

April 14, 2025

G-2025-Case Management-001

TO: REGIONAL CENTER EXECUTIVE DIRECTORS

SUBJECT: REMOTE PLANNING TEAM MEETINGS

This letter is to provide information about an amendment to Welfare and Institutions Code (WIC) Section 4646(f) and Government Code (GC) Section 95020(c) (through [Assembly Bill 162](#)), regarding the provision of remote planning team meetings. This amendment became effective July 2, 2024.

This letter also provides guidance to track service coordination targeted case management (TCM) electronic meetings as Part of Title 19 notes using the Uniform Fiscal System (UFS) and the SANDIS case management system. This functionality tracks compliance with in-person (face-to-face) meeting requirements.

#### Statutory Changes

##### **WIC Section 4646(f)**

Previous Requirement (through 7/1/24)	New Requirement (effective 7/2/24)
Until July 1, 2024, meetings about services and supports from the regional center, including meetings to create or update an individual program plan, must be held remotely if the individual requests it. If the individual cannot request it themselves, their parent, legal guardian, conservator, or authorized representative can ask for the meeting to be remote.	Meetings about services and supports from the regional center, including meetings to create or update an individual program plan (IPP), must be held remotely if the individual requests it. If the individual cannot request it themselves, their parent, legal guardian, conservator, or authorized representative can ask for the meeting to be remote.
	<ul style="list-style-type: none"> <li><i>If the regional center has not had an in-person IPP meeting or visit with the individual in the past 12 months, they must hold an in-person meeting at a time and place that works best for the individual. If needed, their parent, legal guardian, conservator, or representative can also give input on the location and time. This requirement should not slow down or interfere with creating or updating the IPP or approving and receiving services and support.</i></li> <li><i>The requirement for in-person meetings will stay in place while the department reviews its</i></li> </ul>

	<i>effectiveness. This review will be done in collaboration with stakeholders. The department will update the Legislature on the review's progress by January 10, 2026, and will submit the final review by May 14, 2026.</i>
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**GC Section 95020(c)**

Previous Requirement (through 7/1/24)	New Requirement (effective 7/2/24)
Until July 1, 2024, IFSP meetings must be held remotely if the parent or legal guardian requests it. Parents and legal guardians must be fully informed of their rights, including the right to bring someone with them to individualized family service plan (IFSP) meetings. This could be a family member, advocate, or peer parent, or all of them if they choose.	<p>Parents and legal guardians must be fully informed of their rights, including the right to bring someone with them to individualized family service plan (IFSP) meetings. This could be a family member, advocate, or peer parent, or all of them if they choose. Regardless of other laws, IFSP meetings must be held remotely if the parent or legal guardian requests it.</p> <ul style="list-style-type: none"> <li><i>If a regional center has not had an in-person meeting or visit with a family in the last six months, it must schedule one at a time and place that works for the parent, legal guardian, or authorized representative. This requirement should not slow down or interfere with creating or updating the family's service plan or getting the necessary services and support.</i></li> <li><i>The requirement for in-person meetings will stay in place while the department reviews how well it is working. This review will be done in collaboration with from stakeholders, will look at whether in-person. The department will update the Legislature on the review's progress by January 10, 2026, and will submit the final review by May 14, 2026.</i></li> </ul>

Regional centers must update policies and procedures to align with AB 162's statutory changes.

Tracking Remote Planning Team Meetings

The Department engaged SANDIS on the necessary programming to track remote visits. This is expected to be available for regional center use on May 1, 2025. Please use letter "R" Remote Meeting as a type of activity selection in the Title 19 notes system to track remote meetings. This activity type applies to meetings that are completed using Zoom, Teams or other videoconferencing platforms. This new selection is to be used prospectively starting June 1, 2025 and regional centers are not required to enter retroactive information.

If individuals and/or their families have questions regarding this correspondence, they should contact their regional center's primary liaison. Questions from regional centers should be directed to Tiffani Andrade, Assistant Deputy Director, Office of Community Operations, at (916) 654-3016, or by email at [Tiffani.Andrade@dds.ca.gov](mailto:Tiffani.Andrade@dds.ca.gov).

Sincerely,

*Original Signed by:*

ERNIE CRUZ  
Deputy Director  
Community Services Division

cc: Regional Center Administrators  
Regional Center Chief Counselors  
Regional Center Community Services Directors  
Association of Regional Center Agencies  
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