



Self Determination Program Transition Check-List

Get Started	Person Centered Plan (PCP)	Budget	FMS/Spending Plan	Transition IPP & enter SDP
Attend Orientation	Pre-plan	IPP meeting for budget	Complete spending plan/verify all items relate to IPP goal	Complete a transition IPP goals are included
Email your certificate to your Service Coordinator	Have a PCP Meeting	<ul style="list-style-type: none"> • Discuss unmet needs if no past services have been provided 	Send spending plan to Service Coordinator to verify	<ul style="list-style-type: none"> • Ensure that PCP goals are included
Find a Person-Centered Planner and Self-Directed Support	Finalize the PCP	<ul style="list-style-type: none"> • Review expenditure report for unused services 	Regional Center verifies spending plan	<ul style="list-style-type: none"> • Make sure all spending plans items are in the IPP.
Ask for an Addendum for transition support (Independent Facilitator)	Send PCP to Service Coordinator	<ul style="list-style-type: none"> • Share assessment for new services (if requested) 	When you have a certified budget and draft spending plan:	Confirm all workers and services are ready for start date
Interview Financial Management Services (FMS)	Request IPP meeting for budget (they have 30 days)	<ul style="list-style-type: none"> • Discuss any changes in needs, resources, or circumstances 	Pick FMS model	Verify Purchase of Service (POS) are sent to FMS (by FMS due date)
Request the amount of the last 12-months of authorized services		When team agrees on budget, RC and participant sign	Select FMS/notify SC	Confirm FMS has POS and you are transitioned
If known unmet needs: ask for assessment (SC)			Complete intake with FMS	Live your Self-Determined Life!!!
			Inform current providers and set up with FMS	
			Background checks for employees	
			Have employees set up with FMS	