



Self Determination Program Transition Check-List

Get Started	Person Centered Plan (PCP)	Budget	FMS/Spending Plan	Transition IPP & enter SDP
<ul style="list-style-type: none"> ○ Attend Orientation ○ Email your certificate to your Service Coordinator ○ Find a Person-Centered Planner and Self-Directed Support ○ Ask for an Addendum for transition support (Independent Facilitator) ○ Interview Financial Management Services (FMS) ○ Request a 12-month spending report (SC) ○ If known unmet needs: ask for assessment (SC) 	<ul style="list-style-type: none"> ○ Pre-plan ○ Have a PCP Meeting ○ Finalize the PCP ○ Send PCP to Service Coordinator ○ Request IPP meeting for budget (they have 30 days) 	<ul style="list-style-type: none"> ○ IPP meeting for budget <ul style="list-style-type: none"> • Discuss unmet needs or changes • Review expenditure report for unused services • Share assessment for new services (if requested) ○ When team agrees on budget, RC and participant sign 	<ul style="list-style-type: none"> ○ Complete spending plan/verify all items relate to IPP goal ○ Send spending plan to Service Coordinator to verify ○ Regional Center verifies spending plan When you have a certified budget and draft spending plan: ○ Pick FMS model ○ Select FMS/notify SC ○ Complete intake with FMS ○ Inform current providers and set up with FMS ○ Background checks for employees ○ Have employees set up with FMS 	<ul style="list-style-type: none"> ○ Complete a transition IPP <ul style="list-style-type: none"> • Ensure that PCP goals are included • Make sure all spending plans items are in the IPP. ○ Confirm all workers and services are ready for start date ○ Verify Purchase of Service (POS) are sent to FMS (by FMS due date) ○ Confirm FMS has POS and you are transitioned Live your Self-Determined Life!!!