



Self Determination: Let's Learn Together!

The Budget: Part 2

Presented to the ELARC Self Determination
Local Advisory Committee
April 5, 2016

Elizabeth Harrell, ELARC Information and Training Supervisor

Today, we will leave with an understanding of

- The points from individual budget process presentation from our February 2 meeting
- The role of the law and the Medicaid Waiver application review process as it relates to the individual budget
- The current proposed service categories in the Self Determination program
- How money within the individual budget can be moved within and between service categories
- What happens if needs change during a budget year



A reminder from last time...

- Individual Budget
 - Determined based on the amount of funds spent on regional center funded services for you/family member for the last 12 months
 - Method for new clients
 - Unmet needs
- Role of the Person Centered Planning Process
- Fair Hearing Rights

**Just a
reminder...**



Who's setting these rules about the budget?

- Two places
 - The law
 - The “waiver application”
- Per law, the State of California (DDS) must obtain federal funding
- DDS submitted waiver application
 - Public Review Process
 - Stakeholder Group
 - CMS reviews and approves
- Current status

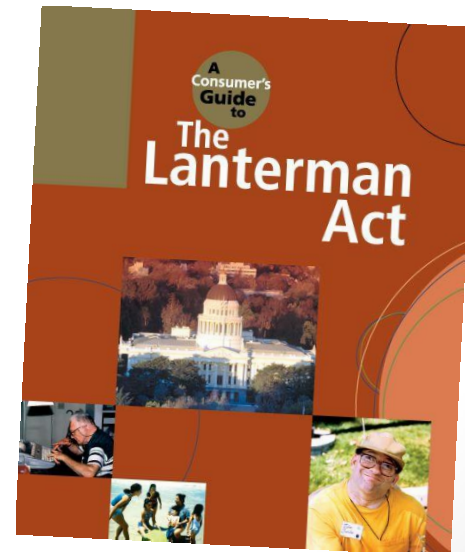


Service Categories

- **Source: Waiver Application**
- Status: Review
- View the Waiver Application at <http://www.dds.ca.gov/SDP/docs/sdpWaiverApplication10-2015.pdf>
 - In Depth Descriptions start on Page 41
 - CMS has questions
- View a list of all **33** proposed services (handout) at http://www.dds.ca.gov/SDP/docs/ProposedServices_SDPApplication.pdf

How to move money

- **Source: The Law**
- *WIC 4685.8 (n){3}* The individual budget shall be assigned to uniform budget categories developed by the department in consultation with stakeholders and distributed according to the timing of the anticipated expenditures in the IPP and in a manner that ensures that the participant has the financial resources to implement his or her IPP throughout the year.



How to move money: The Law

- *WIC 4685.8(o)* Annually, participants may transfer up to 10 percent of the funds originally distributed to any budget category set forth in paragraph (3) of subdivision (n) to another budget category or categories. Transfers in excess of 10 percent of the original amount allocated to any budget category may be made upon the approval of the regional center or the participant's IPP team.



Quick Quiz

Service	Budget Amount
Housing Access Supports	5,000.00
Dental Services	2,000.00
Transportation	3,000.00
TOTAL	10,000.00

Yvonne wants to move \$100 from her transportation budget amount to her dental services. Does she need approval?



No. \$100 is less than 10% of \$3,000.00. It would need to be over \$300.00 to require approval.

Changes to the Budget

- **Source: The Law**
- *WIC 4865.8 (n)(iii) (2)* The amount of the individual budget shall be available to the participant each year for the purchase of program services and supports. An individual budget shall be calculated no more than once in a 12-month period, unless revised to reflect a change in circumstances, needs, or resources of the participant using the process specified in clause (ii) of subparagraph (A) of paragraph (1). *(original determination methodology)*



Questions?

