

Sticky Note Guide

July 20, 2026

Purpose and appropriate use of Sticky Notes

Sticky Notes are a quick-reference feature in Oregon ACCESS (OA) that allow staff to document brief reminders or alerts that may help with case management (CM), service coordination or safe contact with an individual. Sticky Notes are part of the individual's case record and may be discoverable upon request. Staff must use Sticky Notes only for brief, case-related reference information. Sticky Notes must not replace OA case narration, required documentation, formal notices, service plan updates or other required case actions. Staff must not enter sensitive or restricted information, including domestic violence information, Adult Protective Services (APS) information or HIV/AIDS-related information.

Suggested use for Sticky Notes (but not limited to)

Local office examples:

- PACE Deeming:
 - Date/month reassessment is due
 - Date Buckley Notice should be sent if necessary
- EWE:
 - Data/month reassessment is due
 - Date/month to narrate six-month contact
 - Due date/month of each quarterly direct contact or frequency of direct contact, such as bi-monthly
 - Date Buckley Notice should be sent if necessary

- Taking a blank EWE form to home visit for signature
- ICP:
 - Date of next ICP 6-month budget review
 - EVV compliance check-in reminders with Acumen
- OPI-M:
 - Annual PLAN due date
 - HCW treatment end dates (to be reviewed during the annual PLAN review)
 - The individual's communication frequency preference for contacts (reflected on their PLAN)
 - PMDDT review date (when outside of ONE)
- MED:
 - MED decision and date
- Safety concerns:
 - Dogs on the premises
 - Gun(s) in the house
 - Other family or people who may have a negative impact during visits
 - General safety concerns/observations noticed during a visit
 - The need to have another person with a CM during a home visit
 - Individual challenging behavior(s) that may impact delivery of care by provider or may impact a visit with a CM
- Misc.:
 - Best time to contact individual
 - Name of previous providers for specific helpful information
 - Directions to individual's home
 - Reminders to use side door when front door is not accessible
 - Medical and/or SNAP renewal dates
 - Direct/Indirect reminders (including WCM and risk monitoring) for individuals who are not listed for listed for contacts (PACE, MAGI or NF)

Central Office examples:

- Central Office staff may use the Central Office tab to enter brief notes that help local office staff quickly identify Central Office actions, decisions or follow-up needs/actions including:
 - Due process-related status and service plan limitation reminders
 - Spousal Pay eligibility information, such as eligibility conditions met, approval date, effective date or review date
 - Exception approval details, including rate-specific approvals, effective start and end dates, limited-duration exception timeframes or required follow-up
 - Central Office review reminders or pending action items

Topics Sticky Notes must not be used for

Sticky Notes are part of an individual's record and is discoverable to the individual upon request.

- To replace OA case narration
- Domestic Violence related information
- Adult Protective Services related information
- HIV/AIDS related information

Viewing Sticky Notes

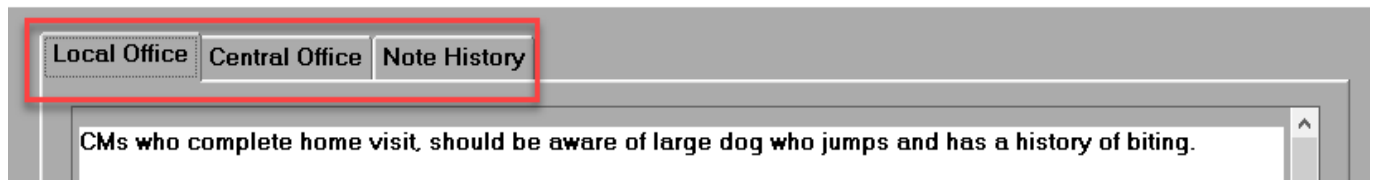
- Click on the Sticky Notes icon in the upper right-hand corner in Oregon ACCESS (OA)



- There are three tabs available in OA.
 - Local Office
 - Central Office

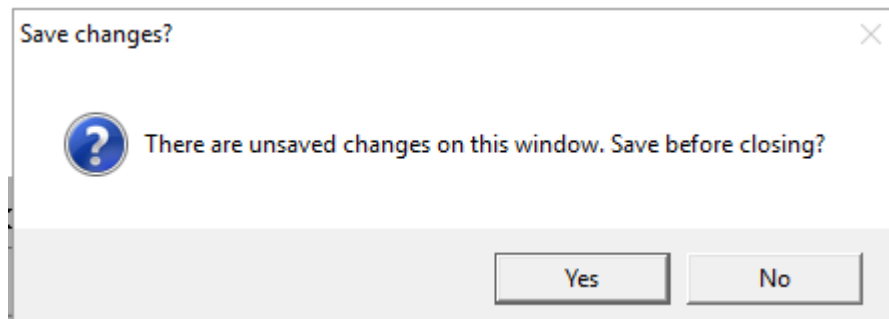
- Only Central Office staff with Tier three rights can create, delete and edit notes on this tab.
- Note History
 - Information displayed on this tab is not editable. If information is found that must be edited or deleted, users must submit a service desk ticket for assistance.
- Staff with rights to read and write in OA are able to view notes on all tabs and are able to create, delete and edit notes on the Local Office tab.
- Staff with read only rights in OA are able to view notes on all tabs but are unable to create and edit notes on all three tabs.

Person Sticky Note for

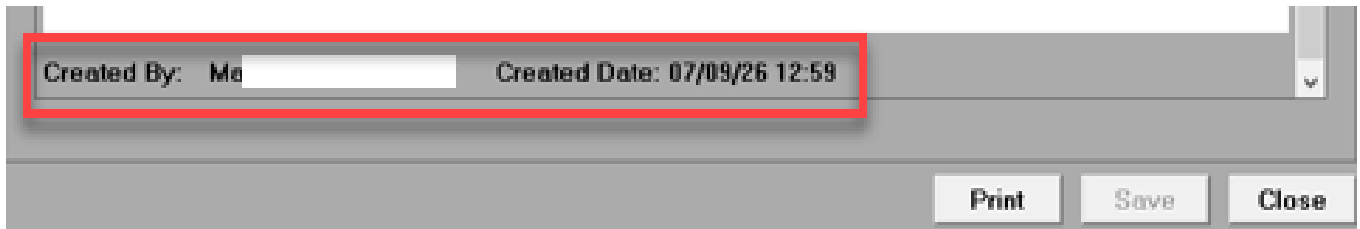


Adding or editing Sticky Notes

- To add a note on a tab, just select the tab and start typing.
- Staff can add, edit or delete existing text.
- Staff must click the 'Save' button at the bottom of the window when done writing or editing the Sticky Notes.
- Staff will receive the following message if they try to leave the Sticky Notes tab without saving.



- The 'Created By' and 'Created Date' information will populate with the staff person's information who last created/edited the tab after selecting save and closing the screen.

A screenshot of a software interface. At the top, there is a header bar. Below it, a red rectangular box highlights two fields: 'Created By: Ma' followed by a text input field, and 'Created Date: 07/09/26 12:59'. Below these fields, there are three buttons: 'Print', 'Save', and 'Close'.

Note History

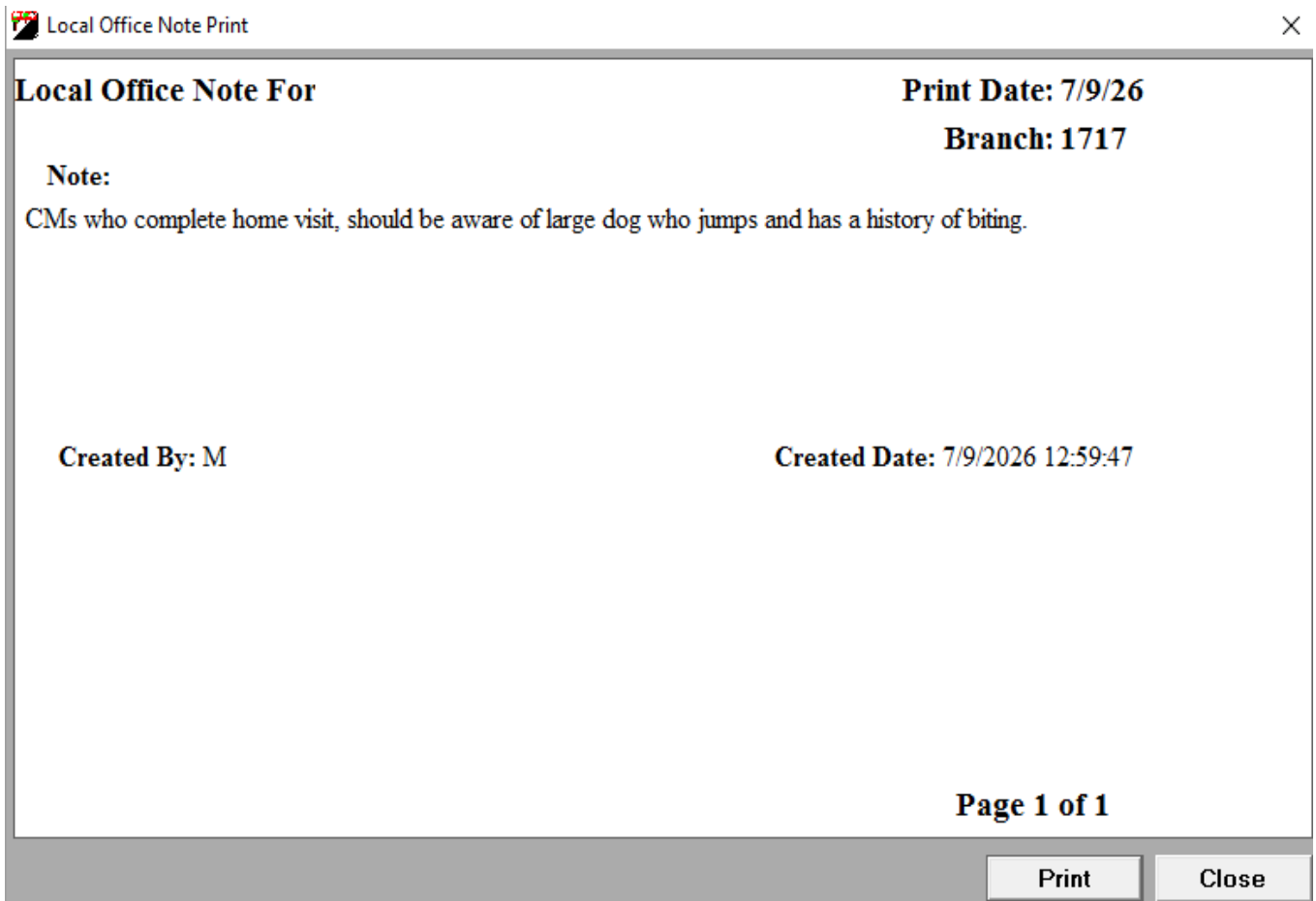
- When a Sticky Note is changed, staff may view the Sticky Note history by selecting the 'Note History' tab.
- Filters include:
 - Note Type (Defaults to 'All')
 - Date range: From (Defaults to one year in the past from date the History tab is viewed) / To (Defaults to the date the History tab is viewed)
 - Created By (Defaults to 'All')
- Note History column headers include:
 - Note Type
 - Local Office
 - Central Office
 - Note Text
 - Created By
 - Name of the staff person who created the Sticky Note
 - Created Date
 - Date the Sticky Note was created
 - Modified By
 - Name of the staff person who modified the Sticky Note
 - Modified Date
 - Date the Sticky Note was modified

Printing Sticky Notes

- Click on the 'Print' button at the bottom of the window to print the information on the tab being viewed.



- When printing Sticky Notes, only the information on the tab being viewed will be included. Staff must select each tab separately to view and print the information for each tab.
- Local Office tab Sticky Note print example:



- Note History tab Sticky Note print example:

Local Office
Central Office
Note History

Note Type
All

From:
7/ 9/2025

To:
7/ 9/2026

Created By:
All

Note Type	Note Text	Created By	Created Dt	Mod By
Local Office	CMs who complete home visit, should be aware of large dog who jumps and has a history of biting.	Mi	7/9/2026 12:59:47	M
	Completed home visit on this day and was advised to call from driveway so provider can put dog in backyard.			
Local Office	CMs who complete home visit, should be aware of large dog who jumps and has a history of biting.	M	7/9/2026 12:59:47	M

Print
Save
Close

Additional resources

- Privacy and confidentiality: Sticky Notes are part of the individual's case record. Staff must follow Oregon Administrative Rule Chapter 407, Division 14, including all applicable privacy and confidentiality requirements, when creating, editing, viewing, printing or using Sticky Notes.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or 503-945-5600. We accept all relay calls.



OREGON DEPARTMENT OF
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