

## **LETTER OF INTENT\***

### **“Care and Support Plan”**

A Letter of Intent is a document written by family or guardian which describes the person’s history, current status, and what you hope for them in the future. In this way you can “speak out” on their behalf, providing insight and knowledge about their best possible care.

**FAMILY HISTORY:** where and when family was born and raised, heritage, details around their birth, connections with other family members, account of your favorite memories.

**GENERAL OVERVIEW:** brief summary of family member’s life to date, general thoughts and hopes about the person’s future.

**DAILY SCHEDULE:** levels of function, daily routines, schedules for outside activities, transportation needs, events they love and dislike, abilities in self-care, family life that builds self-esteem, sources of daily frustrations, behavior management around self-care.

**FOOD:** diet restrictions, preferences, eating problems, food dislikes, amounts of food portions, food consistencies, allergies, favorite restaurants.

**MEDICAL CARE:** diagnoses; disabilities; medical history; allergies; physicians/psychologists: contact info, best office person to reach, frequency of appts; medications prescribed by each MD and daily schedule; pharmacy contact for each medication.

**COMMUNITY INTEGRATION:** desired community activities, places or activities to be avoided, friends and contact #s, respite resources, support group times/location/leader.

**BENEFITS RECEIVED:** provide all data regarding Health Insurance, Medicaid, Medicare, Trusts, Waivers; outline any reporting requirements.

**LEGAL:** list family/special needs/estate attorney, provide copies of wills/trusts/POA/guardianship/conservatorship.

EMPLOYMENT: types of work or volunteer environments appropriate for vocational or volunteer activities.

RESIDENTIAL ENVIRONMENT: describe what type of environment you would prefer for the person to reside in after you stop being the primary care contact.

SOCIAL ENVIRONMENT: list friends/favorite family members name and best contact information, social activities the person enjoys, favorite vacation locations, safety parameters for travel.

RELIGIOUS ENVIRONMENT: religious preferences, list name and contact information for church, significant church activities enjoyed by the person.

BEHAVIOR MANAGEMENT: describe behavior management plan, outline strategies which have not worked in the past, list professional responsible for behavior plan of care development.

FINAL ARRANGEMENTS: list desires for the person's funeral/cremation, monument and cemetery; identify the clergy desired for religious services.

This document should be signed and dated. It should be reviewed annually and updated accordingly. The document should be reviewed annually with the individuals which would be providing daily care and oversight of the plan of care.

*A letter of intent (LOI) summarizes, in a single document, important details that will enable guardians and trustees to care for an individual with special needs when parents are no longer able to do so. It should include medical and education history, the individual's likes, dislikes and habits, and aspirations concerning the loved one's future, including living arrangements, career and lifestyle. The LOI is meant to be a roadmap for caregivers and to minimize disruption during an emotional time of transition.*

\*Courtesy [Special Needs Alliance](#)