

The S of a SOAP Note

Subjective

Obtained from the client	This page interprets the <i>meaning</i> of the ‘S’ section.
Client Perspective	<p>Gather information about a client’s thoughts or opinions on their condition, experience, and session/intervention.</p> <p>Record their report on limitations, concerns, or problems. <i>This includes pain, fatigue, and expression of feelings or concerns including their goals and treatment plans.</i></p>
Quote the client	<p>Capture direct statements.</p> <p><i>When using quotations, it is assumed that the client made the statement.</i></p>
Keep it Specific	<p>Specific comments are more relevant and significant to your session.</p> <p>If the client makes a general comment such as “I don’t feel well,” ask specific questions such as “where” or “how.”</p>
Family or Caregiver Support	<p>Some clients, such as young children, may be nonverbal.</p> <p>Gather information from their caregiver and other professionals in these instances.</p>
Remember	<p>Keep it pertinent. Listen effectively. Ask relevant questions to inform your session.</p> <p>Information from the client’s history (occupational profile) typically does not need to be repeated in the ‘S’ section.</p>

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Gateley, C. A. (2024). *Documentation manual for occupational therapy*. Slack, INC.

The O of a SOAP Note

Measurable, Quantifiable, Observable

Opener	<p>This page states the length, setting, and purpose of the session.</p> <p><i>Where, what, how long, why.</i></p>
Followed by	<p>Briefly describe (in 1-2 sentences) the key deficits affecting the performance.</p> <p><i>Paint a picture of the client.</i></p>
End with	<p>Summarize and quantify what you observed.</p> <p><i>Discuss the interventions completed and the client's response to those interventions.</i></p>
Organization	<ul style="list-style-type: none">● Chronological (tends to be wordy)● Categorical (recommended - focuses on the "skilled" portion of the interventions)
Categorical Examples	<ul style="list-style-type: none">● Functional Mobility● UE ROM and Strength● Hand Function or Hand Development● Cognition● Education● Safety Awareness● Problem-Solving<i>and many more</i>
Remember	<p>Focus on the occupation, even after the key deficits.</p>
Keep it Skilled	<p><i>How did OT intervene to promote a skill?</i></p>

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The A of a SOAP Note

Problems, Progress, Potential

Assess the Data	This page interprets the <i>meaning</i> of the ‘A’ data.																			
First - Mention the Problems	The problem areas will justify continuation of OT services. Include contributing factors (the deficits). <i>Discuss areas of occupation impacted by these factors.</i> Deficits in (contributing factors) limit (occupation) .																			
Followed by the Progress...	What improvements have you observed? <i>Demonstrate how therapy has been effective</i> <div>or</div> <i>Explain why there has been a lack of progress.</i>																			
...and the Potential	Comment on the potential for improved performance! <u>Observation of improved performance</u> indicates <u>potential and/or progress</u> toward _____.																			
End with Justification	Justify the need for continued services to set up the plan. Client would benefit from _____ to facilitate _____ needed for success in (mention occupation) .																			
Remember	Document the need for OT to justify services.																			
Skilled Therapy	Action words <table><tr><td>Accommodate</td><td>Provide</td><td>Prevent</td><td>Promote</td></tr><tr><td>Facilitate</td><td>Regulate</td><td>Support</td><td>Prepare</td></tr><tr><td>Implement</td><td>Reinforce</td><td>Modify</td><td>Stabilize</td></tr><tr><td>Apply</td><td>Strengthen</td><td>Coach</td><td><i>and many more</i></td></tr></table>				Accommodate	Provide	Prevent	Promote	Facilitate	Regulate	Support	Prepare	Implement	Reinforce	Modify	Stabilize	Apply	Strengthen	Coach	<i>and many more</i>
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The P of a SOAP Note

Plan

Writing the Plan	This page interprets the <i>meaning</i> of the 'P' section.
Include	<ul style="list-style-type: none">• Frequency; Duration; Discharge location• Purpose of continued therapy• Specific interventions for the next session <p>Pt. will be seen (<u>frequency</u>) for (<u>duration</u>) to address (<u>skills needed</u>). Treatment to include (<u>specify upcoming interventions</u>).</p>
Referrals	<p>When necessary, include referrals to other providers.</p> <p>It is recommended to add a justification for this (why are you making this recommendation)?</p>
Purpose of the Plan	<p>This helps other therapists, including an OTA, know how to best proceed with patient treatment.</p> <p>May include discharge location or setting.</p> <p>Improves continuity and quality of care.</p>
Establish the Frequency and Duration	<p>This is often based on professional judgement. The anticipated frequency and duration should align with the patients' goal achievement timeline.</p> <p>It can also be established by the setting, funding source, or a physician's order.</p>
Remember	<p><i>Stating the duration is necessary to establish an expected length of therapy and/or plan for re-evaluation.</i></p>

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