DDS

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December 3, 2025   D-2025-Case Management-002

TO: REGIONAL CENTER EXECUTIVE DIRECTORS

SUBJECT: QUARTERLY REPORTING ON INTAKE ASSESSMENTS

The purpose of this correspondence is to provide direction to regional centers about their responsibilities for quarterly reporting on intake assessments. Pursuant to Welfare and Institutions Code (WIC) Section 4435.1(f)(2), regional centers must follow the instructions in this letter regarding reporting the number of assessments and the length of time it took to determine eligibility.

Regional centers currently record information in SANDIS and use Status 0 for individuals who are being assessed for eligibility. When the assessment is complete, regional centers must update the status code to reflect assessment results. SANDIS captures the date of each status code change, which enables the Department to use SANDIS data to measure the length of time to determine eligibility.

The following procedure will obtain and validate this information:
1. The Department will obtain the information from SANDIS to the Client Master File (CMF) for all individuals exiting Status 0 each quarter.
2. At the beginning of the second month following each quarter, the Department will provide each regional center with its preliminary data via the RC Portal.
3. Each regional center must review the information for accuracy, and any inaccuracies shall be corrected in SANDIS prior to the data transmission date for that month. See the Attachment to this letter for the 2025 and 2026 Monthly Transmission Schedules.
4. At the beginning of the following month, the Department will provide each regional center with its checked data via the RC Portal.

For the July 1, 2025 to September 30, 2025 (Quarter 1) reporting period, the Department will provide *preliminary data* to regional centers in early December and regional centers must complete any corrections before the December transmission date. The Department will provide Quarter 1 *checked data* to regional centers in January 2026. Quarter 2 and all subsequent reporting will follow this timeline:

Quarter	Reporting Period	Department Provides Preliminary Data	Regional Centers Complete Any Corrections	Department Provides Checked Data
Quarter 2	October 1 – December 31	Early February	Before the February transmission date	March
Quarter 3	January 1 – March 31	Early May	Before the May transmission date	June
Quarter 4	April 1 – June 30	Early August	Before the August transmission date	September

To support accuracy, regional centers must:

- Review data entry procedures and revise as necessary to ensure changes to Status 0 reflect the dates of: (1) the decision to initiate an assessment, and (2) determination of eligibility based on the completed assessment, or for Early Start the date of the initial Individualized Family Service Plan.

- Review the SANDIS Nightly Audit report (RC044ERR) and make necessary corrections to client data for transmission to the Department in the monthly file. Refer to the SANDIS help desk for assistance with the Nightly Audit report.

- Review the monthly Expanded CMF Exception Report (CMF EER) located on the Application Support Team (AST) SharePoint site. Follow instructions provided on the site to make corrections to client files containing errors. Failure to make corrections on your client file will prevent the CMF from updating and will cause inaccurate dates impacting intake timeliness reports. Additional information to assist regional centers can be found in the Department issued Technical Bulletin (TB-519) on the AST SharePoint site.

As a standardized intake process is developed, the Department will issue further guidance regarding procedures to advance data quality and consistency. If you have questions about this correspondence, please contact intake@dds.ca.gov.

Sincerely,

Original Signed by:

MICHI A. GATES, Ph.D.
Chief Deputy Director, Program Services

Attachment

cc: Regional Center Administrators
        Regional Center Directors of Client Services
        Regional Center Community Services Directors
        Association of Regional Center Agencies