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Self Determination Conference

"Beyond the Orientation
of the Program"

Introduction and Welcome

By: Mike Keeley



Welcome and Ground Rules

- Welcome and Introductions
- Zoom protocol and Questions
- Purpose of the conference and overall agenda
 - General Overview of Self Determination
 - Unmet needs
 - Natural Support and Generic Resources
 - Independent Facilitator (IF)
 - Certified Budget
 - Spending Plan
 - Financial Management System (FMS)

Jason's Path to SDP

Later we will
highlight a case
example of an adult
client and his path to
Self- Determination.

Self Determination Program (SDP) General Overview



**Self Determination is a new way of
providing services**



The same basic principles apply

You still have an Individual Program
Plan

You still work with the Regional
Center and your Service Coordinator

You still use person centered
planning and focus on the individual

The principles of the Lanterman Act
still apply to Self Determination, but
there is more flexibility in how
services are secured.

The 5 Principles of Self Determination

Freedom

- Planning your own life and making your own decisions

Authority

- Deciding how money is spent on services and supports

Support

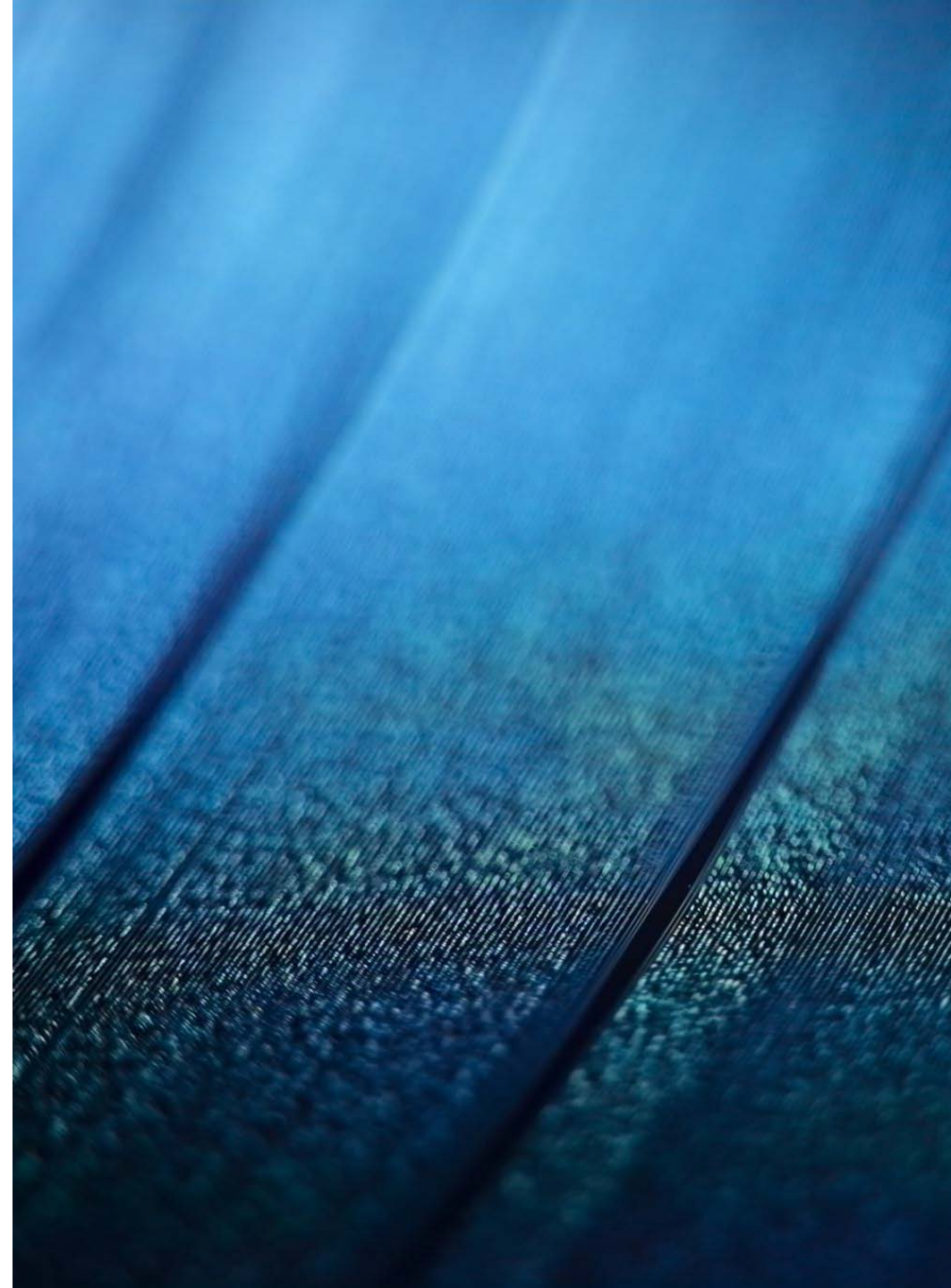
- Picking people and supports that work for you

Responsibility

- Being accountable for choices, your role in the community, and your decisions

Confirmation

- You are the decision maker and the person responsible for making choices in your life.



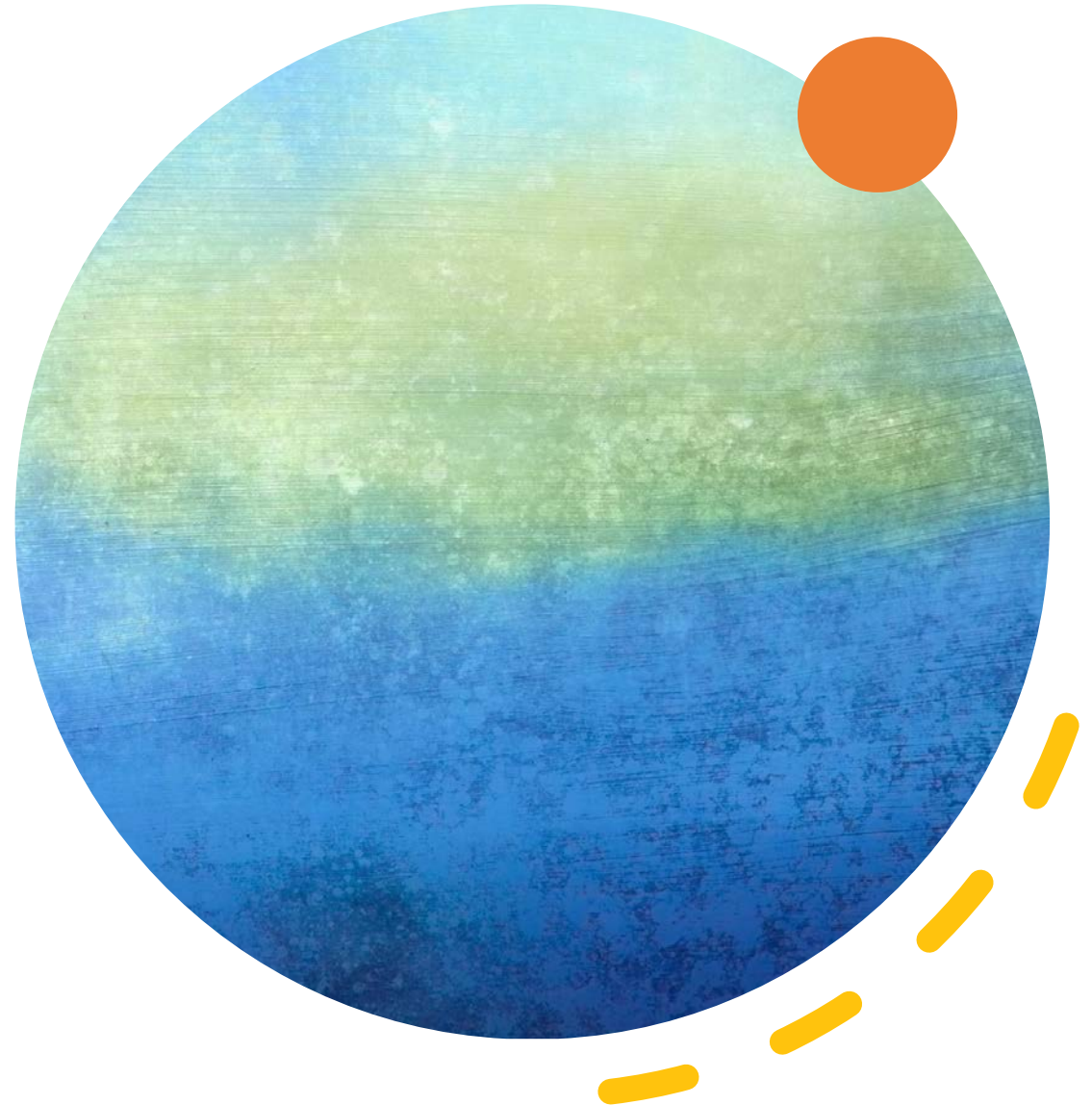
What's the same, and what's different?

There are many of the same things in Self Determination as there are in traditional services. Things that remain the same include:

- Person Centered Planning
- Individual Program Plan (IPP)
- The Regional Center and Service Coordinator
- Having a support team made of people you care about, and who care about you.


Some of the differences in Self Determination include:

- Use of non-vendored providers
- The Independent Facilitator
- Using a Financial Management System
- Creating a certified budget and individualized spending plan





Self Determination Funding Basics

- Why this topic?
 - Help to sort out what type of funding is allowed.
 - Explains the "Final Rule"
 - Explains the role of generic resources and natural supports
- 

Some SDP Funding Basics

There are four very basic rules for the use of individual budget funds for self-determination:

Funding must be legal

Funding must not be used in a way that would cause any physical harm

Funding must support the need in the Individual Program Plan

As with traditional services, the regional center is still the "funder of last resort".



Requirements of Planning for Services

The services you pay from your spending plan:

Must be an approved service (services approved by the Federal Government)

Must be with providers that are qualified

Must support choice and inclusion

Must be identified as a need on the Individual Program Plan

May be vendored or non-vendored

Must be in line with the "Final Rule" and Home and Community Based Service

Home and Community Based Services and the "Final Rule"

The "Final Rule" is a requirement that the spending plan must be provided in places where someone is included in the community. This means integrated into the public and not isolated.

The key concepts of the Final Rule are community integration, individual choice, and having control over one's life.

The Self Determination Program is designed so that people can make their own choices, live in neighborhoods of their own choosing, and make friends with people with and without disabilities.

Developing the Spending Plan

Once the Person-Centered Plan and the Individual Program Plan have been created, and the certified budget completed concurrently, a spending plan is developed. Many services can be funded from the individual budget; however, some services are not funded this way. In addition to the individual budget funding, support needs to come from the following areas:



Generic Resources



Medical
Insurance



Natural Supports

Generic Resources

These are services that are available to anyone in the community. These must be used before using funding from the regional center. Examples of generic resources include:

School Services

Public
Transportation

In Home Support
Services

Public Community
Services (libraries,
community centers,
YMCA, etc.)

Department of
Rehabilitation

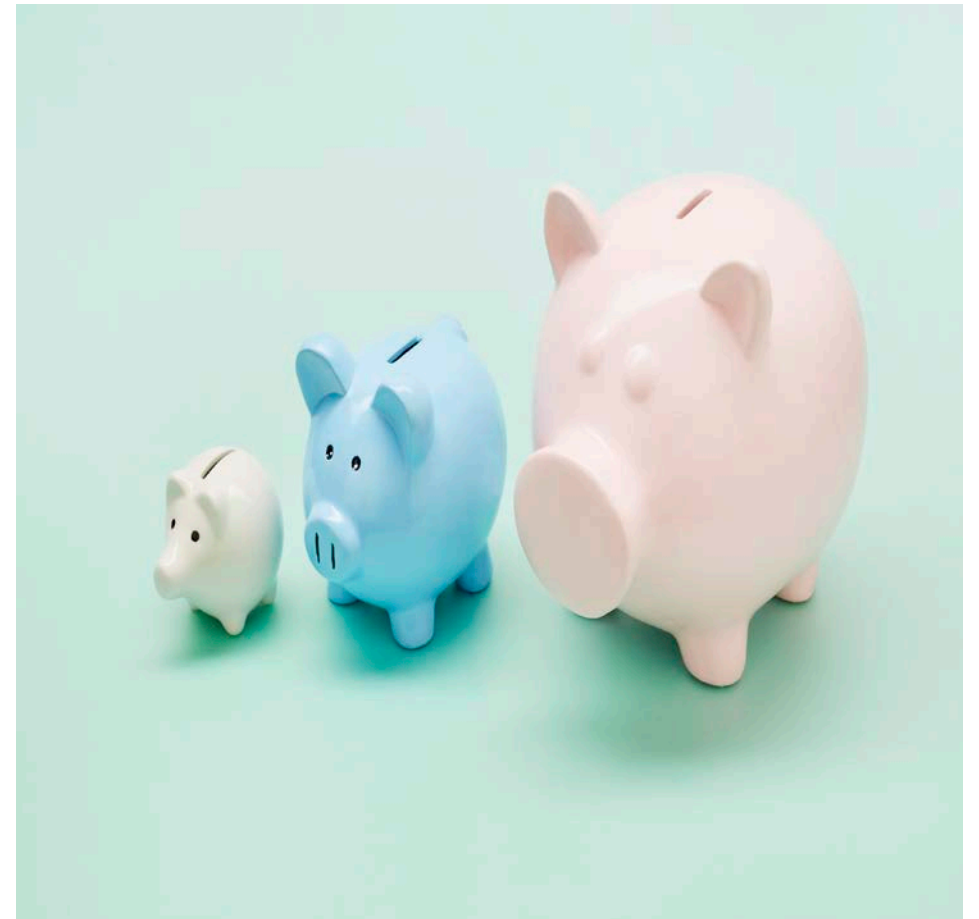
Churches

Public housing
assistance

More Generic Resources

Essentially, a generic resource is something that is available to anyone in the community, regardless of whether they have a disability or not. These services must be used before using regional center funds.

- Free legal advice services
- Family resource centers
- Public recreation programs
- Community events open to the public
- Supplemental Security Income (SSI)
- Private Trust funds
- CalAble Accounts or Special Needs Trusts
- Using Generic resources helps save money in the Spending Plan



Insurance

Individuals are required to first look into their own medical insurance before using regional center funding, even in the Self Determination Program. Some examples of insurance include:

Medi-Cal

Denti-Cal

Private Insurance
(like Kaiser, Blue
Cross, Blue Shield)

County mental
health services
funded by
insurance

California
Childrens Services
(CCS)

Natural Supports

Natural supports are things that people have in their environment that help them out, usually without being paid. These people provide support because they are part of that person's life and want to help out. Some examples include:

- Friends
- Family and extended family
- Spouse or significant others
- Neighbors
- Church members

Self Determination Funding Limits

Family still has to access generic and natural supports

Funding services that were not approved to be federally reimbursable

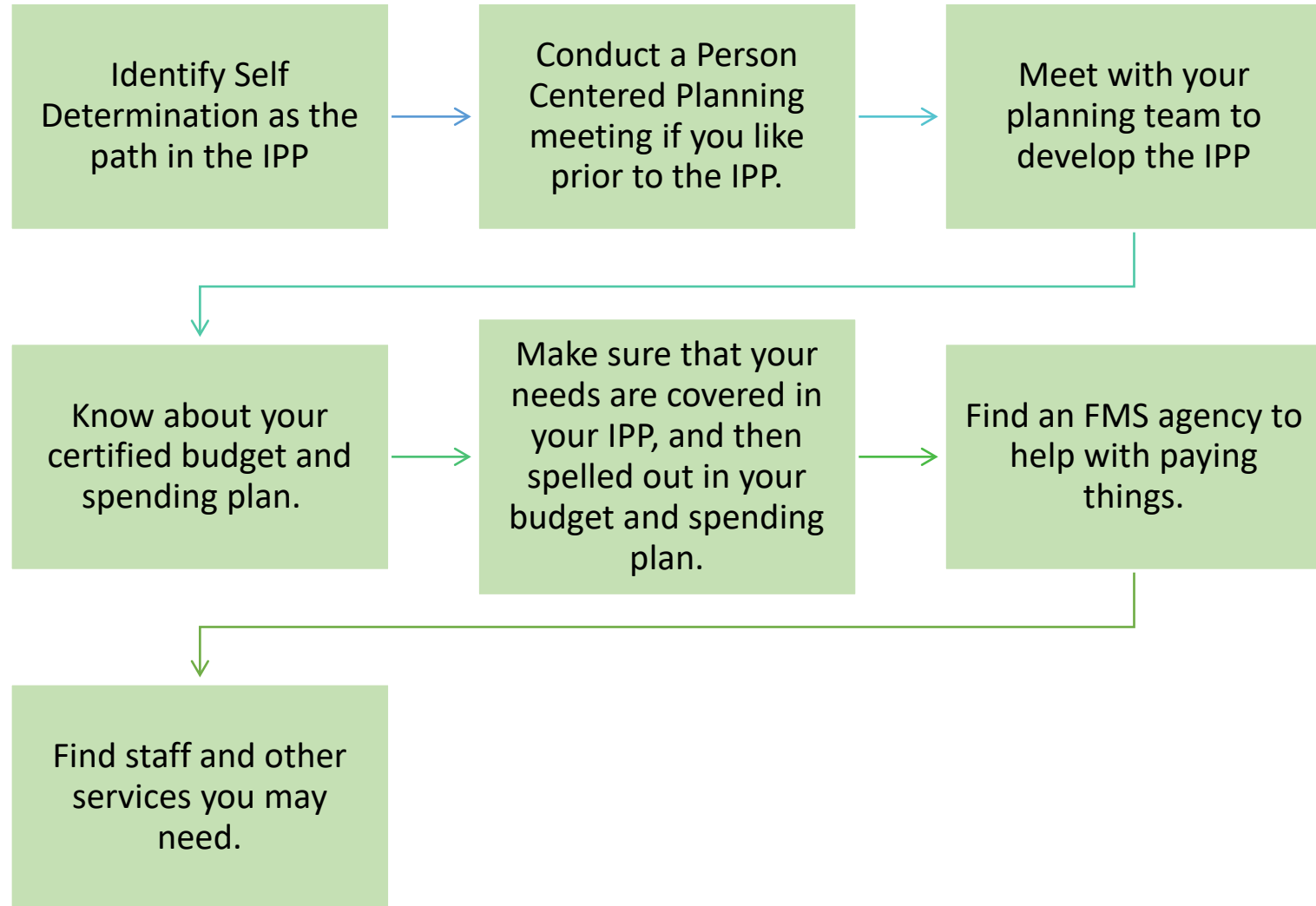
Funding things that were not listed as a need/goal in the IPP

Funding things that are experimental

Funding things for people other than the individual in the Self Determination program



The Path to Self Determination (In Summary)





The Independent Facilitator

By: Ivett Vazquez

- Why this topic?
 - It's unique to Self Determination
 - It's an option services that some people might want, and some might not want.
 - People want to know who can be the facilitator and what they can do.
 - People want to know about the cost and training of the Independent Facilitator.

Who is an Independent Facilitator?

A person selected and directed by the participant who is not otherwise providing services to the participant

Is not employed by a person providing services to the participant

Independent Facilitator CANNOT provide any other services to the participant or work for an agency that provides services to participant

What can an IF assist with?

Can help participant
make
informed decisions
regarding individual
budget

Can help locate,
access, and
coordinate the
services and supports
in inclusive settings.

What else can the IF assist with?

Can help identify your needs and in finding options to meet those needs

Can help by leading, participating, and advocating during the PCP process and IPP development

What type of certification or licensure is required of Independent Facilitator?

Independent Facilitator is not required to have certification or licensure

BUT must receive training on SDP

Must NOT provide any other service to participant

Choosing the Right Independent Facilitator: WHAT DO YOU NEED?

Do you need help accessing your community or neighborhood?

Do you need people to do different things?

Do you need help with Person-centered planning?

Help with advocacy?

Help with accessing public benefits?

Choosing the Right Independent Facilitator: WHAT DO YOU WANT?

Someone who is
very organized?

Someone who is
calm and gentle?

Someone who
readily
understands your
family?

Someone who
understands your
culture?

Who pays the cost of the Independent Facilitator and how much does it cost?

Cost is negotiated between the independent facilitator and participant

Is paid from participant's individual budget

Can be paid or unpaid

Participant can hire one or more independent facilitators


Can a family member be a paid or unpaid Independent Facilitator?

YES, However, a **parent of a MINOR participant or a SPOUSE of a participant CANNOT** be paid as an IF (they are legally responsible entities and not eligible to provide paid services under SDP).

If a participant chooses not to use the services of an Independent Facilitator, who can support the participant?

Participant may choose to use a regional center service coordinator to provide the services and functions of the independent facilitator.


*** Services of an Independent Facilitator is NOT required in SDP



Unmet Needs & Change of Circumstance

By Diana Gutierrez



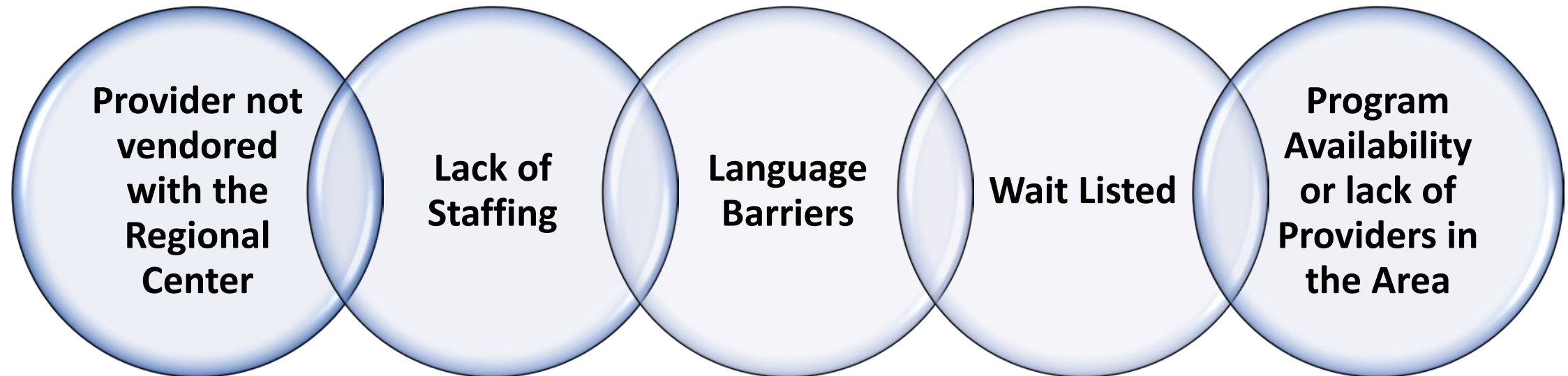
- Why this topic?
 - Sometimes people needed services that were not available to them
 - People's lives change all the time, and their needs can change
 - Sometimes it's tricky sorting out the difference between what someone really needs to support them and what they would want in their life because it's new or fancy.
 - Moving from identifying a person's needs into a budget can get tricky.
- 

Unmet Needs

An unmet need is a service identified as needed and not yet provided and/or never used

Individual Budget

When can an Individual Budget Change?



Individual Budget

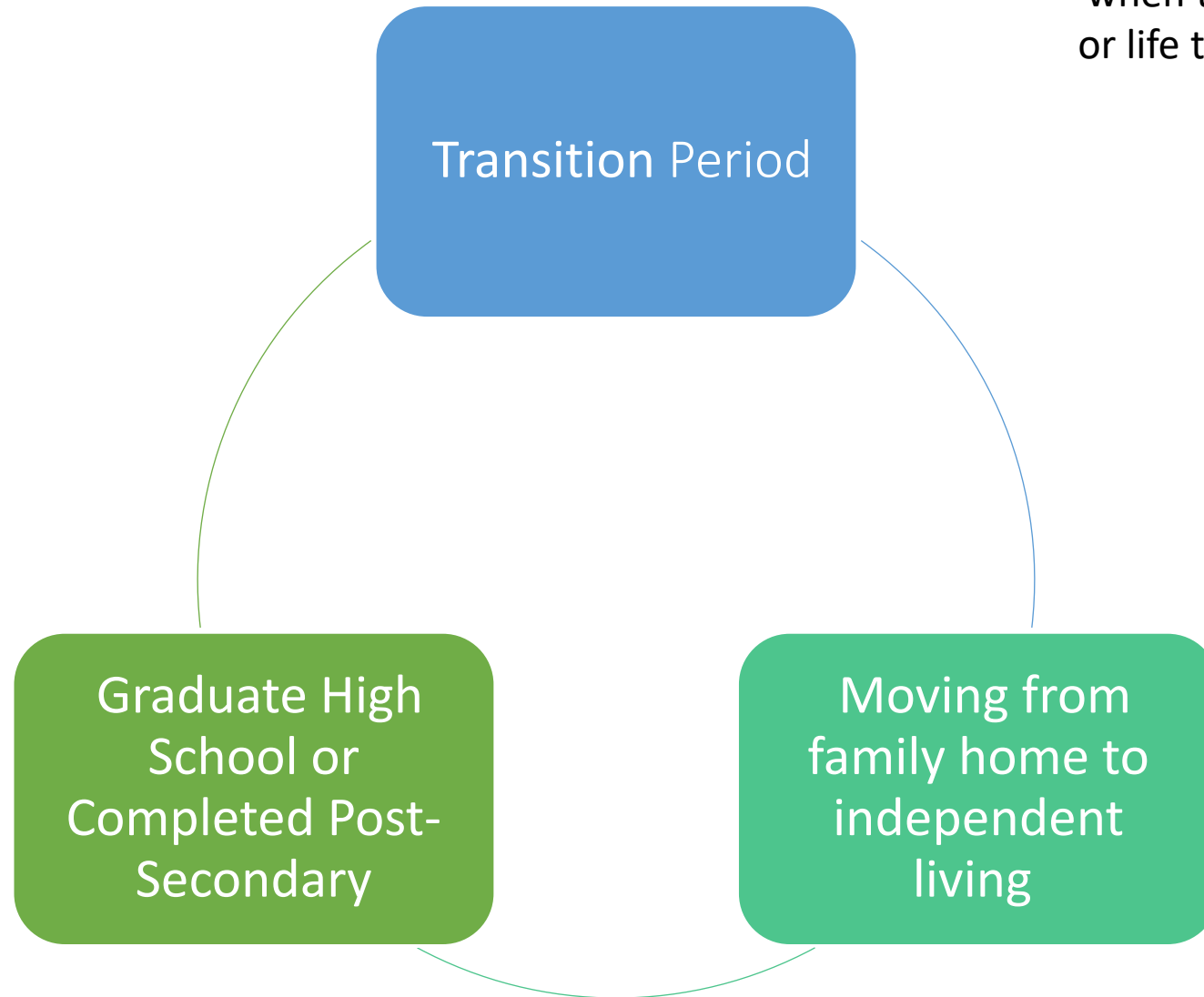
When can an Individual Budget Change?

Change in Circumstances

“When life has changed, and so have your needs”



A change in circumstance occurs when there is a change in situation or life that results in a change in the needs.



Self Determination Certified Budget & Spending Plan

INTO THE WEEDS: Certified Budget and Spending Plan

By: Mia Garza

What is the difference between the certified budget and the spending plan?

The Certified Budget is...

- The amount of dollars that has been approved for you to spend on the goods/services you need to lead a meaningful and fulfilled life.
 - Based on the amount of money that was authorized for the last 12 months.
 - Inclusive of unmet needs, new needs, changes in circumstances and less any one-time purchases.
 - You can obtain a copy of your last 12 months of authorizations from your Service Coordinator.



The Spending Plan is...

- Is a breakdown of the certified budget. It is a list of items that you wish to purchase to meet your needs that have been identified in your Individual Program Plan (IPP).
- You will use the money from your certified budget to pay for the goods/services that meet your needs as identified in your spending plan.

How is the certified budget developed? (Baseline Total and Annualization)

SELF-DETERMINATION PROGRAM PARTICIPANT BUDGET WORKSHEET					
Date prepared:		Budget Start Date:	(mm/dd/yy)		
Service Coordinator		Budget End Date:			
Consumer Name					
UCI #					
Date of Birth:					
<p>The Individual Budget should be calculated and certified in conjunction with, or prior to, development of the Individual Program Plan (IPP) and Spending Plan for SDP.</p> <p>BASELINE AMOUNT: Determine the baseline annual expenditures</p> <p>TOTAL AMOUNT ON REPORT</p> <p><i>*Enter the total amount paid by a Regional Center using the 12-month expenditure report</i></p>					
<p>Annualization Table: Determine the costs for services that should be annualized (if any)</p> <p><i>Services identified in the current IPP and in the Baseline Amount reflecting less than 12 months of payment made to the provider; or where no payment has yet been made to the provider. Leave this table blank if this does not apply</i></p>					
Service Provided/Funded for less than 12 months	Service Code	Does this service require an "annualized" cost to determine the SDP budget?	UNFUNDED units during the year	Rate per unit	Annual unused amount
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
TOTAL ANNUALIZATION AMOUNT					\$ -

An example would be transportation services. Leave this table blank if this does not apply.

Type/Description of Service	Agency Name	Monthly Group Cost	Number of individuals served	Adjusted Cost for 12 months of service <i>(monthly group cost divided by number of individuals served, multiplied by 12 months)</i>
TOTAL GROUP CONTRACT AMOUNT				\$ -

*These are services that were recently identified and not recorded in previous tables. Leave this table blank if this does not apply. This specific table **MUST** be completed in conjunction with the **AGREED UPON** Individual Program Plan (IPP).*

[illegible]

✓ Certified budget in conjunction with the Individual Program Plan (IPP)

- If there are new needs/change in circumstances, the certified budget can only be finalized after the agreed upon IPP is completed.



- New needs and change in circumstances need a goal generated in the IPP.

How is the budget subtotal calculated? (Budget Subtotal Calculation)

Calculate the Budget Subtotal: Adding the total amounts from all previous tables.

Baseline Amount	\$ -
Annualization Table Total	\$ -
Group Contract Table Total	\$ -
Newly Identified Needs Table Total	\$ -
SUBTOTAL	\$ -

How is the certified budget developed? (Non-continuing Services and/or Onetime and Continuing Services Handled Outside of the Individual Budget)

Non-Continuing Services: Determine the cost of services that are not expected to continue, regardless of participation in the SDP

Leave this table blank if this does not apply.

Service Description	Amount
TOTAL NON-CONTINUING SERVICES AMOUNT	\$ -

Continuing Services Handled Outside of the Individual Budget: Cost of services that are on-going but will be handled outside of the individual budget or the spending plan:

Leave this table blank if this does not apply.

Service Description	Amount
TOTAL CONTINUING SERVICES AMOUNT	\$ -

How is the finalized certified SDP budget calculated?

Calculate the annual individual budget:

Budget Subtotal	\$ -
Non-Continuing Services Total	\$ -
Continuing Services Not a Part of the Individual Budget Total	\$ -
SUBTOTAL	\$ -
Self-Determination Annual Individual Budget	\$ -

Regional Center: I certify that the regional center expenditures for this individual budget, including any adjustment, would have occurred regardless of the individual's participation in the Self-Determination Program per Welfare and Institutions Code 4685.8 (n)(1).

Service Coordinator Printed Name

Service Coordinator Signature & Date

District Manager Printed Name

District Manager Signature & Date

Director of Consumer Services Printed Name

Director of Consumers Services Signature & Date

Participant or Legal Representative: The individual budget document calculation and certification has been reviewed with me.


Participant or Legal Representative Printed Name

Participant or Legal Representative Signature & Date



The Spending Plan



- Why this topic?
 - This is unique to Self Determination
 - It's important to know what services are allowed in a spending plan
 - Some services are not allowed in the spending plan
 - Some people get stuck sorting out all the pieces in a spending plan
 - People ask about "the final rule"
 - There are some things that overlap in "traditional" and Self Determination guidelines that apply to the spending plan (like using generics and natural supports)
- 

How is the Spending Plan Developed?

Services identified during **Person-Centered Planning** & documented on your **IPP**.



Support:

- Family & friends
- Service Coordinator
- Independent facilitator
- FMS



Determine:

Generic services.

What services will **not** come from your individual budget?



Determine:

- Who?
- How often?
- When?
- Length of time?
- Cost?



How is the Spending Plan developed?

- After the individual budget amount is determined, the participant develops a spending plan to use the available funds to purchase goods and services which meet their IPP goals and objectives

Spending Plan Development/Review

- Participants develop their spending plan.
 - The spending plan shall identify the cost of each good and service that will be purchased with regional center funds. If the exact cost is not known, it may be estimated.
 - The spending plan identifies the type of person providing each service. It does not need to include the name of a specific provider.
 - The total spending plan amount cannot exceed the total individual budget amount.

Spending Plan Development/Review continued.....

- Once the spending plan has been completed, the regional center reviews the spending plan for compliance with state law, including verification that the identified goods and services are eligible for federal financial participation and are not used to fund goods or services that are available through generic agencies.
- The approved spending plan must be attached to participant's agreed upon and signed IPP.

Spending Plan

SELF-DETERMINATION PROGRAM

SDP SPENDING PLAN WORKSHEET

Date prepared:	1/01/2000	Budget Start Date:	01/00/00
Service Coordinator:	1/01/2000	Budget End Date:	01/00/00
Consumer Name:	1/01/2000		
UCI #:	1/01/2000		
Date of Birth:	1/01/2000		

SDP Services												
IPP Objective	Vendor Number	SDP Services	Sub	BUDGET CATEGORY	SDP Funded	Service Provider	# of Units	Frequency	Unit cost	Annual Units	Total	Justification
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	
Total Spending Plan											\$0.00	

SPENDING PLAN SUMMARY BY BUDGET CATEGORY:												
1 - Living Arrangement											\$	-
2 - Employment & Community Participation											\$	-
3 - Health & Safety											\$	-
TOTAL											\$	-

Other Sources of Support												
Amount												
In-Home Support Services		Generic		N/A								
Medi-Cal		Generic		Per benefits								
SSI		Generic		N/A								

The regional center certifies on the individual budget document that regional center expenditures for the individual budget, including any adjustment, would have occurred regardless of the individual's participation in the Self-Determination Program. * (VIC 4685.8(b)(1)(ii)(III))

Regional Center: I certify that the regional center expenditures for this individual budget, including any adjustment, would have occurred regardless of the individual's participation in the Self-Determination Program.

Service Coordinator Printed Name Service Coordinator Signature & Date

District Manager Printed Name District Manager Signature & Date

Director of Consumer Services Printed Name Director of Consumers Services Signature & Date

Participant or Legal Representative: The individual budget document calculation and certification has been reviewed with me.

Participant or Legal Representative Printed Name Participant or Legal Representative Signature & Date

FISCAL USE ONLY

INPUT DATE: _____

INPUT INITIALS: _____

APPROVED BY: _____

Budget Categories within the Spending Plan



The 3 Budget Categories:

Living Arrangement
Employment & Community
Participation
Health & Safety



Spending Plan Changes:

Transferring up to 10 %
between categories

Transferring more than 10%
between categories

Budget Category

Self-Determination Program Service Codes by Budget Category

Budget Category	SDP Services	Service Code	Description/Providers
Living Arrangement (310 - 330)	Respite Services	310	Respite (Individual and Agency) In -home
		311	Respite Facility - Out-of-Home
	Live-In Caregiver	312	Live-In Caregiver
	Homemaker	313	Homemaker
	Housing Access Supports	314	Housing Access Supports
	Financial Management Service	315	FMS Fiscal Agent
		316	FMS Co-Employer
		317	FMS Fiscal/Employer Agent
	Community Living Supports	320	Community Living Supports (Individual and Agency)
		321	Residential Facility
Employment & Community Participation (331 - 355)	Community Integration Supports	331	Community Integration Supports
	Participant-Directed Goods and Services	333	Participant-Directed Goods and Services
	Individual Training and Education	334	Individual Training and Education
	Employment Supports	335	Employment Supports
	Technology Services	336	Technology Supports
	Transition/Set Up Expenses	337	Transition Set-Up Expenses
	Non-Medical Transportation	338	Non-Medical Transportation
	Prevocational Supports	339	Prevocational Supports
Health and safety (356 - 399)	Independent Facilitator	340	Independent Facilitator
	Environmental Accessibility Adaptation	356	Environmental Accessibility
	Acupuncture Services	357	Acupuncture Services
	Personal Emergency Response Systems (PERS)	358	Personal Emergency Response Systems
	Home Health aide	359	Home Health Aide
	Communication Support	360	Communication Support
	Skilled Nursing	361	Skilled Nursing
	Nutritional Consultation	362	Nutritional Consultation
	Crisis Intervention and Supports	363	Crisis Intervention and Supports
	Behavioral Intervention Services	364	Behavioral Intervention Services
	Specialized Medical Equipment and Supplies	365	Specialized Medical Equipment and Supplies
	Family/Consumer Training	366	Family/Consumer Training
	Dental Services	367	Dental Services
	Lenses and Frames	368	Lenses and Frames
	Optometric-Optician Services	369	Optometric-Optician Services
	Psychology Services	370	Psychology Services
	Training and Counseling Services for Unpaid Caregivers	371	Training and Counseling Services for Unpaid Caregivers
	Speech - Hearing and Language	372	Speech - Hearing and Language
	Chiropractic Services	373	Chiropractor
	Massage Therapy	374	Massage Therapist
	Occupational Therapy	375	Occupational Therapy
	Physical Therapy	376	Physical Therapy
	Vehicle Modifications and Adaptations	377	Vehicle Modifications and Adaptations
	Family Support Services	378	Child Day Care Facility

Budget Category	SDP Services	Service Code	Description/Providers
Living Arrangement (310 - 330)	Respite Services	310	Respite (Individual and Agency) In -home
		311	Respite Facility - Out-of-Home
	Live-In Caregiver	312	Live-In Caregiver
	Homemaker	313	Homemaker
	Housing Access Supports	314	Housing Access Supports
	Financial Management Service	315	FMS Fiscal Agent
		316	FMS Co-Employer
		317	FMS Fiscal/Employer Agent
	Community Living Supports	320	Community Living Supports (Individual and Agency)
		321	Residential Facility

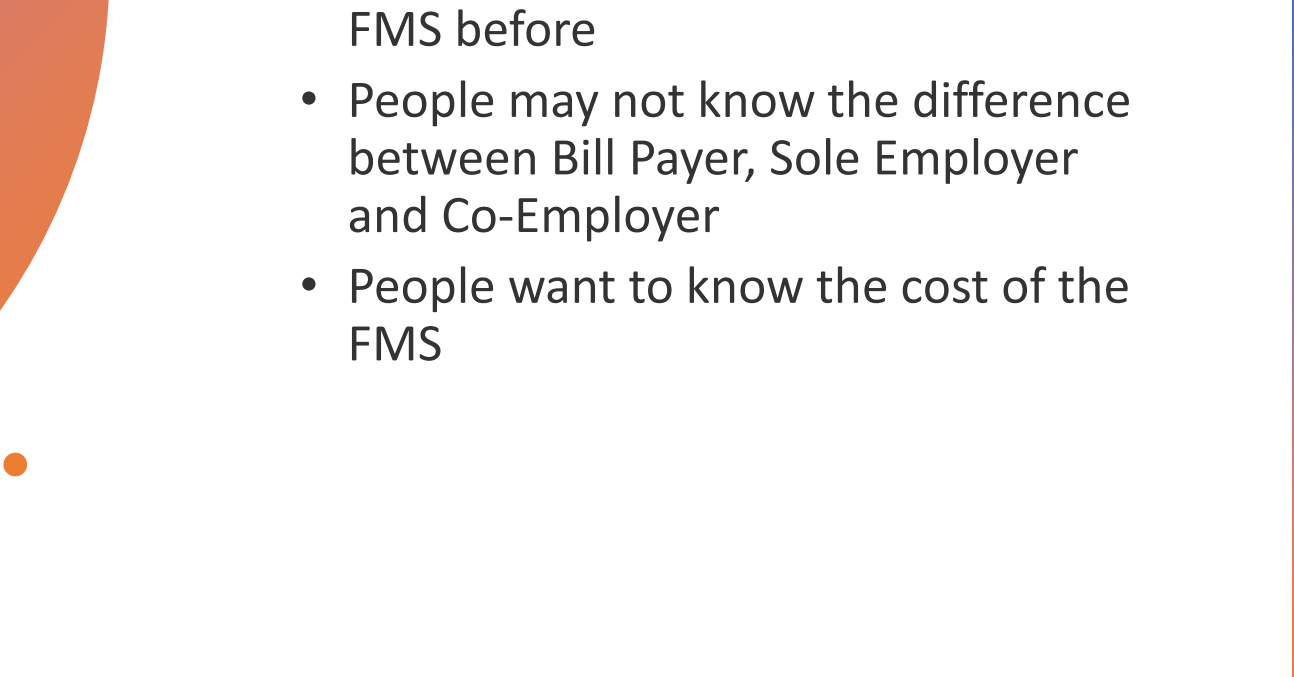
Employment & Community Participation (331 - 355)	Community Integration Supports	331	Community Integration Supports
	Participant-Directed Goods and Services	333	Participant-Directed Goods and Services
	Individual Training and Education	334	Individual Training and Education
	Employment Supports	335	Employment Supports
	Technology Services	336	Technology Supports
	Transition/Set Up Expenses	337	Transition Set-Up Expenses
	Non-Medical Transportation	338	Non-Medical Transportation
	Prevocational Supports	339	Prevocational Supports
	Independent Facilitator	340	Independent Facilitator

Health and safety (356 - 399)	Environmental Accessibility Adaptation	356	Environmental Accessibility
	Acupuncture Services	357	Acupuncture Services
	Personal Emergency Response Systems (PERS)	358	Personal Emergency Response Systems
	Home Health aide	359	Home Health Aide
	Communication Support	360	Communication Support
	Skilled Nursing	361	Skilled Nursing
	Nutritional Consultation	362	Nutritional Consultation
	Crisis Intervention and Supports	363	Crisis Intervention and Supports
	Behavioral Intervention Services	364	Behavioral Intervention Services
	Specialized Medical Equipment and Supplies	365	Specialized Medical Equipment and Supplies
	Family/Consumer Training	366	Family/Consumer Training
	Dental Services	367	Dental Services
	Lenses and Frames	368	Lenses and Frames
	Optometric-Optician Services	369	Optometric-Optician Services
	Psychology Services	370	Psychology Services
	Training and Counseling Services for Unpaid Caregivers	371	Training and Counseling Services for Unpaid Caregivers
	Speech - Hearing and Language	372	Speech - Hearing and Language
	Chiropractic Services	373	Chiropractor
	Massage Therapy	374	Massage Therapist
	Occupational Therapy	375	Occupational Therapy
	Physical Therapy	376	Physical Therapy
	Vehicle Modifications and Adaptations	377	Vehicle Modifications and Adaptations
	Family Support Services	378	Child Day Care Facility



The Financial Management System

By Lisa Hartley

- Why this topic?
 - The Financial Management System (FMS) is the only service required in Self Determination
 - There are lots of pieces to the FMS, so it can be complicated
 - Many people have never used an FMS before
 - People may not know the difference between Bill Payer, Sole Employer and Co-Employer
 - People want to know the cost of the FMS
- 

Financial Management System (FMS)

FMS is the only service provider who must be vendored with the regional center

FMS supports with Spending Plan

FMS uses spending plan to pay for services and supports

FMS provides Monthly Summaries to participants

FMS checks Background and Qualifications

Choosing the Right FMS: WHAT DO YOU NEED?

Do you need help with employees?

Do you need more help in making sure you keep within your spending plan?

Do you just need them to pay the bills and send you statement?

Do you need to buy goods and supplies?

Choosing the Right FMS: WHAT DO YOU WANT?

Full responsibility for your employees?

Help with the business of having employees?

Liability or no liability?

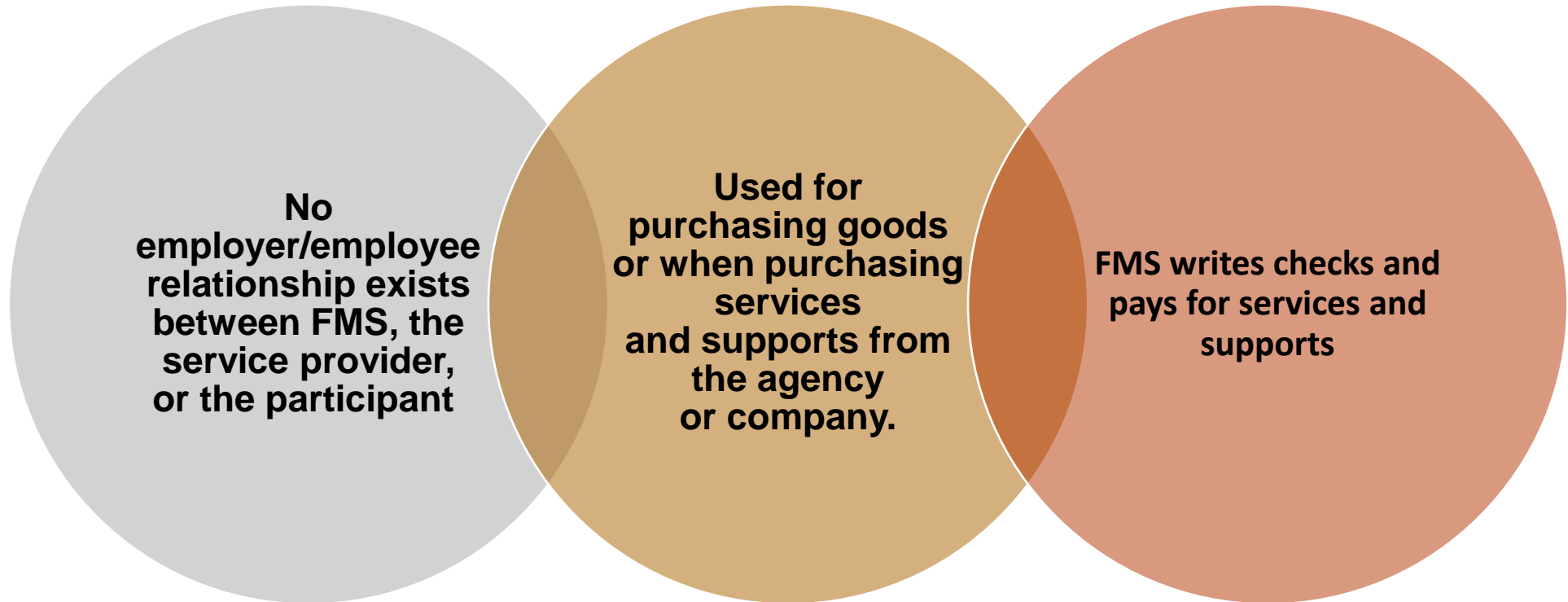
FMS MODELS

**BILL PAYER (FISCAL
AGENT)**

**SOLE EMPLOYER
(FISCAL/EMPLOYER
AGENT)**

CO-EMPLOYER

Bill Payer (Fiscal Agent)



Bill Payer (Fiscal Agent)

EXAMPLES:

- Taking a class from the parks and recreation department
- Purchasing of diapers or wipes
- Paying for transportation to a company
- Hiring a company to supply you workers in your home
- Working with an agency to help you apply for a job
- Providers who already work with your regional center

Sole Employer (Fiscal/Employer Agent)

PARTICIPANT

- Direct Employer of the workers
- Obtains any necessary insurances related to employment (ex. Worker's compensation)
- More control over services and supports

FMS

- Checks provider's background and qualifications
- Processes payroll
- Helps participant abide by all applicable employment laws

Co-Employer

PARTICIPANT

- Shares responsibility as an employer with my FMS
- Maintains ability to hire and terminate employees with input from FMS provider

FMS

- Shares being the employer
- Employer of Record and maintains primary employer liability
- Follows all applicable laws
- Handles necessary insurances related to employment
- Checks background and qualifications
- Pays the bills

Maximum Financial Management Services (FMS) Rates

FMS Model	Number of Services	Max Rate per Month
FMS as Bill Payer (Fiscal Agent)	1-3	\$50
	4-6	\$75
	7+	\$100
Participant as Sole Employer (Fiscal/Employer Agent)	1-2	\$110
	3-4	\$125
	5+	\$150
Participant & FMS as Co-Employers	1-2	\$125
	3-4	\$140
	5+	\$165



INTRODUCING JASON

By Diana & Lisa

A little bit about Jason

Jason is 39 years old

Jason **lives** independently and receives Supported Living Services

Jason attends some junior college classes. He enjoys theatre arts and participating in the church choir.

Jason has a diagnosis of Autism Spectrum Disorder and Bipolar Disorder and was recently diagnosed with Diabetes.

Jason receives crisis support services to address behaviors associated with his diagnoses.

People in Jason's life:

- Mother and Father
- 2 Brothers
- Neighbor
- Therapist
- Pastor
- Service Coordinator (SC)

Jason would like to increase his social activity by participation in Improv theater. He would also like to have a girlfriend and obtain his driver's license.

Jason's Path To Self- Determination: SDP Orientation, PCP and IPP

❑ **Self-Determination Orientation**

❑ **Person-Centered Plan:** Jason used a contracted agency to help him to develop his PCP. The PCP highlighted the goals important to Jason. The PCP created a long-term vision of what is important for Jason to be successful and have a meaningful life. For example, Jason's PCP indicated that Jason wants a career in theatre arts, would like to learn to drive and get married one day.

❑ **Individual Program Plan:** After Jason had his PCP developed, he scheduled his IPP meeting to discuss how the goals in his PCP could be developed into his IPP.

❑ **Important:** Sometimes language in the PCP is not congruent with language in the IPP. The PCP is the long-term plan, whereas the IPP is a short-term plan that allows Jason to breakdown his broader goals into more tangible steps.

Exploring Jason Generics and Natural support

Jason's Generic Supports:

A. Supplemental Social Security

B. IHSS- 50 hours for household maintenance

C. Discounted Utility Program

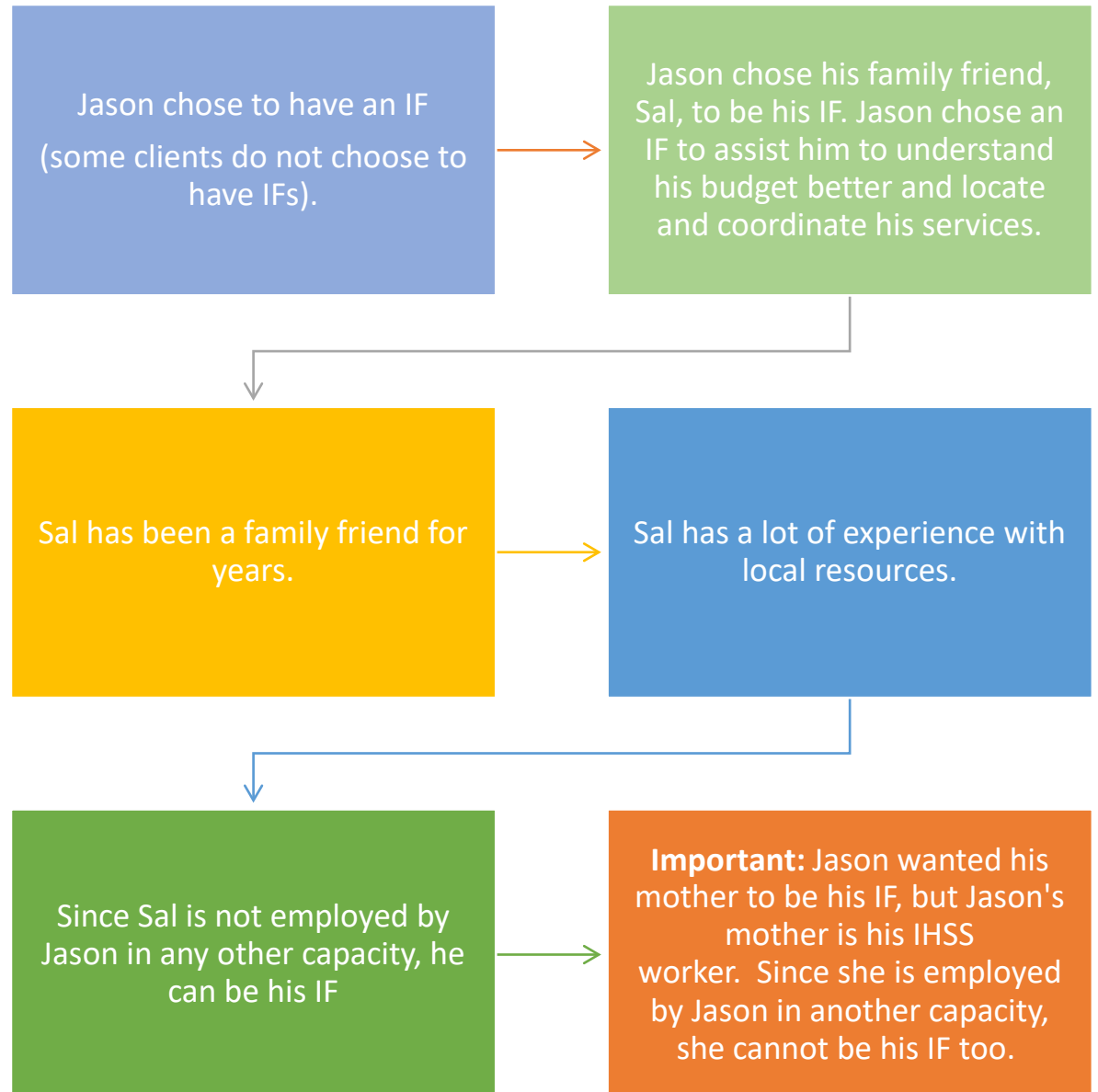
D. Medi-cal/Cal Fresh

Jason's Natural Supports: Parents, church friends, etc.

Parents provide transportation weekly to his theatre class in the evenings

Church provides a weekly free farm box.

Jason's Independent Facilitator



Jason's Unmet Needs, New Needs & Uncovered Services

Unmet Needs:

Crisis Support

New Needs:

Non- Medical Transportation

Unfunded SDP Services:

Jason requested that his SDP budget cover a new experimental therapy to treat his bi-polar condition but since this therapy is experimental and not evidenced-based, Jason's SDP budget cannot fund this experimental therapy.

Generic Resource:

Jason has SSI and Medi-Cal and these services are considered generic services not covered through SDP

Jason's FMS Decision.

- As part of the SDP process, Jason was given a list of FMS vendors that he can use for his SDP budget.
- Jason chose the **Co-Employer Model**, as he felt this model allowed him to participate in the hiring process without being solely responsible or liable for any issues that may arise.
- Jason, will have 5 services (SLS, Crisis Support, Non-Medical Transportation, IF & FMS). Jason total FMS cost will be \$165.00 per month. See FMS rates chart.

Expenditure Report & Certified Budget

Expenditure Report: Prior to the IPP meeting, Jason's SC sent Jason his 12-month expenditure report detailing the last 12 months of Jason's expenditures. Jason's expenditure report included Housing support (HCC), SLS and Crisis Support. His total authorized expenditures totaled \$80,144.00.

Certified Budget: Jason's SC developed Jason's Certified Budget based on the 12-month expenditure report and any new needs and unmet needs that were identified through the IPP process.

	A	B	C	D	E	F	G	H	I	J
1	SELF-DETERMINATION PROGRAM									
2	PARTICIPANT BUDGET WORKHEET									
3	Date prepared:		3/28/2022				Budget Start Date:		06/01/22	
4	Service Coordinator		Suzie Smith				Budget End Date:		05/31/23	
5	Consumer Name		Jason							
6	UCI #		4444444							
7	Date of Birth:		05/10/83							
8										
9										
10	The Individual Budget should be calculated and certified in conjunction with, or prior to, development of the Individual Program Plan (IPP) and Spending Plan for SDP.									
11	BASELINE AMOUNT: Determine the baseline annual expenditures									
12	\$80,144.00		TOTAL AMOUNT ON REPORT							
13	<i>*Enter the total amount paid by a Regional Center using the 12-month expenditure report</i>									
14										
15	Annualization Table: Determine the costs for services that should be annualized (if any)									
16	<i>Services identified in the current IPP and in the Baseline Amount reflecting less than 12 months of payment made to the provider; or where no payment has yet been made to the provider</i>									
17	<i>Leave this table blank if this does not apply</i>									
18	Service Provided/Funded for less than 12 months		Service Code	Does this service require an "annualized" cost to determine the SDP budget?	UNFUNDED units during the year	Rate per unit	Annual unused amount			
19	Crisis Support		17	YES	9	\$ 3,000.00	\$ 27,000.00			
20							\$ -			
21							\$ -			
22							\$ -			
23							\$ -			
35	TOTAL ANNUALIZATION AMOUNT						\$ 27,000.00			
36										

Group Contract Table: Determine costs of services purchased under group contract:

An example would be transportation services. Leave this table blank if this does not apply.

Type/Description of Service	Agency Name	Annual Group Cost	Number of individuals served	Adjusted Cost for 12 months of service (monthly group cost divided by number of individuals served)
TOTAL GROUP CONTRACT AMOUNT				\$ -

Newly Identified Needs Table: Determine the cost for newly identified needs and services

These are services that were recently identified and not recorded in previous tables. Leave this table blank if this does not apply.

Describe Change in Circumstance / New Need	Service Code that <u>would</u> have addressed the need (ex: 862)	Average Rate (ex: \$16.50/hr, \$65/day, etc)	# of Billing Units per year	Annual billing cost
Non-Medical Transportation	875	\$ 15.00	104	\$1,560.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
TOTAL NEWLY IDENTIFIED NEEDS AMOUNT				\$1,560.00

Calculate the Budget Subtotal: Adding the total amounts from all previous tables.

Baseline Amount	\$ 80,144.00
Annualization Table Total	\$ 27,000.00
Group Contract Table Total	\$ -
Newly Identified Needs Table Total	\$1,560.00
SUBTOTAL	\$ 108,704.00

Non-Continuing Services: Determine the cost of services that are not expected to continue, regardless of participation in the SDP

Leave this table blank if this does not apply.

Service Description	Amount
Housing Choices Coalition	\$2,600
TOTAL NON-CONTINUING SERVICES AMOUNT	\$ 2,600.00

Continuing Services Handled Outside of the Individual Budget: Cost of services that are on-going but will be handled outside of the individual budget or the spe

Leave this table blank if this does not apply.

Service Description	Amount
SSI/SSP Restoration	\$684.00
TOTAL CONTINUING SERVICES AMOUNT	\$ 684.00

Calculate the annual individual budget:

Budget Subtotal	\$ 108,704.00
Non-Continuing Services Total	\$ 2,600.00
Continuing Services Not a Part of the Individual Budget Total	\$ 684.00
SUBTOTAL	\$ 3,284.00
Self-Determination Annual Individual Budget	\$ 105,420.00

Spending Plan

Jason's SC sent him a copy of his Certified Budget. Jason's Independent Facilitator helped him to develop the Spending Plan using the Certified Budget.

SELF-DETERMINATION PROGRAM**SDP SPENDING PLAN WORKSHEET**

Date prepared:	3/28/2022	Budget Start Date	06/01/22
Service Coordinator:	Suzie Smith	Budget End Date	05/31/23
Consumer Name	Jason		
UCI #	4444444		
Date of Birth:	5/10/1983		

SDP Services

IPP Objective	Vendor Number	SDP Services	Sub	BUDGET CATEGORY	SDP Funded	Service Provider	# of Units	Frequency	Unit cost	Annual Units	Total	Justification
#1	HS1089	FMS Co Employer	316	1 - Living Arrangement	Yes	FMS VENDOR	1	Monthly	\$165.00	12	\$1,980.00	New Need
#2	HS1089	Crisis Intervention and Supports	363	3 - Health & Safety	Yes	Crisis Support Inc.	1	Monthly	\$3,000.00	12	\$36,000.00	Continuation of Services
#3	HS1089	Non-Medical Transportation	338	2 - Employment & Community Participation	Yes	Transport United	104	Yearly	\$15.00	104	\$1,560.00	New Need
#4	HS1089	Independent Facilitator	340	2 - Employment & Community Participation	Yes	Friend Sal	2	Monthly	\$75.00	24	\$1,800.00	New Need
#5	HS1089	Community Living Supports	320	1 - Living Arrangement	Yes	SLS	1	Yearly	\$64,080.00	1	\$64,080.00	Continuation of Services
										0	\$0.00	
										0	\$0.00	
										0	\$0.00	

Total Spending Plan**#####****SPENDING PLAN SUMMARY BY BUDGET CATEGORY:**

1 - Living Arrangement	\$ 66,060.00
2 - Employment & Community Participation	\$ 3,360.00
3 - Health & Safety	\$ 36,000.00
TOTAL	\$ 105,420.00

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QUESTIONS?