

# Self-Determination Program Orientation Part B

LAST UPDATED

April 2026



# Housekeeping



For “**Insert language**” interpretation: click on the white globe at the bottom of the screen labeled “Interpretation.” Then click on “**Insert language**” and select “Mute original audio.”



Closed Captioning is on.

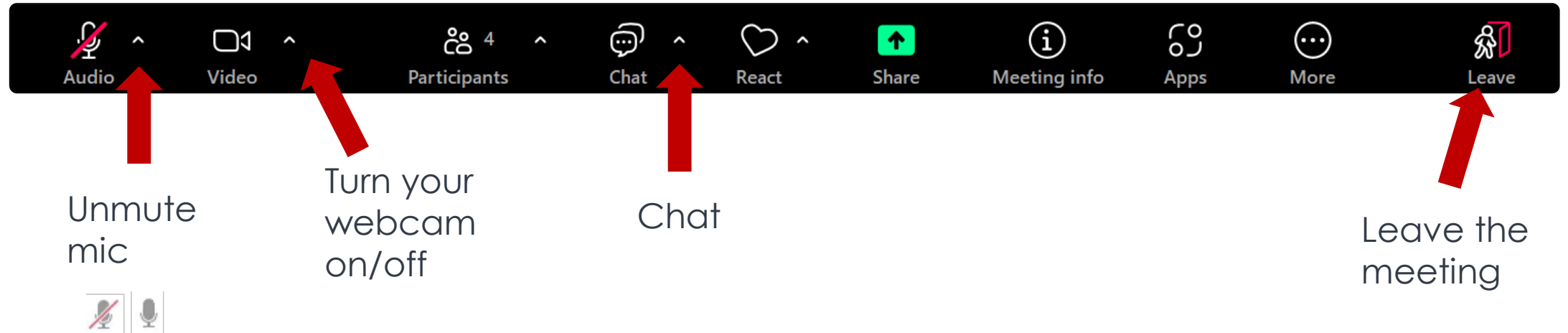


**Please keep cameras on.**



Materials are available at: [SCDD https://scdd.ca.gov/sdp-orientation/](https://scdd.ca.gov/sdp-orientation/)

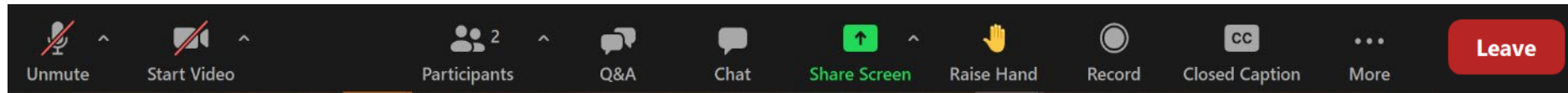
# Zoom Tips



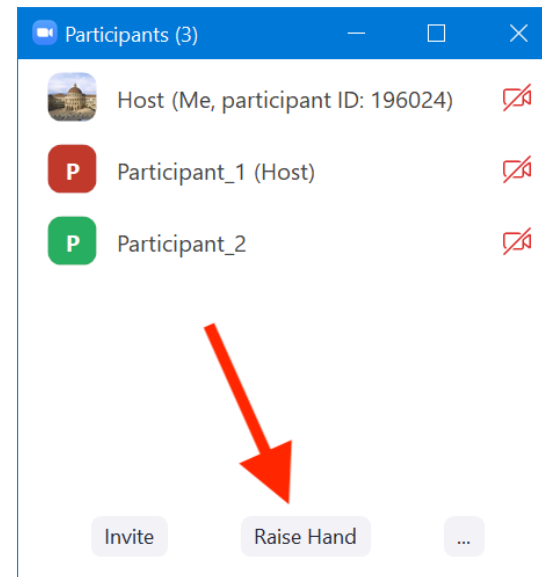
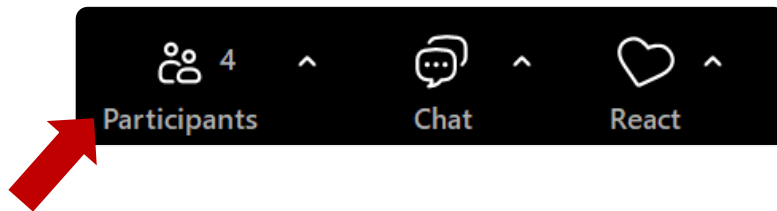
- Features will vary based on the version of Zoom and device you are using.
- Some Zoom features are not available for telephone-only participants.

# Providing Comments

Please press react to “Raise Hand” to make a comment.



You may need to click on “Participants”, and a new window will open where you can “Raise Hand.”





# Attendance Requirements

## **More than one adult attending together?**

- Type each adult's first and last name in the chat.
- State Council on Developmental Disabilities (SCDD) staff will confirm attendance (name & camera on) via chat.

## **Certificate instructions are provided at the end.**

- You must attend the entire session and provide the required information.

A decorative graphic featuring a light blue rectangular area on a white background. The light blue area is partially framed by dark blue horizontal bars at the top right and bottom left. Two orange circles are positioned at the top right and bottom left corners of the light blue area.

**Welcome Back**

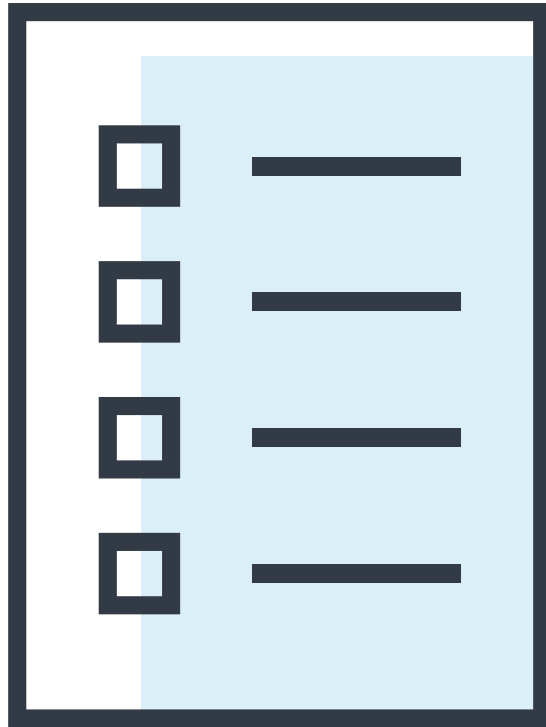
# Welcome Back!

This is the Self-Determination Program (SDP) Orientation Part B.

**You must have completed Part A before today.**



# Agenda



- Part A Key Takeaways
- Spending Plan
  - Independent Facilitators
- Financial Management Services Vendors and Models
- Getting Ready
- Resources and Next Steps



# Part A Key Takeaways

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title is in a large, bold, dark blue font.

# Part A Key Takeaways

**You decide** how to get your regional center services. You choose what is best for you.

The SDP gives you **more flexibility and choice** about the services and supports you use to meet your Individual Program Plan (IPP) goals.

You have **more responsibility** in the SDP.

- You manage your individual budget and spending plan
- You choose the SDP Financial Management Service (FMS) vendor and FMS model that is right for you
- You arrange your services and supports. This may include hiring, training, and firing staff



# Part A Key Takeaways

SDP Transition Supports are available after you complete both parts of the SDP Orientation.

**During this transition period, you will continue receiving services as stated in your current IPP.**



# Knowledge Check

Question:

Can you buy services and supports in SDP that do not match your IPP goals?

- A. Yes
- B. No
- C. Sometimes



# Knowledge Check

Answer:

B. No

The SDP gives you more flexibility and choice about the services and supports you use, but they need to help you meet your IPP goals.

# Spending Plan



The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A solid dark blue horizontal bar runs across the bottom of the slide.

# Spending Plan

**Is a written document that lists the services and supports** you will buy with your individual budget funds.

All services and supports must help you **meet your IPP goals**.

Your spending plan cannot be more than your individual budget amount.

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title 'Spending Plan' is located in the upper left quadrant of the slide.

# Spending Plan

Your spending plan must include:

- The **services and supports you need**
- How **often** you will get each service
- How **much they will cost**
- **Who** will provide them

You draft your spending plan, and if needed, you can get help from others.



# Spending Plan

Each service and support on your spending plan must:

- Help meet your IPP goals
- Not replace an available generic service
- Be eligible for federal financial participation
  - Match an [SDP Service Definition](#)
  - Have an [SDP Service Code](#)

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main content is on a white background.

# Spending Plan

**You work with your regional center and your SDP FMS vendor to finalize your spending plan.** Your regional center certifies your spending plan.

Services and supports on your spending plan **begin on your SDP start date.**

The Department is creating uniform processes and procedures for spending plans.



# Spending Plan

You have flexibility about who provides your services in SDP. **Service providers in SDP can be:**

- Regional center vendors
- Local businesses or community resources
- SDP Providers
- People you hire, your employees

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title is in a large, bold, dark blue font.

# Spending Plan Help

You can get help:

- **Finding service providers** for the services you need
- Learning how much each **service costs** and how much you can pay
- Getting **all available generic services** such as Medi-Cal, In-Home Supportive Services (IHSS), and school district

The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A solid dark blue horizontal bar runs across the bottom of the slide.

# Spending Plan Help

Individuals who can help you:

- **Your natural supports** – voluntary help you get from family, friends, neighbors, and others in the community
- **Your service coordinator** and other regional center staff
- **SDP Transition Supports**, paid for by your regional center include:
  - Person-Centered Plan
  - General Self-Directed Supports
  - FMS Transition Supports



# Services on Your Spending Plan

The services you choose must follow the Home and Community-Based Services (HCBS) Final Rule.

- The Final Rule has 10 requirements that help you choose **inclusive services**.

**Your regional center will confirm** your services follow HCBS Final Rule.



# Knowledge Check

Question:

Can you start using the services and supports on your **draft spending plan** as soon as provide it to your regional center?

- A. Yes
- B. No
- C. Not sure

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title 'Knowledge Check' is displayed in a large, bold, dark grey font.

# Knowledge Check

Answer:

B. No

Your regional center must certify your spending plan.

The services and supports on your spending plan begin on your SDP start date.

You, your regional center and your SDP FMS vendor must agree on your SDP start date.



# Independent Facilitator

Independent facilitator services are optional.

Once in SDP, they can help you:

- **Identify needs and goals** in your IPP
- Make **informed decisions** about your individual budget
- **Find and coordinate services** that help you meet your IPP goals



# Independent Facilitator

They cannot:

- Provide you any other service on your spending plan
- Work for, make money, or benefit from another service provider on your spending plan

**You pay for an independent facilitator with your individual budget funds.** Your individual budget cannot be increased to cover the cost of the independent facilitator.



# Independent Facilitator Services

Independent facilitators **must be trained in:**

- The principles of the SDP
- The Person-Centered Planning process
- Other responsibilities for planning services

**Independent facilitators must meet the Department's standards and certification requirements.**



# Knowledge Check

Question:

Can your Independent Facilitator choose your service providers for you?

- A. Yes
- B. No
- C. Sometimes

The slide features a decorative vertical bar on the left side, consisting of a light blue gradient background with a solid dark blue bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title 'Knowledge Check' is displayed in a large, bold, dark grey font.

# Knowledge Check

Answer:

B. No

Your Independent Facilitator can help find service providers. You make the final decision about who provides the services and supports on your spending plan.

# Spending Plan

You, your regional center, and your SDP FMS vendor work together to confirm services and supports:

Tasks	You	Your Regional Center	Your SDP FMS Vendor
Address your IPP goals	X	X	X
Not replace generic services	X	X	
Meet SDP Service Definitions	X	X	X
Eligible for federal financial participation		X	X
Meet HCBS Final Rule Requirements		X	X
Certify your spending plan		X	

A copy of your certified spending plan is attached to your IPP.



# Knowledge Check

Question:

Can you add any service you want to your spending plan?

- A. Yes
- B. No
- C. Sometimes



# Knowledge Check

Answer:

B. No

Your spending plan services and supports must:

- Help meet your IPP goals
- Not replace an available generic service
- Be eligible for federal financial participation, match an [SDP Service Definition](#) and have an [SDP Service Code](#)



# **Self-Determination Program: Financial Management Services Vendor and Models**



The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A solid dark blue horizontal bar runs across the bottom of the slide.

# SDP FMS Vendor

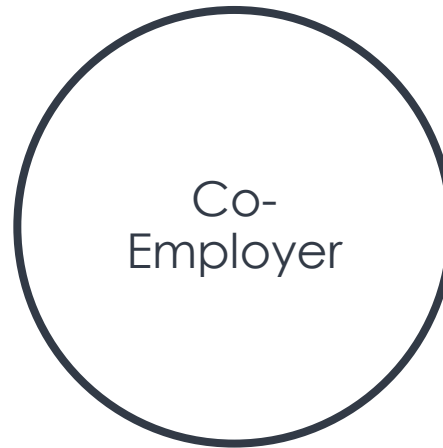
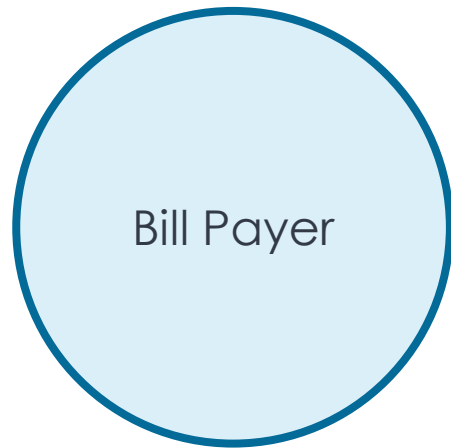
You must **choose an SDP FMS vendor** to be in SDP.

You need to:

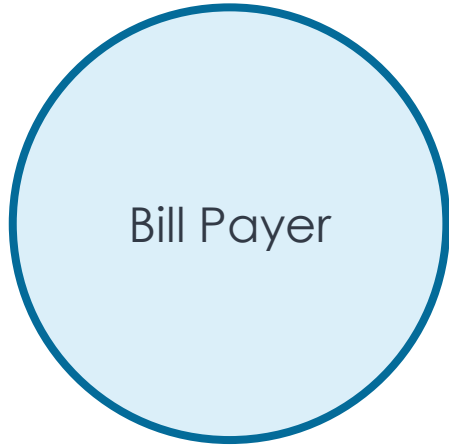
- Consider which FMS model will best support you and your **spending plan** services
- Confirm the SDP FMS vendor you want **serves your regional center**
- Confirm that the SDP FMS vendor, **supports the types of services** in your draft spending plan

# FMS Models

There are three different FMS models in the SDP. Each model has different responsibilities for you and your SDP FMS vendor.



# FMS Models



Use service providers to provide your services.

Cannot hire any employees.

SDP FMS vendor pays your service providers.



Can use service providers including employees to provide your services.

You and your SDP FMS vendor share responsibilities for your employees.

SDP FMS vendor pays your service providers including employees and other employment-related costs.



Can use service providers including employees to provide your services.

You are the sole employer and have more responsibilities.

SDP FMS vendor pays your service providers including employees and other employment-related costs.



# Knowledge Check

Question:

In SDP, you want to take art classes at the local art studio and hire an employee to assist you with personal care. Which FMS model(s) would work best for you?

- A. Bill Payer
- B. Co-Employer
- C. Sole Employer



# Knowledge Check

Answer:

B. Co-employer or C. Sole employer

You can you hire your own staff in both the Co-Employer or Sole Employer models. The difference between these two models is the amount of responsibility you have as the employer.

You cannot hire direct employees to provide direct care or other services in the Bill Payer model.

The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A solid dark blue horizontal bar runs across the bottom of the slide.

# SDP FMS Vendor Responsibilities

In all FMS models, they:

- Help you manage and monitor your individual budget and spending plan
  - Provide you and your regional center with your monthly individual budget statement
- Collaborate with you and your regional center to make sure your services and supports are on your spending plan before they pay for them
- Pay your service providers

# SDP FMS Vendor Responsibilities

In all FMS models, your SDP FMS vendor:

- Helps you check that your services
  - Meet the HCBS Final Rule requirement
  - Are eligible for federal financial participation
- Helps you check that your service providers
  - Have the required qualifications and/or training
  - Are paid a reasonable rate for the type of service they are providing



# SDP FMS Vendor Responsibilities

In the Co-Employer and Sole Employer models, your SDP FMS vendor:

- Educates you about employment laws you must follow. This includes:
  - Confirming minimum wage in your area
  - Understanding overtime, meal and break requirements
  - Paying the required taxes, insurances, and benefits



# SDP FMS Vendor Responsibilities

In the Co-Employer and Sole Employer models, your SDP FMS vendor helps you:

- Confirm your potential worker is eligible to work
- Hire your employees
  - Confirms required criminal background checks are passed **before your employee starts to work**
- And your employees complete the needed paperwork

Your SDP FMS vendor pays your employees directly.

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title 'Knowledge Check' is displayed in a large, bold, dark grey font.

# Knowledge Check

Question:

Can you pay for a service or support on your spending plan and then get reimbursed by the SDP FMS vendor for it?

- A. Yes
- B. No
- C. Sometimes



# Knowledge Check

Answer:

B. No

Your SDP FMS vendor must pay for all services and supports directly to your service providers. Your SDP FMS vendor cannot reimburse you.

The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A solid dark blue horizontal bar runs across the bottom of the slide.

# Your Responsibilities

In all FMS models, you:

- Choose an SDP FMS vendor that works with your regional center and that offers the FMS model you want
- Choose your service providers to help you meet your IPP goals
- Review your monthly individual budget statement
- Tell your SDP FMS vendor and your service coordinator if your service providers change
- Reach out to your service coordinator if you have any questions



# Your Responsibilities

In addition to your general responsibilities, in the Bill Payer Model you:

- Review and approve the invoices submitted for payment to your SDP FMS vendor



# Your Responsibilities

In addition to your general responsibilities, in the Co-Employer model you:

- Share employer responsibilities with your SDP FMS vendor
- Work with your SDP FMS vendor to confirm:
  - Your employees are qualified
  - Pass any required criminal background checks before they start working
  - You follow employment laws
- Review and approve the timecards and invoices for your services

Your SDP FMS vendor pays your service providers including employees.



# Your Responsibilities

In addition to your general responsibilities, in the Sole Employer Model you:

- **You are the employer of record** and must complete required paperwork
  - Including getting an Employer Identification Number
- Work with your SDP FMS vendor to confirm:
  - Your employees are qualified
  - Pass any required criminal background checks before they start working
  - You follow employment laws
    - Including required insurances like workers' compensation
- Review and approve the timecards and invoices for your services

Your SDP FMS vendor pays your service providers including employees.



# Knowledge Check

Question:

Your responsibilities are the same in all FMS models:

- A. True
- B. False



# Knowledge Check

Answer:

B. False

There are three different FMS models in the SDP. Each model has different responsibilities for you and your SDP FMS vendor.



# Service Provider Responsibilities

You can purchase your services from:

- Regional center vendors
- Local businesses or community resources
- SDP Providers

These types of service providers must:

- Meet the requirements of being a business
- Hire, supervise, and pay their employees to provide your services
- Pay required taxes and follow employment laws
- When required, get criminal background checks for their employees
- Provide you and your SDP FMS vendor an invoice for the services they provided to you



# Co-Employer and Sole Employer Costs

When you hire employees, the employee costs required by state and federal law are paid out of your individual budget. **These costs are called employer burden.**

These costs include:

- Worker's compensation insurance
- Paid sick leave
- Unemployment insurance
- Required payroll taxes

In addition, you may choose to provide your employees with optional benefits such as vacation or health insurance. These will also be paid out of your individual budget.

# Summary of FMS Models

Tasks	Bill Payer	Co-Employer	Sole Employer
Pays for services and supports in your spending plan	SDP FMS vendor	SDP FMS vendor	SDP FMS Vendor
Who is the employer?	Service Provider	You and SDP FMS vendor	You
<b>Supervision and Timesheet approval</b>			
Schedules your employee	N/A	You	You
Approves timesheets	N/A	You	You
<b>Manages Budget</b>			
Tracks how funds are spent	SDP FMS vendor and You	SDP FMS vendor and You	SDP FMS vendor and You
Provides monthly individual budget statement to you and your service coordinator	SDP FMS vendor	SDP FMS vendor	SDP FMS vendor

# Getting Ready

The image features a light blue rectangular background on a white page. In the top right corner, there is a dark blue horizontal bar. In the bottom left corner, there is another dark blue horizontal bar. Two orange circles are positioned at the top right and bottom left corners of the light blue area, appearing to be at the corners of a square. The text "Getting Ready" is centered on the left side of the light blue area.

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main content is centered on a white background.

# Starting in the SDP

You, your regional center, and your SDP FMS vendor agree on a start date.

Your traditional regional center services stop the day before your SDP start date.

On your SDP start date, you begin using services and supports in your spending plan.

Your SDP FMS vendor pays for the services and supports.

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the light blue background. The main title 'Abuse Awareness' is written in a bold, dark blue font.

# Abuse Awareness

Individuals with developmental disabilities have the right to be free from abuse. It is important to learn about abuse and what to do if it happens to you.

Different types of abuse include:

- Physical
- Sexual
- Financial
- Neglect
- Emotional

The slide features a decorative vertical bar on the left side, consisting of a light blue gradient background with a solid dark blue horizontal bar at the bottom. Two large orange circles are positioned vertically on the left side of the slide.

# Reporting Abuse

If you think abuse is happening to you or someone you know, report it to:

- Your service coordinator
- Your SDP FMS vendor
- Adult or child protective services
- Local law enforcement



# Ongoing Responsibilities

You and your service coordinator continue to work to:

- Develop and review your person-centered IPP goals and decide the services and supports you need to meet them
  - Discuss if your circumstances, needs or resources changed
- Update your IPP, individual budget, and spending plan if needed
- Plan your next year's SDP services
- Discuss questions and concerns

The slide features a decorative header on the left side consisting of two orange circles stacked vertically, with a light blue vertical bar extending downwards from the top circle. A dark blue horizontal bar runs across the bottom of the slide.

# Knowledge Check

Question:

Once you start SDP, do you still need to talk to your service coordinator?

- A. Yes, but only when you need something.
- B. Yes, you need to keep working with your service coordinator.
- C. No, you can just work with your independent facilitator.



# Knowledge Check

Answer:

B. Yes, you need to keep working with your service coordinator.

You continue to work collaboratively with your service coordinator and IPP team in the SDP. They help develop and update your IPP, your individual budget and spending plan, and check-in to see if your services are working for you.

The slide features a decorative vertical bar on the left side, consisting of a light blue background with a darker blue horizontal bar at the bottom. Two orange circles are positioned vertically on the left side of the slide.

# How Do I Get Help Transitioning into the SDP?

Individuals that can help you with your SDP transition include:

- Your **natural supports** – voluntary help you get from family, friends, neighbors, and others in the community
- **Your service coordinator** and other regional center staff
- **SDP Transition Supports**, paid for by your regional center include:
  - Person-Centered Plan
  - General Self-Directed Supports
  - FMS Transition Supports



# Resources & Next Steps





# Resources and Contacts

## Questions about SDP Orientation Materials or Certificates?

Contact SCDD at [sdporientation@scdd.ca.gov](mailto:sdporientation@scdd.ca.gov)

Website: <https://scdd.ca.gov/sdp-orientation/>

## Questions about the SDP?

Contact the Department's SDP Branch at [SDP@dds.ca.gov](mailto:SDP@dds.ca.gov)

Website: <https://www.dds.ca.gov/initiatives/sdp/>

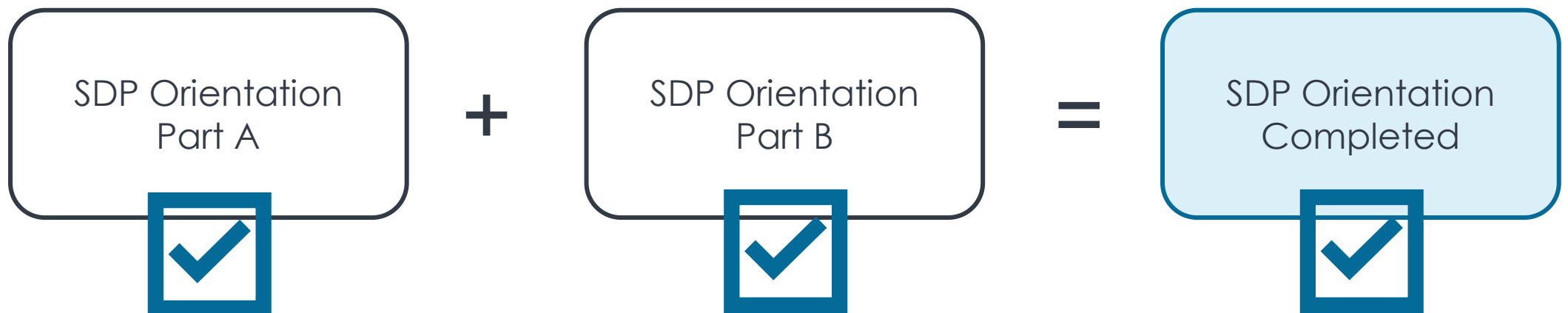
**Additional Resources** can be found at: <https://scdd.ca.gov/sdp-orientation/>

# After Today

Contact your service coordinator and send them a copy of your Part A **and** Part B certificates.

Tell your service coordinator if you want to start your SDP journey.

- If you want, ask them for more information on SDP Transition Supports.



# Certificate of Completion

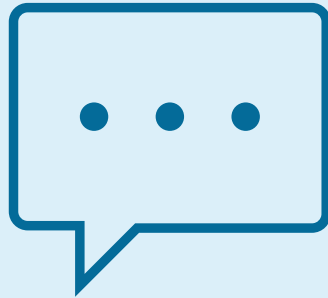
Complete the Certificate Survey. The link is provided in the chat.

- Your first and last name
- Individual's first and last name
- Individual's UCI number
- Individual's regional center





**Questions?**



**CONGRATULATIONS!**

**You have completed the SDP Orientation - Part B**