



June 15, 2023

To: All SARC Financial Management Service (FMS) providers:

Re: Monthly POS and year end process

Dear Service Provider,

This letter is to inform you of the change in the setup of self-determination (SDP) POS's at San Andreas Regional Center (SARC). Previously, SARC established POSs on an annual basis; however, it has now transitioned to a **monthly frequency**. This change aims to prevent delays in processing budgets that extend across fiscal years.

Note that the POS report will only reflect the budget for the current fiscal year period. However, there has been no **change in billing procedures**. FMS's are still required to bill within the annual budget categories in ebilling. **Billing is not restricted to the monthly amounts** listed as the spending plan is based on annual budget categories. This change in POS frequency allows continuous billing without waiting for a new POS to be created for the remainder of the next fiscal year. An example is provided on the next page.

As a reminder, POS's starting after 6/30/2023, cannot be processed until the completion of the year-end process and the availability of the new fiscal year in the system. This restriction is inherent to our accounting system, and it will not assign an POS number if the fiscal year is not available.

SARC will continue to pay FMS's on a weekly basis for submitted invoices.

Please direct questions regarding billing and SDP POS processing to: sdpfiscal@sarc.org

Regards,


[John Hunt \(Jun 15, 2023 16:19 PDT\)](#)
John Hunt
Chief Financial Officer

SANTA CLARA COUNTY
P.O. Box 50002
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Consumers First Through Service, Advocacy, Respect and Choice"

Serving Persons with Developmental Disabilities



AUTHORIZATION TO PURCHASE SERVICES

San Andreas Regional Center
P.O. BOX 50002
SAN JOSE, CA 95150-0002
408-374-9960

DATE [REDACTED] Page 16 of 44

AUTHORIZATION NO [REDACTED]

VENDOR INFORMATION

VENDOR NO. [REDACTED]

CLIENT INFORMATION

CLIENT ID. [REDACTED] Birth Date [REDACTED]

NAME
ADDRESS



NAME
ADDRESS



PHONE

PHONE

OFFICE INFORMATION

CASEWORKER: [REDACTED]

CASEWORKER I.D. NO. [REDACTED]

DESCRIPTION OF SERVICES	AUTHORIZATION UNITS	BUDGET CODE	ACCOUNT CODE	MAX NO. OF MONTHS	AUTHORIZED FROM - TO	MAX. UNITS/MONTH	UNIT COST	MAX. AUTH. AMOUNT
DENTAL SERVICES	1.00	VARIABLE	65110	12	SDP - DENTAL SERVICES - H&S	5/01/23 4/30/24	1.0000	333.34
	65							

Total amount of \$333.34 was the amount for the months for May and June (current fiscal year). The new POS beginning July will show the total budget for 10 months (7/23-4/24). However, you can still bill over the monthly amount as long as it will not exceed the total budget per year, per DDS.

The bottom of the authorization the total annual budget of \$2,000 (5/1/23-4/30/24)

FUNDING AFTER THE END OF CURRENT FISCAL YEAR (6/30 each year) CONTINGENT UPON ADEQUATE STATE FUNDING.

COMMENTS

NTE \$2,000.00 PER YEAR (05/01/23-04/30/24) TO GROSS AUTH AMT 333.34
TAL BUDGET FOR YEAR NTE \$291,904.50 LESS OTHER REV TO VENDOR .00
PROCESSED AS MONTHLY .00
TOTAL OFFSET OF RC COST .00
TOTAL RC LIABILITY 333.34

TO PROVIDER OF CARE:

Please read carefully. If you cannot meet the terms of this arrangement please notify promptly the Business Office of the Regional Center. This "Authorization To Purchase Service" may be cancelled prior to the indicated expiration date, and this event, notification of such termination will be given. THIS CANCELS ALL

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FMS notification

Final Audit Report

2023-06-15

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