

IPP MEETING PREPARATION CHECKLIST

Lanterman Act §4646–4648

BEFORE THE MEETING

Gather Documents

- ☐ Copy of current/most recent IPP
- ☐ Previous IPP meeting notes or summaries
- ☐ Any denial letters or notices from RC to be discussed, if applicable
- ☐ School records, IEP, or transition plan, if applicable
- ☐ Medical or diagnostic reports supporting service needs, if applicable
- ☐ Clinician or therapist letters endorsing specific services, if applicable
- ☐ Employment or day program records, if applicable

Prepare Your Agenda

- ☐ Write down your top 3–5 goals for the meeting
- ☐ List specific services you are requesting (with vendor names if known)
- ☐ Identify any services that are expiring or need renewal
- ☐ Note any concerns, denials, or unresolved issues to address
- ☐ Prepare written talking points or a one-page summary

Know Your Rights

- ☐ WIC §4646: Right to IPP meeting at any time upon request
- ☐ WIC §4646.5: Meeting must reflect consumer's needs, not just available services
- ☐ WIC §4648: Services must be provided in the least restrictive environment
- ☐ Right to bring an advocate, attorney, or support person
- ☐ Right to request an interpreter at no cost

Logistics

- ☐ Confirm meeting date, time, and location (or teleconference link)
- ☐ Arrange transportation or childcare if needed
- ☐ Notify support person or advocate of meeting details
- ☐ Send any supporting documents to service coordinator in advance

AT THE MEETING

During the Meeting

☐	Take notes or ask permission to record the meeting
☐	Ask for clarification on anything you do not understand
☐	Request that all agreed services be written into the IPP before signing
☐	Ask for a copy of any forms or documents presented
☐	Request timelines for service authorization and vendor referrals

AFTER THE MEETING

Follow Up

☐	Do NOT sign if the IPP does not reflect what was agreed upon
☐	Review signed IPP and confirm all agreed services are documented
☐	Send a follow-up email summarizing what was discussed and agreed
☐	File a copy of the signed IPP in a safe location
☐	Follow up if authorizations or vendor referrals are not received within 30 days
☐	If any services were denied, request a written denial and consider filing for a Fair Hearing (WIC §4710)

★ Advocacy Tips

- Always follow up verbal commitments with a written email confirming what was agreed.
- If RC denies a service, ask for the denial in writing — you have 30 days to request a Fair Hearing.
- Cite the Lanterman Act by section number when advocating; it signals you know your rights.
- You are not required to sign the IPP at the meeting. You can request time to review it.
- Bring a support person — a second set of ears can be invaluable.