

SDP Implementation Timeline

1. Participant/family notifies SC of desire to enroll in SDP. SC is to respond within two working days providing SDP resources including instructions on how to register, enroll and complete mandatory SDP orientation.

2. Participant/Family completes ACRC LMS SDP Orientation requirement. 1 hour 20 minutes

If translation for orientation is needed in a language other than English, Spanish or Korean, participant/family to notify SC.

If an adult participant did not attend the Orientation and had designated a family member or friend attend in their place, a planning team meeting (PTM), inclusive of the SC, participant and designee, shall be convened to review the basic concepts of SDP (to the best of the client's ability to understand the material). SC is to find availability to convene PTM within 15 days (or later at the request of the participant).*

3. Participant/family notifies SC upon completion of orientation and intent to move forward and within 3 working days the SC will schedule a PTM to discuss the current IPP goals, unmet needs and person-centered planning ([DDS Directive re: Payments for Initial Person Centered Planning Services](#)), as well as provide and review the initial budget (12-month expenditure report). The date and time of this meeting will be mutually agreed upon by the planning team members.

4. After the completion of the aforementioned PTM, the SC and CSM will review the information and submit the agreed upon initial budget to ACRC Accounting Department to request a copy of the Individual Budget Calculation and Certification Tool (IBCCT). This will be done within one week of the planning team meeting.

5. The Individual Budget Calculation and Certification Tool (IBCCT) is then generated by accounting within 4 working days of the request. The SC then shares the completed IBCCT with the planning team for a final review and to have the participant/representative sign off for certification, as well as the SC. If this PTM determines revisions need to be made to the IBCCT, the SC will need to reconvene the team within 15 days in order to allow time to review the following areas: services continuing with changes in hours/units and/or New Services/Unmet needs & Change in Circumstance. The SC will present the updated IBCCT with any revisions to the planning team when reconvened.

6. It is suggested that participants/family identify their FMS agency. Once FMS is selected the FMS will verify that the identified providers are qualified.

7. It is suggested that participants/family create their spending plan within 60 days of their budget certification*. The spending plan must identify the cost of each service and support that will be purchased with regional center funds. The total spending plan amount cannot exceed the certified individual budget amount.

8. HCBS Final Rule Review and Certification (if applicable): All SDP-funded services must comply with the HCBS Final Rule. Some providers will be presumed to be in compliance, and others will need to be assessed by the participants, FMS, and the Regional Center.

9. The final IPP will be developed and agreed upon by the planning team within 30 days of completion of the spending plan. Once all the requirements for participation have been met, the planning team is to identify a date for the client to transition from Traditional services to SDP. SC will create the POS to have a start date to match the spending plan start date. Once approved, Accounting will notify the SC & the FMS Provider that the budget is complete.

**Note: Each planning team will need to identify their own timeline for some of these activities.*