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MEMORANDUM

TO: Executive Directors of 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: July 22, 2024

RE: Fiscal Agent Transition-Deadline Approaching

The purpose of this memo is to remind case managers of the transition from the Charles Lea Center to Morning Sun Financial Services as fiscal agent for self-directed services. This transition will be **effective August 1, 2024**. Since December of 2023, DDSN has been working with the Charles Lea Center and Morning Sun Financial Services toward the transfer of all fiscal agent responsibilities for 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).

Over the course of the last six months, Morning Sun Financial Services outreached via telephone and letter, hosted webinars, held in-person meetings, and enlisted the assistance of case managers to aid in this transition process and offer support to those impacted. In June, DDSN mailed a letter to all individuals authorized to receive participant-directed care who had either:

- (1) Not submitted any of the documentation required to transition to Morning Sun, or
- (2) Submitted a portion of the required documentation but have not completed the process.

That letter provided notification that a deadline for transition had been imposed, and transition packets were due to be submitted by June 30, 2024. Participants were notified that failure to submit the required documentation by this date would result in an interruption of payments for services. As indicated in the letter sent to those who had not completed the transition process and in the DDSN Executive Memo dated June 7, 2024, the last payroll Charles Lea Center will be authorized to process is Friday, August 9, 2024, for dates of service through July 31, 2024. Morning Sun Financial Services will continue to

work toward enrolling any individuals who submitted packets or corrections after the June 30, 2024 deadline but cannot guarantee their processes will be complete in advance of the transition date.

All remaining authorizations to the Charles Lea Center for fiscal agent services will be ended effective July 31, 2024. Individuals whose transition to Morning Sun has not been completed by this date will experience an interruption in services until such time as the participant's worker and Employer of Record have completed the Morning Sun enrollment process. In addition, case managers are reminded that authorizations **may not be issued** to Charles Lea Center for fiscal agent services after July 31, 2024.

To ensure there is minimal disruption to services, please review your caseload and make certain those receiving participant-directed services who have not yet completed the fiscal agent transition immediately submit all required documentation to Morning Sun Financial Services.

Please contact Melissa Ritter at 803-898-5120 or mr Ritter@ddsn.sc.gov with questions.