

Regional Center Intake — Document Checklist for California Families

What to bring, what to ask, and what to expect from your first Regional Center meeting.

When you call your Regional Center for intake, California law requires them to offer an initial appointment within 15 working days. The better your documentation, the faster the evaluation moves and the clearer the eligibility decision will be. This checklist is what to bring — and what to ask — so you walk out knowing next steps.

How the Intake Process Works

1) You call intake. 2) Initial appointment is scheduled (within 15 working days). 3) Evaluations are scheduled and completed. 4) Eligibility team meets and issues a written decision. 5) If eligible, you move into IPP (Individual Program Plan) development within 60 days. If ineligible, you have 90 days to appeal.

Documents to Gather Before Your Intake Call

Identity & Insurance

- Child's original birth certificate (or certified copy)
- Child's Social Security card
- Private insurance card (front and back)
- Medi-Cal card or BIC (if enrolled)
- Parent/guardian government-issued photo ID
- Proof of California residency (utility bill, lease, or similar)

Medical Records

- Pediatrician summary letter and most recent well-child visit notes
- Specialist reports (neurology, developmental pediatrics, genetics, cardiology, etc.)
- Hospital admission/discharge summaries from the last 2 years
- Genetic testing results (microarray, whole-exome, targeted panels)
- MRI, EEG, or other imaging reports
- Newborn screening results (if available)

Developmental Evaluations

- Psychological or neuropsychological evaluation
- Developmental assessment (e.g., Bayley, Mullen, ADOS, ADI-R)
- Occupational therapy (OT) evaluation
- Speech-language pathology evaluation
- Physical therapy (PT) evaluation
- ABA assessment or behavior plan (if applicable)

School Records (If Your Child Is in School)

- Most recent IEP, IFSP, or 504 Plan

- District special education assessment report
- Recent report cards and attendance records
- Teacher narrative or behavioral observations (if available)

Medication & Diagnosis Records

- Current medications with dosage, prescriber, and start date
- Any prior diagnoses with dates and source documents
- List of past medications and why they were stopped

Questions the Intake Coordinator Will Likely Ask

- Your child's full legal name, date of birth, and SSN
- Pregnancy, birth, and early developmental history (milestones)
- Current concerns in your own words — be specific and give examples
- Who lives in the home and their relationship to the child
- All doctors, therapists, and specialists currently involved
- Whether your child has private insurance and/or Medi-Cal
- Whether your child has an IEP, IFSP, or 504 Plan
- School placement and any behavioral incidents reported

Questions YOU Should Ask the Intake Coordinator

Advocacy starts on the first call. Write down their answers in your binder.

- What is the expected timeline from intake to eligibility decision?
- Which evaluators will be assessing my child, and where?
- Are evaluations done in my child's primary language?
- What documentation are you hoping to see — and what gaps do you see now?
- Who is my assigned service coordinator, and what is their email and phone?
- If found eligible, how soon will the IPP meeting be scheduled?
- If found ineligible, how do I request a written copy of the decision and appeal?

Eligibility Categories (Age 3+)

A child age 3 or older must have a condition that substantially handicaps them and falls into one of these five categories:

- Intellectual Disability (ID)
- Autism Spectrum Disorder
- Cerebral Palsy
- Epilepsy
- 5th Category: a condition closely related to ID or requiring treatment similar to that required by persons with ID

Under age 3: eligibility is through Early Start based on developmental delay or established risk — the five-category rule does not apply until age 3.

If Your Child Is Found Ineligible — Your Appeal Rights

- You have **90 days** from the eligibility decision to file a written appeal (fair hearing request).
- Ask for the written Notice of Proposed Action — it must include the reasons and the appeal form.
- You can request an informal meeting first to review the decision with the RC director.
- Disability Rights California (1-800-776-5746) offers free help with Regional Center appeals.
- Gather any additional evaluations or records that address the specific reason for denial.

If Your Child Is Found Eligible — What Happens Next

- You will be assigned a service coordinator (SC) — this is your main point of contact.
- An IPP (Individual Program Plan) meeting is scheduled within 60 days of eligibility.
- You and your SC will identify goals, services, and the people who will provide them.
- Services are reviewed annually (or every 3 years for some consumers) and whenever needs change.
- Ask about Self-Determination Program (SDP) orientation once your case is open.

Tips: How to Advocate During the Assessment

- Bring your child on a day when their challenges are typical — not after a nap and a favorite meal.
- Describe the hard days, not the best days. Evaluators need to see the real range.
- Provide concrete examples: 'He eloped from the grocery store three times last month,' not 'He wanders.'
- Write a one-page parent narrative ahead of time and hand it in — it becomes part of the record.
- Ask for every report in writing. If a report is missing, the eligibility team may default to denial.
- Never leave a meeting without the next step written down and a date next to it.