

CA/PS Synopsis Guide

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This document provides guidance for APD/AAA case managers in completing the synopsis in Oregon ACCESS (OA) after an assessment.

Considerations

Briefly describe the individual's circumstances.

Consider including:

- Age
- Living situation
- Physical and cognitive status
- Changes since last assessment or events leading to assessment
- Interests, people, and things important to the individual
- Summary of the service plan and supports

Reminders

- The synopsis is not required but valuable to the next person assessing the individual.
- Avoid duplicating information from the assessment comments.
- Information affecting eligibility belongs in the assessment comments, not in the synopsis.
- **Do not include HIV/AIDS diagnoses in the synopsis.** Only include medical and mental health diagnoses if relevant.
- Ensure the synopsis does not conflict with assessment comments.
- Be person-centered and objective in the synopsis.

Example

Hansen is 47 years old and lives in an apartment with two roommates and their cat, Jinga. Hansen uses they/them pronouns.

Hansen began services eleven years ago after a bike accident. They have multiple diagnoses, including paraplegia and emphysema. They report a decline in overall health since their last assessment.

Other changes include moving into an accessible apartment and receiving a motorized wheelchair. Hansen reports enjoying the freedom these changes provide, like going to the convenience store to get a soda without needing someone to go along.

Service options discussed: Hansen wishes to continue to receive in-home services. The assessment resulted in a slight decrease in hours. Hansen will speak with their homecare worker (HCW) to adjust their care schedule. Hansen's roommates agree to continue to help as natural support when the HCW is not there.

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