



Exception to CDCS Budget Methodology

Lead agency case manager may complete this checklist to determine eligibility for the exception.

County: _____

Participant's Name: _____ Date: _____

Participant's Date of Birth: _____ Waiver Type: _____ PMI#: _____

Criteria	Meets criteria	Does not meet criteria	Notes
Participant is 21 years old	<input type="checkbox"/>	<input type="checkbox"/>	
Participant graduated from high school/left public education during 2013	<input type="checkbox"/>	<input type="checkbox"/>	Graduation Date: _____
The participant has been receiving CDCS services.	<input type="checkbox"/>	<input type="checkbox"/>	
The participant demonstrates they: 1. Have to leave CDCS and 2. Use other waiver services because the CDCS budget limits do not meet their need for day or employment supports	<input type="checkbox"/>	<input type="checkbox"/>	

1. Participant meets ALL exception criteria: Yes No
2. Date participant met criteria (effective date): _____
3. Discussed CDCS exception process and timeline with participant/legal representative:
 Yes No Date discussed: _____
4. Documented this information in the participant's case file: Yes No

If participants meet the exception criteria, increase their budget by 20%:

1. Multiply the current budget amount by 1.2
2. Increase their budget only after participants meet all of the exception criteria.
3. Pro-rate budgets to be consistent with the current service agreement period.

Current Budget Amount: \$ _____ Adjusted Budget Amount: \$ _____

Comments:

Print, sign and date

Case Manager's name: _____ Phone number: _____

Case Manager's signature: _____ Date: _____

For individuals determined eligible during 2013, the exception process continues through Dec. 31, 2014
File in participant's case file.