



## Checklist for Parents/Participants

### 1. Person Centered Planning

- Check your Regional Center's Self-Determination page and complete their requirements for the Orientation. Most Regional Centers ask that parents/participants take the SCDD's Orientation. If that is the case, [HERE](#) is the link.
- Select Independent Facilitator (if desired) and tell your Regional Center. The Independent Facilitator will help create a Person-Centered Plan Click [HERE](#) to find an Independent Facilitator listing.
- Get Authorization form signed ([sample here](#))
- Conduct Pre-Planning(s) for your PCP Meeting
- Hold Person-Centered Planning Meetings as needed
- Develop a written Person-Centered Plan
- Submit the document to your Service Coordinator
- Make sure your PCP Planner or IF has their vendor paperwork done – submit an invoice to trigger the vendor number, if needed.

### 2. Individual Budget

- Get past 12-month expenditure report from your Regional Center. This will be the basis of your budget
- Meet with Regional Center about the budget – ask for a supervisor to also attend
- The Regional Center should provide you with a completed [Budget Tool](#)
- If appropriate, ask for a change in budget based on change in circumstances or unmet need(s)
- Schedule assessments as needed
- Once amount is agreed upon, Regional Center certifies the budget
- [Select an FMS](#) and [what model you want to use](#)

### 3. Services and Spending Plan

- Identify services, staff and items to meet your goals. You can find some service providers [HERE](#).
- Write down all of the things that cost money, then think of who can pay for it (generic resources). Generic resources can include the school district, Department of Rehab (for adults) and health insurance, to name a few.
- For those services that the SDP will pay for, figure out the costs and write them on your spending plan ([see sample worksheet](#), [service codes](#))

## Checklist for Parents/Participants

### 3. Services and Spending Plan, Cont.

- Make sure all of your services are in settings that are inclusive. If you have questions, ask your Service Coordinator
- Make sure your services are on the list from DDS ([Service Definitions](#))

### 4. Your Individual Program Plan

- Schedule your IPP after you have your PCP and spending plan completed
- Regional Center will verify that services meet [guidelines for inclusive settings](#), generic resources and approved services – Your FMS can help with this too
- Regional Center attaches your spending plan and PCP to your IPP. The document is signed
- Send your signed IPP and spending plan to your FMS
- Make sure that Regional Center transfers the funds to the FMS

### 5. Your Life in Self Determination

- Make sure to look at every monthly statement. If you are over your budget for that month, you should speak with your FMS. If you have questions about how to find this information, ask your FMS and/or Independent Facilitator, if you hired one.
- Hire an Independent Facilitator to help you after your PCP to find new staff, manage staff, find new activities and items (optional)
- Tell the FMS if you change your staff or want to do something different that your spending plan. Remember it is not a big thing to rearrange things in your spending plan, and if you have to have a meeting with your Regional Center, these are usually really short because you are addressing one single item.
- Update your PCP any time you need to, but at least once a year. Address any changes or unmet needs. Remember you don't have to wait until the annual meeting to change things around. Work with your FMS.
- Need to change your spending plan? Work with your FMS and Regional Center Coordinator. If moving over 10% to another category, you might need to have a meeting with your coordinator.