies left, you may be temporarily suspended from receiving MSOS financial support while you have financial independence. For further information on spending down, please reference the section contained in this handbook.

If you and your CM determine it appropriate, you may continue to receive care management support during your financial suspension.

Non-compliance with MSOS rules and guidelines

Failure to follow MSOS rules and guidelines may result in suspension from the program. Reinstatement may be considered if you are able to remedy any noncompliance and/or provide us with reasonable assurances of future compliance.

It is important to note that MSOS is a voluntary program. If you do not agree with our rules and guidelines, you may choose to decline our services at any time.

MANDATED REPORTING

As a mandated reporter, MSOS staff is required to report incidences of abuse, neglect/self-neglect, or exploitation to Adult Protective Services (APS). Reports of any suspected abuse, either in a nursing home, assisted living facility, or board and care home or by a relative or caregiver, etc., will be reported to the ombudsman and /or APS.

GIFTS AND GRATUITIES

Employees and contractors of MSOS are paid for their services. Tips or gifts (including handmade gifts) are not to be given to any employee or contractor without prior approval from the director of Masonic Outreach Services (MOS). Accepting gifts from MSOS clients is cause for immediate termination of employees or contractors. However, birthday and holiday cards and letters of commendation for extraordinary services are permitted. Letters of commendation for MSOS staff members will be placed in the employee's personnel file. Such letters should be addressed to the director of MOS.

CLIENT SATISFACTION SURVEY

Each year, clients are invited to participate in our Client Satisfaction Survey. We are dedicated to providing the highest quality of care management and your thoughts and ideas are always appreciated. We welcome all feedback and are committed to making program improvements where necessary.

The Client Satisfaction Survey is also an opportunity to share your appreciation for the support provided to you by your CM. Because your CM is not allowed to accept gifts, this survey provides you with an opportunity to express your gratitude.

OUR CONTACT INFORMATION:

Masonic Outreach Services

Masonic Home at Covina

1650 E. Old Badillo St.
Covina, CA 91724

Masonic Home at Union City

34400 Mission Blvd.
Union City, CA 94587

Masonic Assistance

Business Hours: 9:00 a.m. - 4:00 p.m.

Monday - Friday 888/466-3642

intake@mhcuc.org

GRIEVANCE POLICY

In the interest of the best possible care and service for our clients, MSOS will investigate and address grievances promptly.

Please contact your assigned care manager to discuss any grievances. A grievance form must be completed and submitted either directly to the Director of Masonic Senior & Family Outreach Services, emailed to masonicassistance@mhcuc.org or mailed anonymously to the following address:

Director of Masonic Senior & Family Outreach Services
1650 E. Old Badillo Street
Covina, CA 91724

If you are unsatisfied with the handling of your grievance, you may contact the Chief Strategic Officer for Masonic Homes of California at smontes@mhccov.org. The Grievance Form attached to this handbook is provided for you below.

Grievance Form

Please complete this form and submit by mail to the director of Masonic Outreach Services, 1650 E. Old Badillo Rd., Covina, CA 91724 or by email to masonicassistance@mhcuc.org.

Date: _____ Date of incident: _____

Name: _____ Relationship to client: _____

Phone number: _____ Best time of day to call: _____

Staff members(s) involved in complaint: _____

Please describe the incident and/or your concern: (Attach an additional sheet if necessary):

Please describe the steps, if any, you took to attempt to resolve the situation and the result:
