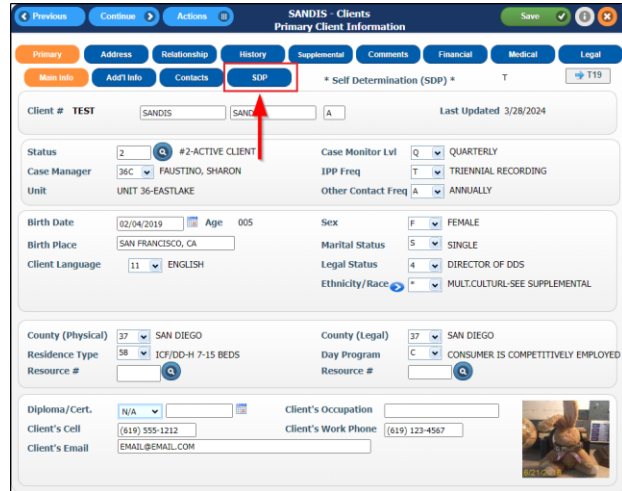


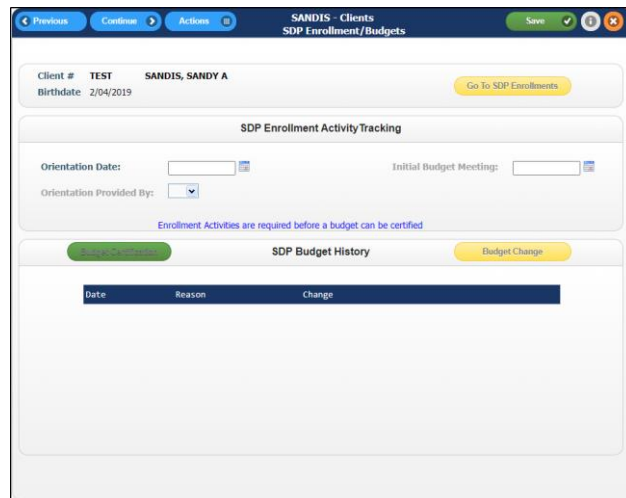
SDP Orientation and Budgets

This program tracks Self-Determination activities, budget certifications, and budget changes.


After selecting a client, navigate to the main Client Information Page and select the **SDP** tab.



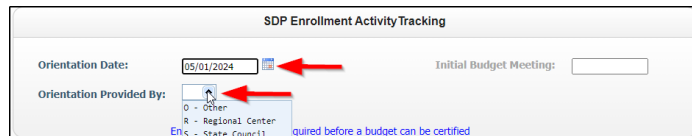
The page will redirect to the **SDP Enrollment/Budgets** page where it will track a client's enrollment activity, budget certifications, and budget changes.




SDP ENROLLMENT ACTIVITY TRACKING


Indicate the Orientation Date by entering it manually or use the  icon to choose the date.

Once the orientation date is entered, the option to indicate who provided the orientation to will become available. Click on the drop down to select the appropriate source.



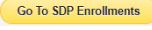
SDP Enrollment Activity Tracking

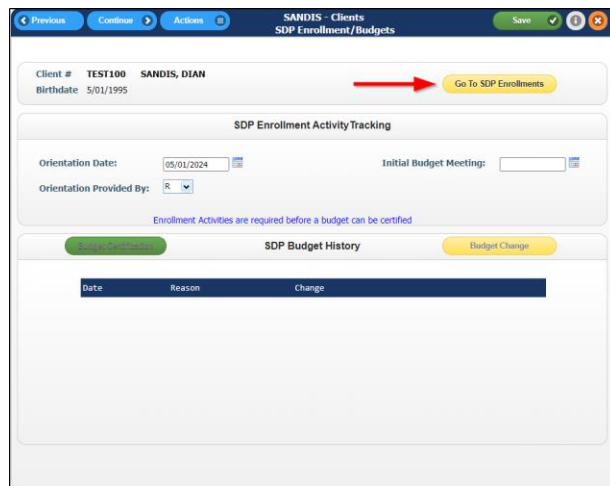
Orientation Date:  Initial Budget Meeting:

Orientation Provided By: 

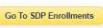
0 - Other
R - Regional Center
ETS - State Council

Enrollment Activities are required before a budget can be certified

When the **Orientation Date** and the **Orientation Provided By** fields have been entered, the  button will become available.





Previous Continue Actions SANDIS - Clients SDP Enrollment/Budgets Save

Client # TEST100 SANDIS, DIAN 



Birthdate 5/01/1995

SDP Enrollment Activity Tracking

Orientation Date:  Initial Budget Meeting:

Orientation Provided By: 

Enrollment Activities are required before a budget can be certified

 SDP Budget History 


Date	Reason	Change
------	--------	--------

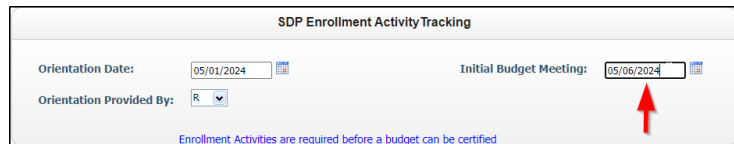
Clicking on [Go To SDP Enrollments](#) will redirect the user to the Service Delivery Tracking page, where a client can be enrolled into SDP.




SDP BUDGET HISTORY

When both the **Orientation Date** and the **Orientation Provided By** fields have been completed, the **Initial Budget Meeting** field becomes available.

Enter the date manually or by using the  icon to choose the date.

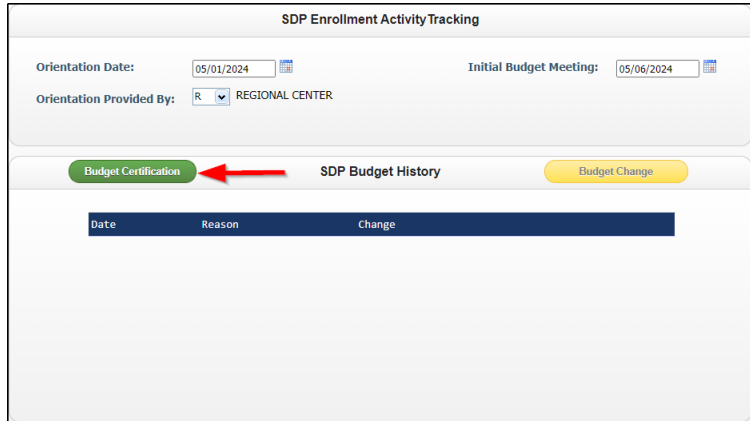


Budget Certification


After the Initial Budget Meeting date has been entered, the  option becomes available.


To create an entry, click on

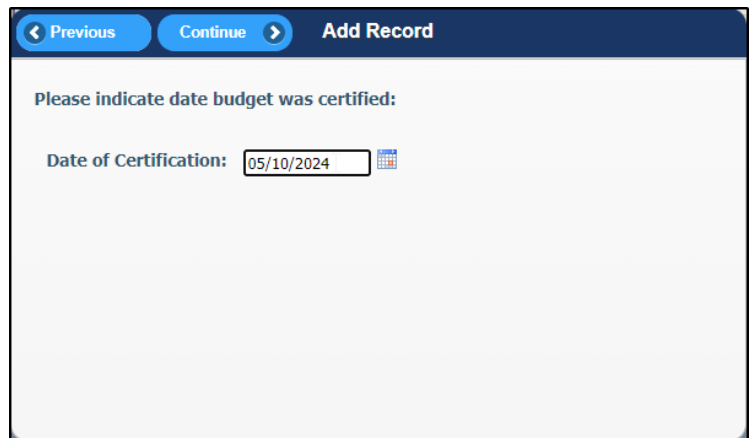
.



Date	Reason	Change
------	--------	--------

A new window will open where a Date of Certification can be entered manually or by using the  to choose the date.

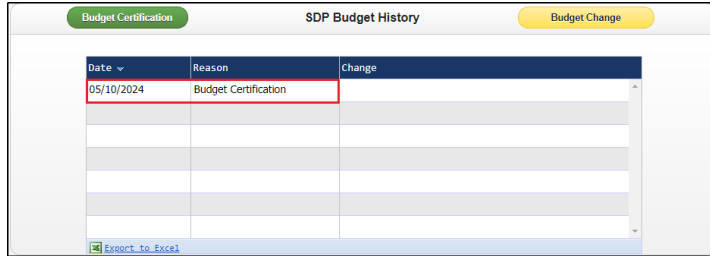
To save the entry, click .



The entry will be added to the history table.

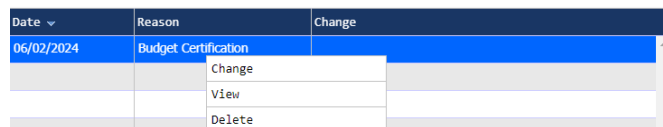
To make a change to the date, right click on the appropriate entry, select 'change', and proceed with entering the correct date.

- An SC can change this information for 30 days and after that, it is read-only;
- A PM can change information for up to 90 days, and after that it is read-only;




Date	Reason	Change
05/10/2024	Budget Certification	

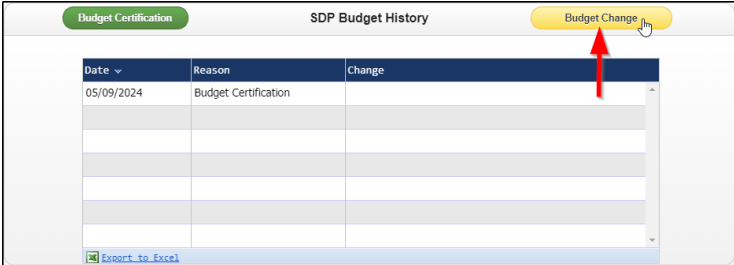
There are also options to 'view' or 'delete' the entry. These options can be accessed by right-clicking on the entry.




Date	Reason	Change
06/02/2024	Budget Certification	


Budget Change

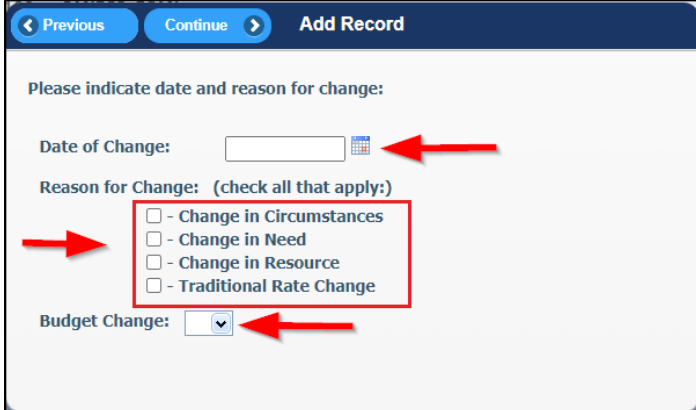
To record a budget change, click on . A new window will open where a **Date of Change** entry can be added.



Date	Reason	Change
05/09/2024	Budget Certification	


Manually enter the Date of Change or use the  to select the date. Select a reason for the change by clicking on the tick box. Multiple options can be chosen, at the same time.

To indicate the type of budget change occurring, hit the drop-down button and choose the appropriate option. Click  to save the entry.



Add Record

Please indicate date and reason for change:

Date of Change: 

Reason for Change: (check all that apply:)

- Change in Circumstances
- Change in Need
- Change in Resource
- Traditional Rate Change

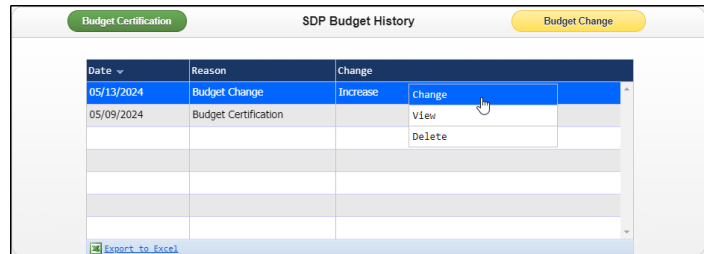
Budget Change:

An entry will be added to the history table.

To make a change to the date, right click on the appropriate entry, select 'change', and proceed with entering the correct date.

- An SC can change this information for 30 days and after that, it is read-only;
- A PM can change information for up to 90 days, and after that it is read-only;

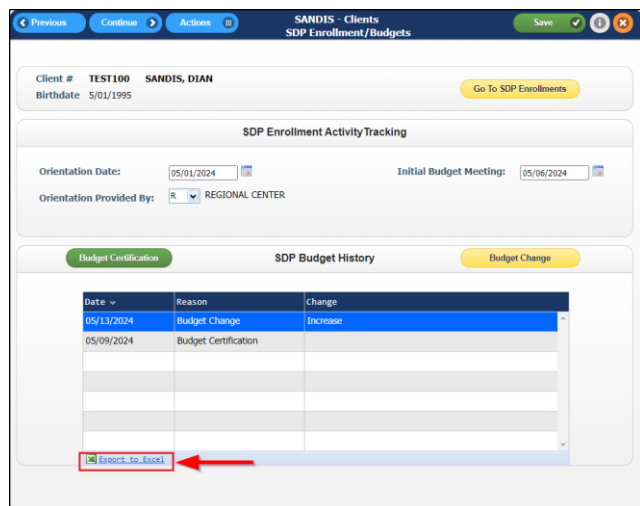
There are also options to 'view' the entry as well as to delete it.



The screenshot shows a table titled "SDP Budget History" with columns: Date, Reason, and Change. The first row has Date: 05/13/2024, Reason: Budget Change, and Change: Increase. The second row has Date: 05/09/2024, Reason: Budget Certification, and Change: (empty). A context menu is open over the "Change" button in the first row, showing options: Change, View, and Delete. There are also buttons for "Budget Certification" and "Budget Change" at the top, and an "Export to Excel" button at the bottom left.

Date	Reason	Change
05/13/2024	Budget Change	Increase
05/09/2024	Budget Certification	

Information within the **SDP Budget History** table can be exported to Excel.



The screenshot shows the "SANDIS - Clients SDP Enrollment/Budgets" page. It includes client information (Client #: TEST100 SANDIS, DIAN; Birthdate: 5/01/1995) and "SDP Enrollment Activity Tracking" (Orientation Date: 05/01/2024, Initial Budget Meeting: 05/06/2024, Orientation Provided By: REGIONAL CENTER). Below this is the "SDP Budget History" table. The "Export to Excel" button at the bottom left is highlighted with a red box and a red arrow.

Date	Reason	Change
05/13/2024	Budget Change	Increase
05/09/2024	Budget Certification	