

Documenting Case Notes: Using the SOAP Method

University of Illinois at Chicago
College of Nursing

Purpose

- ❑ To describe the SOAP method for documenting case notes
 - ❑ To understand the importance of documenting case notes
 - ❑ To understand when and where to write a case note and what to write in a case note
 - ❑ To demonstrate how to enter a case note in the MFP Web Application
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Objectives

The reader will be able to:

- State the purpose of using the SOAP method
 - State when and where he/she should write a case note
 - Apply the SOAP method when documenting case notes in the Web App
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When should I write a case note?

- ❑ After a home visit with an MFP participant
 - ❑ After a phone call with an MFP participant
 - ❑ After a office visit with an MFP participant
 - ❑ You can document case notes pre- and post-transition
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Where do I write my case note?



MFP TRANSITIONS

MFP First Contact – (Form A) [Edit This Form](#)

Participant Information

Form's Date: 10/12/2009 Participant's Name: **Darla D Doe**

Current Residence(Facility) Name: XXXX XXXXX XXXXXX
Address: XXXXXXXXXXXX

Current Residence(Facility) Address: XXXXXXXXXXXX
Address: XXXXXXXXXXXX

RIN: XXX-XX-6789 Program: **DRS**

SSN: XXX-XX-6789 Name of agency conducting first contact: **Testdrs**

State Agency ID# (DRS Only): First and Last Name of person assisting with transition: **Valerie W**

Date of First MFP Face to face 10/1/2009 Transition Coordinator: **Valerie W**

Survey Date	Form
10/12/2009	Form A
10/12/2009	Form F
10/12/2009	Form H & I
3/22/2010	Form H & I
10/12/2009	Form J

[Click to Add/View Notes](#)

Important Note: Only forms E, F, H & J, M can be added multiple times. For Other forms please click on Edit this Form link to make the changes.

- ❑ Enter your notes in the MFP online forms system, in the client's record. Click on the link to Add/View Notes.
- ❑ When you enter a note, the current date will automatically populate. Change the date to the date you had a visit with participant.

Notes Field in Online Forms



Enter case note here, then click "Add Comment" to upload the note.

Welcome Valerie W, Logou

PARTICIPANTS

Add Notes and View Previous Notes for Darla Doe

Today's date:
4/12/2010

Notes:

Add Comment

cancel

Comments: 1 - 1 (1)

Entered By = Search

Entered By	Entered Date	Notes
Valerie W	4/6/2010	TC met with Felix for a scheduled home visit today. Felix said things were going well. The home was clean. The appliances were in well working order. Felix appeared very happy in his new apartment. TC reviewed the 24-hour back-up plan and personal resource list with Felix. TC discussed budgeting with Felix. Felix shared his utility bills with TC. TC reviewed medication list with Felix. Felix stated he was at the doctor's last week and the doctor changed some of his medications around. TC updated Felix's medication sheet. TC told Felix she would be back next Tuesday to visit him. Felix stated he didn't need anything else, but he would call her if you needed something before their next visit together.

What should I include in my case note?

Use the SOAP method:

- **S**ubjective
 - **O**bjective
 - **A**ssessment
 - **P**lan
-

Purpose

SOAP Notes & MFP:

- Case notes increase effective communication among transition coordinators, transition coordinator supervisors, and UIC Pod leaders.
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Definition of SOAP

- A method of documentation used by service providers to describe events that took place during time spent with individuals either on the phone or in person.
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Subjective

- ❑ Describe how the participant feels
 - ❑ *Example:* Participant reported he was “feeling well and had no concerns.”
 - ❑ Document what the participant says about his/her current living situation
 - *Example:* Participant reported he is “happy, healthy and enjoying his new apartment.”
 - ❑ Record exact words participant uses to describe his health or living situation
 - *Example:* Participant reported he has had a “dull headache for the past week.”
 - ❑ Document any changes mentioned by the participant related to his medication regimen, diet, blood pressure, blood glucose levels, etc.
 - *Example:* Participant reported he went to the doctor this week for a regular visit and the doctor told him his “blood pressure was high and he increased one of his heart pills.”
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Objective

- Document your perception of the participant's physical state.
 - Example: When I went to visit Mr. Yoder today, he was very tearful throughout my entire visit with him.
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Assessment

- Be observant.
 - Report on the participant's environment.
 - *Example:* "The home was clean. The appliances were in well working order."
 - Document your interpretation of the subjective and objective elements.
 - *Example:* Participant met with a dietician a week ago about how to follow a diabetic diet. TC asked participant if he was following a diabetic diet. Participant stated, "Yes". TC inspected participant's refrigerator and freezer and found a tub of ice cream and several 2L bottles of regular soda.
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Plan

- Document how you plan on managing the participant's concern.
 - *Example:* Participant stated he was "running low on a medication." Using the 24-hour back-up plan, TC assisted participant in calling his pharmacy to order a refill.
 - Report on issues brought up throughout your visit with the participant.
 - Clearly describe what was discussed or what you advised the participant to do during your visit.
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Plan

- Document follow-up actions by either you or the participant.
 - *Example:* TC presented several options for participant to pay his bills (e.g., Currency Exchange, local bank). TC told participant they would discuss it at their next home visit on April 12. Participant was in agreement.
 - May include management components such as: education, counseling, community resources, diet, activity, medication management, and follow-up with health care provider.
 - *Example:* TC reviewed the 24-hour back-up plan and exit strategy in case of an emergency with the participant and his daughter.
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Example of a Case Note Using the SOAP Method

4/6/10: TC met with Felix for a scheduled home visit today. Felix said things were going well. The home was clean. The appliances were in well working order. Felix appeared very happy in his new apartment. TC reviewed the 24-hour back-up plan and personal resource list with Felix. TC discussed budgeting with Felix. Felix shared his utility bills with TC. TC reviewed medication list with Felix. Felix stated he was at the doctor's last week and the doctor changed some of his medications around. TC updated Felix's medication sheet. TC told Felix she would be back next Tuesday to visit him. Felix stated he didn't need anything else, but he would call her if you needed something before their next visit together.

MFP "Notes" Section

Notes

TC met with Felix for a scheduled home visit today. Felix said things were going well. The home was clean. The appliances were in well working order. Felix appeared very happy in his new apartment. TC reviewed the 24-hour back-up plan and personal resource list with Felix. TC discussed budgeting with Felix. Felix shared his utility bills with TC. TC reviewed medication list with Felix. Felix stated he was at the doctor's last week and the doctor changed some of his medications around. TC updated Felix's medication sheet. TC told Felix she would be back next Tuesday to visit him. Felix stated he didn't need anything else, but he would call her if you needed something before their next visit together.

Example note written in the online system.

Questions?

Contact your UIC Pod Leader