

## Guideposts for Entering the Self Determination Program

A general guide to timing and steps to start

A	B		C	D
Orientation	Person Centered Plan (optional)	Independent Facilitator (optional)	Individual Budget	Financial Management Service
(2-4 weeks)	(4-6 weeks, may be done simultaneously)		(2-4 weeks)	(1 week)
<ul style="list-style-type: none"> <li>Attend RCEB Orientation</li> <li>Participant receives from Case Manager (CM) <b>Expenditure Report and Budget Tool</b> of your last 12 months of spending</li> </ul>	<ul style="list-style-type: none"> <li>You may choose to use a person-centered plan facilitator to help you identify your hopes and dreams, and then <b>outline goals</b></li> <li>If desired, select a facilitator and arrange with your case manager for funding through a Purchase of Services (POS)</li> </ul>	<ul style="list-style-type: none"> <li>You may choose to engage an Independent Facilitator to help you with any part of your transition, depending on what you need help with</li> <li>If desired, select an IF and enter into agreement on terms of service and how much they will cost</li> <li>If desired, select an independent facilitator for transition steps and arrange with your case manager for funding through a Purchase of Services (POS).</li> </ul>	<ul style="list-style-type: none"> <li>Meet with the CM to review the Expenditure Report and Budget tool. Discuss RCEB services to capture current needs (including <b>UNMET NEEDS or NEW NEEDS.</b>)</li> <li>Come to agreement after review and Certify (sign) <b>Individual Budget</b> (ongoing discussions may be necessary).</li> </ul>	<ul style="list-style-type: none"> <li>Interview FMS providers and decide which FMS model works best for your case.</li> <li>Select an FMS agency to use for managing your self-determination funds.</li> </ul>
Participant, RCEB, CM	Participant, CM		Participant, IF	SDP Participant, IF
E	F	G	H	I
Spending Plan	Hire Staff /Arrange Services and Supports	SDP Individual Program Plan	End Traditional Model	SDP Accounting
(1-4 weeks)	(2-4 weeks)	(2-3 weeks)	(1 Day)	(1 week)
<ul style="list-style-type: none"> <li>Complete the Spending Plan showing the supports and services that you will purchase to meet your annual goals                             <ul style="list-style-type: none"> <li>Confirm with FMS to verify taxes and expenses</li> <li>Include service, cost, duration, and frequency</li> </ul> </li> <li>Send completed Spending Plan to your Case Manager for review of codes, HCBS, use of generic resources</li> </ul>	<ul style="list-style-type: none"> <li>Interview providers and decide who you will work best for your needs.</li> <li><b>Sign contracts</b> with SDP service providers with the <b>SDP Date</b>.</li> <li>Hire Staff to start service <b>coordinated</b> with the date of <b>SDP Start Date</b>. Allow time for background checks if you are hiring staff directly</li> </ul>	<ul style="list-style-type: none"> <li>Schedule <b>SDP Transition IPP</b></li> <li>Discuss how the Spending Plan services meet your SDP IPP goals.</li> <li>Sign the <b>spending plan</b> and <b>SDP IPP</b></li> <li><b>Set your preferred SDP start date</b> (which has to be on the first of a month in the future.)</li> </ul>	<ul style="list-style-type: none"> <li>End Traditional Model POS, SDP will start the next day *(RCEB must give 30 days' notice to traditional model service providers)</li> <li>SDP service providers who need to begin work immediately should have completed the enrollment process with the FMS prior to your selected start date</li> </ul>	<ul style="list-style-type: none"> <li><b>CONFIRM SDP START DATE for the First of the month!</b></li> <li>RCEB processes POS for SDP Services</li> <li>RCEB updates accounting and opens an account for you in your choice of FMS.</li> <li>Confirm FMS has your account ready to activate on the start date!</li> </ul> <p><b>START SELF-DETERMINATION!</b></p>
Participant, FMS, IF, CM	Participant, FMS, IF	Participant, CM, IF, FMS	Participant, IF, FMS	Participant, IF, FMS, CM

**KEY:** | SDP = Self Determination Program | Participant = Individual/ Family in SDP | RCEB = Regional Center East Bay | CM = Case Manager | IF = Independent Facilitator

|| Note that each person's self-determination is unique. The transition process may be shorter or longer, and the steps may vary.