

Medi-Cal Program Guide (MPG) Letter #663

January 22, 2009

Subject **ARTICLE A—CLARIFICATION TO THE INSTRUCTIONS FOR THE COMPLETION OF THE GRANT OF LIEN FORM AND UPDATE TO THE LIEN INFORMATION FORM DISTRIBUTION INSTRUCTIONS**

Effective Date Upon Receipt

Reference County Policy

Purpose The purpose of this letter is to provide staff with

- clarifications to the instructions for the completion of the Grant of Lien form; and
- an update to the current distribution for the Lien Information form (CMS-123).

Background All CMS and CMS Hardship applicants are required to sign a Grant of Lien naming the County of San Diego as grantee to secure any and all real property of the applicant as security for repayment of the cost of claims paid by CMS on the beneficiary's behalf as a condition of eligibility. The Grant of Lien requires that the applicant's/beneficiary's signature be witnessed by a Deputy County Clerk, or a Notary Public. County workers are to verify the completion of the Grant of Lien forms before sending the original to central file (0557A). These forms will be recorded when the beneficiary is no longer active on CMS, and CMS has paid claims of \$5,000 or more on the beneficiary's behalf.

Changes The sample Grant of Lien form in Article A, Section 5 Appendix 5A has been updated with item numbers in each space that requires an entry. These numbers correspond to each step in the instructions. The numbers will guide the worker to the corresponding step which will give the instruction for that section of the Grant of Lien form.

The instructions have been updated to clarify the entries for the Grant of Lien form (CMS-122). Some of these updates have been addressed in MPG Letter #659, Questions & Answers, dated November 10, 2008.

Note: Do not punch holes in the Grant of Lien forms as this will prevent them from being recorded.

Article A Section 5 has been updated to reflect the current distribution of the Lien Information form (CMS-123). The original form is scanned into the case record and given to the applicant/beneficiary as their record. This form is not sent to HCPA.

Forms Impact None

Quality Assurance Impact Effective with the March 2009 review month, Quality Assurance will cite with the appropriate error any case that does not comply with the requirements outlined in this letter.

Automation Impact None

Summary of Changes The table below shows the changes made to the MPG.

| Article/Section | Changes |
|-----------------------------------|---|
| Article A, Section 5.5B | Update distribution of CMS-123 |
| Article A, Section 5, Appendix 5A | Update and clarify Grant of Lien form instructions. |

Important Note The MPG is available in its entirety on the Internet and can be reached by accessing <http://hhsa-pg.sdcounty.ca.gov>.

Manager Approval



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