

Constance Holloway
State Director
Carolyn Benzon
Interim General Counsel
Janet Brock Priest
Associate State Director
Operations
Lori Manos
Associate State Director
Policy
Quincy Swygert
Chief Financial Officer
Greg Meetze
Chief Information Officer



COMMISSION
Eddie L. Miller
Chairman
Michelle Woodhead
Vice Chairman
Gary Kocher, M.D.
Secretary
Barry D. Malphrus
David L. Thomas

MEMORANDUM

TO: Executive Directors, DSN Boards with Case Management
CEOs of Contracted Providers with Case Management
Case Management Supervisors

FROM: Lori Manos, Associate State Director of Policy *fm*

DATE: January 24, 2024

RE: Fiscal Agent Transition

The purpose of this memo is to provide additional information regarding the transition from the Charles Lea Center to Morning Sun as the fiscal agent for self-directed services. Providers were notified of the upcoming fiscal agent transition in a DDSN Executive Memo dated December 21, 2023. As indicated in that memo, over the next several months, Charles Lea Center (CLC) Administrative Services will terminate the fiscal agent responsibility for all self-directed services including Adult Attendant Care (ID/RD Waiver), Self-directed Attendant Care-UAP Option (HASCI Waiver), In-Home Supports (CS Waiver), and Statewide Respite Services (ID/RD, CS, and HASCI Waivers). During this time, Morning Sun Financial Services will take over as fiscal agent for all DDSN waiver funded self-directed services. Fiscal agent responsibilities include processing payment for the noted services, withholding taxes, and issuing annual W-2 forms.

Letters to waiver participants/responsible parties and workers have been sent out to notify of this change, and Morning Sun has begun sending new information packets (instructions and forms) for **existing** employers (participants/families currently receiving services authorized to Charles Lea Center Fiscal Agent) and **existing** employees (workers with payroll currently processed through Charles Lea Center Fiscal Agent). This will continue over the next several months, as **existing** employers will receive the packets and be onboarded at differing times based on regions of the state. Please see the chart at the end of this memo for target distribution dates by region. In the interim, if **existing** employers who have not made the full transition to Morning Sun would like to add a **new** worker, they will do so through the Charles Lea Fiscal Agent. Once an existing employer has made the transition to Morning Sun, new workers will be processed by Morning Sun.

Effective **January 24, 2024**, all **new** employers/employees and workers (individuals who are not currently receiving services and are newly certified to begin) will be processed through Morning Sun. The South Carolina Respite Coalition and UAP will send new referrals for respite, Adult Attendant Care/UAP Attendant Care directly to Morning Sun for processing effective on this date. Upon certification that the employer and employee meet all requirements, the case manager will send new referrals for In-Home Supports directly to Morning Sun at: scenrollment@morningsunfs.com or call (844) 450-5444.

Thank you in advance for your assistance in this transition. Please contact Melissa Ritter at (803) 898-5120 or mritter@ddsn.sc.gov with questions.

| Packet Distribution Date | Region |
|---------------------------------|---|
| January 2, 2024 | Pee Dee Region (Florence, Myrtle Beach, etc.) |
| January 8, 2024 | Piedmont Region (Greenville and Upstate) |
| February 4, 2024 | Midlands Region (Columbia and Suburbs) |
| February 29, 2024 | Coastal Region (Charleston and surrounding areas) |