

MY INDIVIDUAL BUDGET

for the Self-Determination Program

Video Companion Worksheet

The individual budget is the amount of money a Self-Determination Program participant has available to purchase needed services and supports for one year (12 months).

Step 1: The Past 12 Months

The starting point for your individual budget is the amount that was spent on your services in the past 12 months. This amount can be found on a document usually called an expenditure report, which you request from your service coordinator. The services on your expenditure report will be listed by their service code. Prior to completing this worksheet, be sure to review your report with your service coordinator so that they can explain what each service code means for you.

Instructions: Review your expenditure report. List all of the services and service codes that appear on your report. Then, find the total cost of these services listed on your report.

Service code	Name of service and/or provider	Did this service meet your needs? Why/why not?
Example: 862	In-home respite	Yes, this service met my needs this year

The total cost of these services is listed on your expenditure report and is the starting amount for your individual budget.

The starting amount for my individual budget is: \$_____.

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Step 2: Unmet Needs

Unmet needs are needs listed in your prior IPP that were partially or entirely unmet in the past 12 months. This includes services listed on your expenditure report that you only received in part, and services that do not appear on your expenditure report because you did not receive them even though you needed them.

The amount that the regional center would have spent to address these needs in the traditional system should be added to your budget amount.

Instructions: Review the services that appear on your expenditure report from the list on page 1. Are there any services that you only received for some of the past 12 months? Are there any services that you only used a portion of the amount you really needed? If so, why?

Service code	Name of service and/or provider	Reason the need was unmet
Example: S20	Independent Living Program	I waited 6 months for the agency to provide staff.

Instructions: List the needs that were mentioned in your prior IPP, but for which you received zero services in the past 12 months. This could be because no services were offered to meet your need, or because you were unable to use the services that were offered.

Describe the service/need	Reason the need was unmet
Example: social skills	I could not find a social skills program in my area.

Step 3: New Needs

This term refers to both new and newly identified needs. New needs are typically the result of changes in your life. Newly identified needs are ones that existed previously but were not mentioned or addressed in your IPP. New and newly identified needs may be discovered through person-centered planning.

The amount that the regional center would have spent to address these needs in the traditional system should be added to your budget amount.

Instructions: List the new services or needs that you would like to include in your individual budget. Remember, your budget can only include services that exist in the traditional system.

Describe the service/need	Describe the reason for the new need
Example: community-based day program	I graduated from high school and need help accessing the community
Example: respite	I did not know I qualified for this service, and no one offered it to me

Step 4: Non-Continuing Services

Non-continuing services refer to services that are not expected to continue. This can include some one-time expenses, services that you no longer need, or services that are ending because they were replaced by a different service that will better meet your needs.

The cost of these services will be removed from your budget amount.

Instructions: Review the services that appear on your expenditure report from the list on page 1. Are there any services that you no longer need? This can include services that already ended or that will end in the coming year.

Service code	Name of service and/or provider	Reason this service ended or will end
Example: 645	Mobility training	I learned how to take the bus independently and no longer need this service.

Step 5: Agree on Your Individual Budget

Once you have completed this worksheet, have a conversation with your service coordinator about it. The regional center will calculate a budget and explain how they did it. You can agree to it right away or you can ask questions about how they got the numbers in your budget. Make sure to ask all of your questions before agreeing to the proposed budget. Once you are in agreement with the budget, it will be certified.

My certified budget amount is: \$_____.