

Goals, Strengths and Preferences Comments

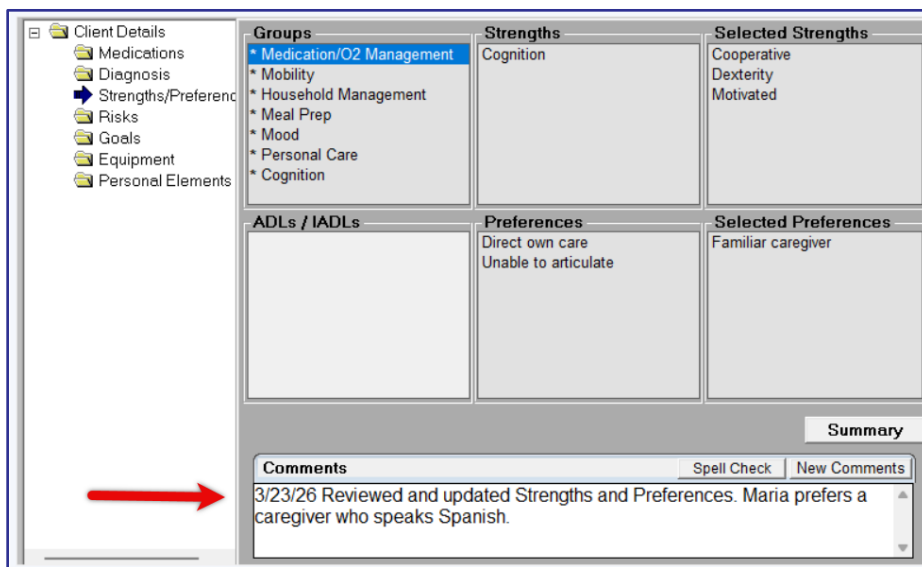
Updated: August 12, 2026

Before approving the service plan in Oregon ACCESS (OA), case managers must confirm the Strengths, Preferences and Goals sections are complete and current. Each section must include a dated comment. The way comments are entered may change after an OA update.

Note: Currently, this guidance does not apply to OPI-M.

Strengths and Preferences

The dated comment confirms the case manager completed or reviewed the individual's strengths and preferences. It should also document any changes, strengths, preferences, or other important information of special importance to the individual.



The screenshot displays the Oregon ACCESS (OA) system interface. On the left is a navigation pane with a tree view containing: Client Details, Medications, Diagnosis, Strengths/Preferences (highlighted with a blue arrow), Risks, Goals, Equipment, and Personal Elements. The main content area is divided into several sections:
 - **Groups**: A list with 'Medication/O2 Management' selected. Below it are items: Mobility, Household Management, Meal Prep, Mood, Personal Care, and Cognition.
 - **Strengths**: A text box containing 'Cognition'.
 - **Selected Strengths**: A list containing 'Cooperative', 'Dexterity', and 'Motivated'.
 - **ADLs / IADLs**: An empty text box.
 - **Preferences**: A text box containing 'Direct own care' and 'Unable to articulate'.
 - **Selected Preferences**: A text box containing 'Familiar caregiver'.
 - **Summary**: A button located at the bottom right of the main content area.
 - **Comments**: A section at the bottom with a 'Comments' label, a 'Spell Check' button, and a 'New Comments' button. A red arrow points to a text box containing the comment: '3/23/26 Reviewed and updated Strengths and Preferences. Maria prefers a caregiver who speaks Spanish.'

Comment examples

- 2/19/26 Completed Strengths and Preferences. Ivan enjoys being active and social, prefers frequent activities, and benefits from reminders. Preferences were reviewed with facility staff at care conference.
- 3/5/26 Completed Strengths and Preferences. Family is very important to Leonora and is highly involved in her care. She prefers to have at least one family member present during assessments and calls to help with communication.
- 3/23/26 Reviewed and updated Strengths and Preferences. Maria prefers a caregiver who speaks Spanish.
- 4/28/26 Reviewed and updated Strengths and Preferences. Jim realized he prefers his caregiver to come later in the morning. Jim asked for assistance in discussing this with his caregiver.
- 6/10/26 Reviewed Strengths and Preferences. No changes. Zlata shared she prefers female caregivers and would like assistance exploring options for her daughter to become her caregiver.

Goals

Goals should be written in the individual's own words in the Goals Detail box. Describe the action(s) taken to support the individual's goal or note when no supports or resources are identified in the Comments box. The comment must reflect how the service plan can be used to support the individual's goal and include a date. **Do not select the New Comments button. Keep previous goal comments and add new comments above them.**

Goals, Strengths and Preferences Comments

Goal	Status	Create Date	End Date
"I miss cooking and want to help pr	Met	11/16/25	06/11/26
I want more opportunities to talk wi	Ongoing	06/12/26	

Goals Detail

Goal: "I want more opportunities to talk with people."

Status: Ongoing

Create Date: 06/12/26 End Date: 00/00/00

Actions

Type: Referral Who acts: Case Manager End Date: 00/00/00

Add Remove

Comments Spell Check New Comments

6/12/26 Discussed community resources, including meal sites and the senior center. Provided information on social isolation programs, including GetSetUp.

Examples

- Goal: I want more opportunities to talk with people.
 - Comment: 6/12/26 Discussed community resources, including meal sites and the senior center. Provided information on social isolation programs, including GetSetUp.
- Goal: I want to be able to manage my own pills.
 - Comment: 6/12/26 Made a referral for LTCCN to support medication management and review.
- Goal: I want to do my own grocery shopping.
 - Comment: 6/12/26 Marta and HCW will coordinate shopping around scooter availability. CM will authorize additional transportation mileage.
- Goal: I want to stop falling.
 - Comment: 6/12/26 Elias and his family will review the home for fall risks and discuss physical therapy with his doctor. CM provided

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information for K Ancillary Services for home modifications and made a referral for an ERS.

- Goal: I want to buy a house.
 - Comment: 6/12/26 Provided information on local housing counseling agencies and financial education resources.
- Goal: I would like to have independence when using the bathroom.
 - Comment: 6/12/26 Currently, Yoni can't transfer without HCWs help. She agrees to follow up with PCP for a transfer pole referral to help meet the goal.
- Goal: I would like to look at the stars at night.
 - Comment: 6/12/26 CM will discuss with Norman's rep payee the possibility of them buying a telescope for Norman's back porch.
- Goal: I am interested in participating in PACE.
 - Comment: 8/12/26. Francis lives outside of a PACE service area and doesn't want to move. No resources or supports identified to meet the goal at this time.

Resources

TUFSS Learning Hub: [Client Details Tutorial](#)

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