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GAVIN NEWSOM
GOVERNOR

April 22, 2024

TO: REGIONAL CENTER EXECUTIVE DIRECTORS

SUBJECT: SELF-DETERMINATION PROGRAM: UPDATED BILLING
REQUIREMENTS FOR SERVICES BILLING AT “OTHER RATE”

The purpose of this correspondence is to provide additional guidance to regional centers regarding Financial Management Services (FMS) and updated billing requirements for services, as described in the Department of Developmental Services' (Department) [December 26, 2023 directive](#). For Self-Determination Program (SDP) Providers billing at an other than hourly or daily rate, the below requirements replace the requirements identified in the previous directive. This guidance is issued pursuant to Welfare and Institutions Code section 4685.8(p)(2), which authorizes the Department to issue program directives or similar instructions until regulations are adopted.

This directive does not apply to SDP Providers billing at an hourly or daily rate. These billing requirements do not apply to local businesses and community resources or regional center vendors providing services in accordance with their program design, as defined in the December 26, 2023 directive, and as indicated in Enclosure A.

SDP participants and SDP Providers may agree to services that are not billed hourly or daily. The cost of the services may not be more than a monthly rate. Invoices submitted by an SDP Provider shall include, at minimum, the following supporting information:

- Rate charged by the SDP Provider;
- SDP [Service Code](#);
- Description of specific services/tasks provided;
- The amount of time spent on each service/task provided by the SDP provider specific to the SDP participant for the period of the invoice;
- Date services/tasks were provided;
- A statement that all services specified in the invoice have been provided to the participant.

Additionally, the SDP participant and SDP Provider shall develop a service agreement. This service agreement shall include, at minimum, the following information and be updated annually:

- Participant's information;
- Service provider contact information;
- Start date and end date, if applicable, of service agreement;

Regional Center Executive Directors

April 22, 2024

Page two

- Description of the actual services to be provided and corresponding SDP service codes;
- Frequency of services;
- Rate/unit of services;
- Responsibilities of participant and provider;
- Termination of services policy;
- Signature of participant and provider; and,
- A statement attesting that all payment provided for services in this agreement will be accepted as payment in full.

The completed service agreement, and any changes to the agreement, shall be submitted to the SDP participant's FMS provider for verification that the above elements are included. If an FMS identifies services in the agreement that are not in line with allowable services in SDP, the FMS shall notify the regional center and a planning team meeting shall be scheduled.

SDP Providers billing at an other than hourly or daily rate shall invoice in compliance with the updated billing requirements identified in this directive for services provided after June 30, 2024.

If participants and/or families have questions regarding this correspondence, they should contact their regional center. Questions from regional centers should be directed to sdp@dds.ca.gov.

Sincerely,

Original Signed by:

BRIAN WINFIELD
Chief Deputy Director

Enclosure

cc: Regional Center Administrators
Regional Center Directors of Consumer Services
Regional Center Community Services Directors
Association of Regional Center Agencies
State Council on Developmental Disabilities
Nancy Bargmann, Department of Developmental Services
Brian Winfield, Department of Developmental Services
Carla Castañeda, Department of Developmental Services
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