

SDP ENROLLMENT CHECKLIST

1

Orientation



- ☐ Attend Orientation Part A
- ☐ Attend Orientation Part B
- ☐ Email Service Coordinator both Orientation Certificates

2

Pre-Enrollment Support



- ☐ Select Pre-Enrollment Support (PCP and O99)
- ☐ Let Service Coordinator know who you selected

3

Person-Centered Plan



- ☐ Pre-Planning
- ☐ PCP Meeting
- ☐ Review and Finalize
- ☐ Send PCP to Service Coordinator

4

Budget



- ☐ Request Budget Meeting in writing
- ☐ Request 12 month Expenditure Report
- ☐ Budget Meeting/Share PCP
- ☐ Final Budget Signatures
 - ☐ Participant
 - ☐ Regional Center

5

Spending Plan



- ☐ Create Spending Plan
 - ☐ All items meet requirements
 - ☐ Employer Burden Included
 - ☐ Include other employee costs
- ☐ Spending Plan Signatures
 - ☐ Participant
 - ☐ Regional Center

6

Financial Management Service



- ☐ Select FMS Model
- ☐ Interview FMS
- ☐ Provide copies of budget and spending plan
- ☐ Complete Intake
- ☐ Notify Service Coordinator FMS Selected
- ☐ Start Employee background checks

7

IPP & Transition



- ☐ Complete IPP
- ☐ Ensure workers/providers are ready to start on transition date
- ☐ Verify Authorizations are in place

NOTE: Steps 2 & 3 are optional but highly recommended