Participant-directed services: a checklist

Take this sheet to your service coordinator or your planning meeting, and write on it. For a class or camp, see page 2 too.

Before you ask

- ☐ The service I want to direct myself: _____
- ☐ The person or program I have in mind: _____

  This way of getting a service does not add services or hours. If you need a service or more hours, ask for that too. You can ask for both at once.

When you ask

- ☐ I told my service coordinator which service I want to direct myself, and that I want to use participant-directed services.
- ☐ I put it in writing so there is a record. Date: _____
- ☐ I asked for a planning meeting (IPP meeting), if I need one.
  Date I asked: _____

  The regional center must hold the meeting within 30 days after you ask. It must hold it within 7 days if that is needed for your health and safety or to keep you in your home.

Words you can use if you want to hire a worker.
Change "respite" to the service you mean.

> "I would like to get my respite hours through participant-directed services. I have someone in mind to hire. Please tell me which financial management service I would use and what the next steps are."

Questions to ask

- ☐ Which financial management service (FMS) would I use? _____
- ☐ Which forms do I fill out with the regional center? Can I have them now?
- ☐ When does the service start? Date: _____

If you hire a worker:

- ☐ What would I be responsible for? _____
- ☐ Who is the employer: me, or the FMS with me? _____

DAN can help you write your request, read a notice, and get ready for your meeting.
app.sdta-np.com

The whole guide: **choices.sdta-np.com/participant-directed**
"Your life. Your plan. Your choice." comes to you from the Self-Determination Institute and the Self-Determination Tech Alliance, two nonprofits. Questions: support@sdta-np.com

Getting set up, if you hire a worker

- ☐ My own forms with the regional center are done.
- ☐ My worker sent their paperwork to the financial management service (FMS).
- ☐ My worker has the FMS's approval. They cannot start or be paid until the FMS has approved them.
- ☐ I know how to approve my worker's hours, and when timesheets are due.

For a class, camp or activity

- ☐ Program: _____ Cost: _____ Dates: _____
- ☐ I asked the program if it will take payment from a company that pays for the regional center.
- ☐ I asked my service coordinator before I signed up or paid. I said I want it paid through a financial management service.

  Plan ahead. Several regional centers say to ask about four to six weeks before the start date.

If the answer is no

- ☐ I asked for the decision and the reason in writing.
- ☐ I asked what would need to change for the answer to be yes.
- ☐ The day I was told: _____

  You have 60 days from that day to appeal. If a notice says a service you have now will end or change, there is a shorter deadline. Appeal within 30 days of getting the notice, and no later than the date of the change. In most cases that keeps the service going during the appeal.

OCRA. Free help from Disability Rights California when you and your regional center disagree. Call 1-800-390-7032.

Names and numbers

Service coordinator: _____ Phone: _____

FMS: _____ Phone: _____

Worker or program: _____ Phone: _____

Participant-directed services are one of three ways to get your services. The other two are traditional services and the Self-Determination Program. The guide:
choices.sdta-np.com/participant-directed
General information, last checked on October 6, 2026. Ask your regional center how it applies to you. From the Self-Determination Institute and the Self-Determination Tech Alliance.