

How Do Spending Plan Changes Work?

RCEB understands there may be changes needed to projected spending and supports the implementation of the most appropriate supports for individual goals to be met. To facilitate Spending Plan changes, see the steps required Spending for Plan Changes.

#1 Express Need to Make a Spending Plan Change

A change in Spending Plan requires advanced planning, and close communication with your RCEB Case Manager. Notify your Case Manager and FMS you may need to make a change in your Spending Plan as soon as you can. If the change is within 10% the SDP Category, an IPP Addendum will be needed. If the change exceeds 10% of any SDP category, a new IPP will need to be scheduled.



#2 Know Your Spending History

You will need the most current FMS Spending Report. The Spending Report will tell you how much you have spent since starting your SDP Year, and what your balance is at the time of the Spending Plan change. Since FMS reports are sent monthly, spending plan changes may begin at the beginning of the next month. Send your Case Manager a copy of the FMS Spending Report.



#3 Document the Spending Plan Change

You will need to submit a new Spending Plan, reflecting the balance available in your SDP Year. It is advised the new Spending Plan is submitted by the 15th of the month *prior* to when the change is needed. It is recommended changes are initiated at least 6 weeks in advance.



#4 Confirm the Spending Plan Change

A new SDP Worksheet will have to be completed by your Case Manager and SDP Specialist to confirm the Purchase of Service Orders. This Revision SDP Worksheet will need your signature.



#4 Your Spending Plan Change in the System

When you have signed the IPP Addendum (or IPP), submitted the most current FMS Monthly report, new Spending Plan, and signed Revised SDP Worksheet, your Case Manager will enter any new POS needed to reflect your updated spending need. Changes will be made to existing POS, when needed, to reflect your updated spending need. Changes will route the same journey as original POS entered when you initially submitted your Spending plan for SDP Transition. Please allow time for: cancellation of any needed POS, entering of new POS needed, review of documentation submitted by Supervisor, Director, and RCEB Accounting. This process may take up to 3 weeks.

