

(SAMPLE) LETTER OF INTENT FOR JANE DOE

TO WHOM IT MAY CONCERN:

The following information is to be used by relatives, guardians, and others when we are no longer able to actively advocate for, and on behalf of, our daughter, Jane Doe.

Parent _____
Date

Parent _____
Date

=====

POINTS OF CONTACT, Phone/Email

Advocate: By Their Side, 443-239-1234/info@bytheirside.org
Sibling:
Trustees:
Guardian:
Attorney:
Financial Advisor:
Rep Payee for Social Security:
Resource Coordination Agency/Coordinator:
Day Program:
Residential:

RESIDENTIAL CARE

Jane receives 24 hours of supervision in her residence with two hours unsupervised a day. She lives with two other women in a home managed by ABC Residential Services. In addition to monitoring services and assessing Jane’s care and satisfaction with services, her Advocate should verify that Jane’s low cholesterol diet is followed, she is provided sturdy shoes as recommended by her podiatrist as she is prone to falling, and that preferred leisure activities are available. Clothing should be periodically inventoried with Jane and her residential staff to assure an adequate supply of appropriate, well fitting clothing is available.

The residential provider has agreed to take Jane for haircuts every two months. Jane should not have a permanent because of skin reactions to some products. Her staff helps with cutting Jane’s nails, and her toe nails should be examined periodically to assure this assistance is provided or a podiatry appointment is scheduled. Jane wears sturdy shoes from Van Dyke and Bacon, size 7 E, to assist her stability (they have helped reduce falls). If Jane needs funds to pay

for the shoes or additional clothing, her Trustee should be notified. Staff should also assist Jane in purchasing small gifts on special occasions.

Jane does not communicate verbally but enjoys showing visitors her room. When visiting, advocates should observe Jane in her surroundings and talk with staff and possibly housemates to learn about Jane's activities and needs. Jane sometimes expresses pain through behavior; repeated behavioral episodes may warrant evaluation by her physician.

DAY PROGRAM

Jane attends JKL's vocational program 2 days a week where she works on contracts. Jane currently takes off a week at Christmas to visit home and a week in the summer for a vacation. Trust funds will be available to support an annual vacation. Jane's sister will have Jane visit for Christmas in the future, schedule permitting.

RECREATION

Jane enjoys therapeutic horseback riding once a week for 45-minute sessions. ABC transports Jane for riding classes. Funds will be available through her Trust to continue this activity. She also enjoys going to movies, eating out, going for ice cream, train rides, swimming (with constant supervision), and boat rides. Jane also enjoys fashion magazines, catalogs, 100 piece puzzles, and old TV shows such as those on TV Land.

Jane's Trustee has been requested to fund a Visitor to take Jane out twice a month (lunch, shopping, etc). An annual vacation should be arranged; Jane particularly enjoys going to the beach.

RELIGIOUS

Jane is Methodist and likes to attend church a few times a month. Her residential agency assists her to attend the local Methodist church on occasion and other churches at other times. Jane particularly enjoys Christmas services and pageants, at her church and others. (In the holiday season, Jane also enjoys productions of the Nutcracker.)

MEDICAL CARE

Jane continues to see Dr. Smith, her long time primary care physician. ABC Residential Services arranges for other doctors and a staff person takes Jane to the appointments. Recommendations by her neurologist should be closely monitored due to active seizure history. Her hip was replaced in 1996 and should be evaluated periodically. Jane needs sedation dental care every 6 months which will be paid through her Trust. She receives a Colonoscopy every 5 years.

FINANCIAL

Jane receives Supplemental Security Income (SSI) and Maryland Medical Assistance (MA). Jane's day and residential programs are funded by the Maryland Developmental Disabilities Administration (DDA). Through Medical Assistance, she is enrolled in a DDA Waiver Program, which allows the federal government to pay a portion of her DDA services. A Discretionary Special Needs Trust has been established for additional needs.

MA covers most of Jane's medical expenses. Uncovered services such as sedation dental will be paid for through her Trust. Annual recertification is required to keep Medical Assistance active; forms are sent by DSS each May. It is important that forms are returned on time and that her bank accounts do not accumulate more than \$2000 so that there is not a lapse in MA for medical care or funding of day and residential programs.

Jane has a bank account (#00-00000-00), at XYZ Bank where she has direct deposit of her Social Security check. A Burial Account of \$1500 is also at XYZ Bank, #00-00000-00; current burial plans are for cremation and will be updated after further consideration. The Residential Provider agency maintains a personal spending account for Jane at LMNO Bank, #11-111111-11.

Jane's mother is Representative Payee for Social Security, and provides an annual accounting of income and expenses to Social Security. Receipts are kept, along with all documents pertaining to Jane, in Jane's gray file box located in the file box on the back hall shelf. Upon her mother's death, the residential agency will be Jane's Representative Payee. Presently, \$xxx/mo of Jane's Social Security check is sent for deposit into Jane's personal use fund and \$xxx/mo is provided to the residential agency for Jane's Contribution to Care as required by DDA.

TRUSTEES

A Special Needs Trust has been established for Jane's benefit. The Trustee will conserve and manage Jane's Trust Fund assets, and withdraw from that fund to meet expenses incurred commensurate with the intentions defined by the Trust Fund documents. It is our desire that the Trustees consider the following when making decisions regarding Jane's Trust Fund:

1. Pay for uncovered medical care or medication including sedation dentistry.
2. Hire a Visitor to take Jane out twice a month (shopping, lunch, shows, etc) and pay related expenses for both within reason. An updated list of prospective Visitors is in Jane's home file.
3. Contract with By Their Side to provide Advocacy services as described below.
4. Pay for a supervised vacation to the beach or other vacation desired by Jane. This may include paying for a residential staff person or supervised vacation program to accompany Jane. Provide funds, if needed, for weekend outings or day trips.
5. Pay for other things for Jane as deemed needed for her well being or life enhancement.

BY THEIR SIDE SERVICES

It is our wish that By Their Side (7215 York Rd Suite 352, Baltimore MD 21212, 443-279-1234, info@bytheirside.org) be contracted to provide services four times each year as stipulated below:

1. Attend Jane's annual team meeting. Assure service needs are addressed and assist her team to plan vacation, outings, and other life enrichment activities that Jane would enjoy, communicating required funding to her Trustee as needed.
2. Complete 3 visits per year to either her home or day program.
 - Monitor provision of medical and other services as noted above, that sturdy shoes are provided, that nails are trimmed, and other medical needs as may arise.
 - Inventory clothing periodically and submit recommendations for purchases to the residential coordinator (and Trustee if additional funds are needed.)

- Periodically review Jane's agency financial statement to assure she is assisted to make full use of available State benefits and resources to minimize Trust expenses.
3. If requested by Trustee, assist in developing an estimated annual budget for expenditures from Jane's Trust Fund.
 4. Assist Jane's Trustee in hiring a Visitor to take Jane on outings selected by her twice a month. An updated list of prospective Visitors is in Jane's file. Monitor activities of the Visitor.
 5. Review reports from Jane's Service Coordinator and the service providers.
 6. Send update reports and meeting minutes to the Trustees as needed for determination of any additional advocacy work that will be required.
 7. Provide periodic updates to Jane's sister, who lives out of state. Provide consultation and assist to address concerns she may have with Jane's care.