

Self-Determination Program (SDP) Updates Meeting

December 12, 2025



Housekeeping



Interpretación en español: haga clic en el globo blanco en la parte inferior de la pantalla con la etiqueta "Interpretation." Luego haga clic en "Spanish" y seleccione "Mute original audio"



ASL interpreters have been "Spotlighted" and live closed captioning is active

- Raise hand, say first name and **speak slowly**



This meeting is being recorded

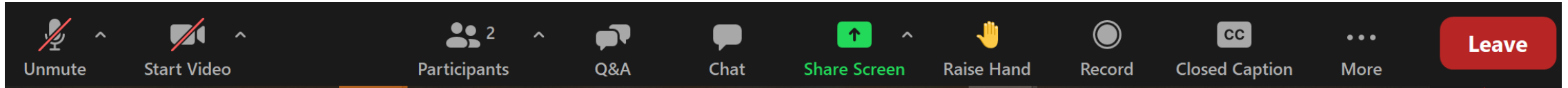


Materials are available at: [English Materials](#)



Submit written comment via email to: SDP@dds.ca.gov

Zoom Tips



All attendees
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Chat is not
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Please use the
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Attendees can
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Leave the
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- For attendees, your video and microphone will not be available
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- Features will vary based on the version of Zoom and device you are using
- Some Zoom features are not available for telephone-only participants

Agenda

1. Review Directive

- Self-Determination Program: Initial Individual Budgets and Spending Plans.

1. Resources

2. Questions & Answers

Self-Determination Program: Initial Individual Budgets and Spending Plans



Directive

On **November 25, 2025**, the Department of Developmental Services issued a directive: [Initial Individual Budgets and Spending Plans](#).

This directive implements changes to the Self-Determination Program required by Assembly Bill 143 (2025).

This directive provides direction to regional centers on how to:

1. calculate initial individual budgets.
2. certify spending plans.
3. transfer of funds for individuals' spending plans in the Self-Determination Program.

Directive Requirements

An individual budget is developed based upon the person-centered Individual Program Plan (IPP).

The IPP includes the services and supports the individual and their IPP team agree are needed to meet the individual's IPP goals.

An individual budget must be built based on the services the regional center would fund in the traditional service delivery model. It must include the amount of funding an individual will have to purchase the services and supports needed to meet their IPP goals.

Directive Requirements

The IPP team is required to talk about unmet needs for individuals who have no or low authorized services.

- Low authorized services are defined as less than \$2,000 of authorized services for the most recent 12 months.

Directive Requirements

For an initial individual budget, the regional centers are required to use the following formula:

1. Begin with the total amount of services the regional center purchased for the individual during the most recent 12 months in the traditional service delivery model.
2. Add any new services the IPP team authorized in the IPP that did not have a purchase of service authorization;
3. Subtract any services the regional center will pay for outside of the SDP; and
4. Subtract any one-time expenses that were previously authorized.

Directive Requirements

For an individual budget adjustment, the regional center must confirm that two conditions are met before any changes can be made. Those two conditions are:

1. the IPP team must determine that the individual's needs, circumstances, or resources have changed and;
2. the adjustment would have happened even if the individual was not in the SDP.

In addition, when setting rates for services included in the individual budget, the regional centers must follow the [September 2022 Adjustments to Individual Budget](#) directive.

Once the individual budget has been established, a spending plan must be created.

Directive Requirements

The spending plan needs to identify the specific services and supports that will be purchased using the individual budget.

Regional centers are required to certify each participant's spending plan. Regional centers must make sure that all goods and services:

1. support the goals in the individual's IPP.
2. are used from available generic services like Medi-Cal, In-Home Support Services (IHSS), the Department of Rehabilitation, or school districts.
3. are eligible to receive federal funding and are approved by Centers for Medicare and Medicaid Services (CMS).

Directive Requirements

For spending plan adjustments that include transfer of funds between services codes and/or budget categories, the individual's regional center or IPP team needs to approve the adjustment before any transfer of funds can be made.

Transfers can be made anytime during the individual's current individual budget year.

Directive Requirements

Once a spending plan has been certified by the regional center, the regional center is required to give timely approval and notification to the individual's Financial Management Service vendor. This means within three business days of IPP team finalizing changes to spending plan.

This requirement exists as outlined in the Department's [September 2022 Financial Management Services Payments and Notifications](#) directive. It was also put into law by Assembly Bill 143.

Resources



Resources

Directive:

- [Self Determination Program Initial Budgets and Spending Plans](#)

Individual Program Plan:

- [Individual Program Planning](#)
- [Individual Program Plan Person-Centered Planning Video Toolkit](#)

Services funded outside of the individual budget:

- [Self-Determination Program Updated Goods and Services Enclosure B](#)
- [Self-Determination Program Updated Goods and Services](#)

Resources

Individual Budget Adjustments:

- [Self-Determination Program - Adjustments to Individual Budget](#)

Spending Plan Development:

- [Self-Determination Program Service Definitions](#)
- [Self-Determination Program Service Codes by Budget Category](#)
- [Self-Determination Program Updated Goods and Services](#)
- [Self-Determination Program Updated Goods and Services Enclosure A](#)
- [Self-Determination Program Updated Goods and Services Enclosure B](#)

Resources

Timely Authorizations to Financial Management Services Vendor

- [Self-Determination Program - Financial Management Services Payments and Notifications](#)

The Office of Developmental Services Ombudsperson

- Email: Ombudsperson@dds.ca.gov or Phone: (877) 658-9731

Department of Developmental Services SDP Branch

- Email SDP@dds.ca.gov

Questions and Answers

Additional questions

Email SDP@dds.ca.gov

