



# SOAP Note / Written Documentation Needs Assessment and Course Methodology Evaluation for an On-line Course

Ann Snyder, PharmD, BCPS

Departments of Pharmacotherapy and Translational Research, University of Florida College of Pharmacy, Gainesville FL

## ABSTRACT

### Objectives

Primary objective was a needs assessment to develop and then evaluate on-line learning methods for enhancing pharmacist SOAP progress note writing. The secondary objective was to establish evidence of validity for a rubric to guide writing and grading.

### Methods

A SOAP note scoring rubric was developed. A progress note learning activity in an organ system course in Winter 2009 was implemented. Results at faculty workshop in Spring 2009 were presented with discussion and surveys. Fall 2009 foundation course was developed. The module included learner informed consent, pre-survey, graded sample note activity prior to and after lecture, 42 question multiple attempt self assessment identifying proper category for S, O, A, P, and a post survey.

### Results

- ☑ The SOAP notes scored prior to the lecture discussion at the workshop revealed 22 of the 25 faculty members indicated they would require the student to rewrite the note. However, 14 of the 22 rewrite requests had rubric passing scores.
- ☑ Survey respondents agreed the rubric provided good direction and guidance about the qualities of a well written note. However, 14 of 25 respondents indicated the initial rubric was too complicated and too detailed for grading efficiently. A revised rubric was developed based on their input.
- ☑ 49% of the 93 foundation course participants stated no instruction about how to document patient care prior to course. If received method helped to develop skills showed 50.5% job training, 16.5% stated intern / externship, 15.5% both intern / externship and job training, and 17.5% self-learned.
- ☑ On the post survey on average 50% learners rated only knew 50% of the necessary components for subjective and objective information, 42% for assessment, 88% for recommendation, and 83% for monitoring plan.
- ☑ 82% used self assessment, 1 attempt by 22%, 2-3 attempts by 54%, and 4 attempts by 10.5% (attempt range 1-9).
- ☑ All post survey respondents stated the combinations of lecture examples, self assessment, grading note exercise, and the rubric were useful for learning and practicing written documentation.
- ☑ Student's ability to grade and assess the appropriateness of note improved after the learning activities.

### Implications

On-line methods can be effective for learning basic SOAP / written documentation.

## INTRODUCTION

Currently the universal the standard for documentation is the SOAP note<sup>1-5</sup>. The SOAP and FARM learning methods are the 2 most common methods that are combined nationally<sup>3</sup>. Rubrics are used for learning and teaching in addition to assessment. It can define a standard for learner and the grader allowing consistent and fair assessment. Providing a foundation for consistency and repetitive feedback to ensure the learner achieves a defined standard<sup>5</sup>. The pharmacist documentation rubric is intended to be a criteria checklist for the learner and grading scale for educators.

Training tools were developed and implemented but students still struggled with effective and efficient note writing in practice. Foundations is the first semester of nine in a blended distance learning program. In addition to the rubric a learning model was developed in Fall 2009. It has been identified that the students need repetition to learn effective note writing skills.

## METHODS

- ☑ A rubric and primary trait analysis for grading progress notes was developed by the primary author.
- ☑ Face validity was then established by having 3 faculty members review it for usefulness and completeness.
- ☑ 40 affiliate faculty members were encouraged to use the rubric during a course which required students to write a progress note.
- ☑ A faculty workshop was then held where 25 participants scored a SOAP note and the group discussed the assigned ratings. The scores were analyzed to assess the rubric sensitivity.
- ☑ During the workshop, a post survey was administered to assess utility of the rubric when assessing students.
- ☑ An on-line E-learning based module was developed and IRB approved for 93 1st semester pharmacist in a working professional (PharmD) doctorate program.
- ☑ Module included learner informed consent, pre- and post- survey, and a graded sample note activity prior to and after all on-line activities for comparison. Activities included a lecture and a 42 question multiple attempt self assessment to check their ability to identify proper S, O, A, P, categories.
- ☑ The developed and face validated rubric by 3 faculty and 25 affiliated members was used for the grading the same note post lecture activities.

## RESULTS

SOAP Note Checklist / Evaluation Form		
Items must "pass" to achieve a passing grade on the SOAP note		
Name:		Note Section for feedback
Demographic information, chief complaint and history of present illness (HPI) described is clear / accurate with <b>only pertinent CMH and PMH</b> in the appropriate order	Pass/ Fail	
Identified and collected the necessary information	Pass/ Fail	
Additional pertinent information necessary to support assessment is present (i.e. non-compliance, overuse of medication, recent medication changes, job status, living environment, qualification / quantification of social behaviors)	Pass/ Fail	
Only information directly pertaining to assessment is included	Pass/ Fail	
<b>OBJECTIVE</b>		
Necessary vital signs listed and labs based on patient, medication, and medical condition	Pass/ Fail	
Only pertinent studies, test, microbiology, scans or diagnostic procedures included	Pass/ Fail	
Objective data is complete for assessment & clear when data was obtained	Pass/ Fail	
Current medications for assessment & allergies completely collected and described	Pass/ Fail	
<b>ASSESSMENT</b>		
Medication-related problem is clearly stated, non-judgmental, and individualized to patient <b>specific therapeutic goal (if all 3 components are not present = omission)</b>	Pass/ Fail	
Findings/ trends are interpreted using logical reasoning to support existence and importance of <b>why it is a problem</b> based on therapeutic goal (could include non-compliance found upon patient education)	Pass/ Fail	
Reasonable therapeutic option(s) (alternative to current therapy) stated with benefits and / or hazards of each to support recommended therapy and monitoring "Your Rationale"	Pass/ Fail	
Patient, medication, and health specific findings are clearly evaluated and included in rationale	Pass/ Fail	
<b>PLAN</b>		
Primary plan is clear and complete with drug, dose, route, frequency, directions and duration if pertinent ( <b>enough information to write order</b> )	Pass/ Fail	
Plan represents a reasonable clinical option that addresses primary health concern and minimizes patient harm and financial concerns	Pass/ Fail	
Education on most pertinent medical & medication issues in accordance w/ JACHO	Pass/ Fail	
Monitoring plan complete for both efficacy / toxicity with specific individualized monitoring goals based on current status of the patient ( <b>What, when, who, how often and what action</b> may be needed for your "safety net" / contingency plan: "If" statement based on a change in parameter)	Pass/ Fail	
Brief contingency plan is stated and based on individual specific parameters	Pass/ Fail	
<b>FORMAT- If data in the note is NOT in the proper section (i.e. assessment in plan) or an item is missing student must resubmit</b>	Pass/ Fail	
Heading includes date, time, identification of pharmacy note, and one phrase overview of reason for note	Pass/ Fail	
Original, References, legible signature, printed ID, contact information if appropriate	Pass/ Fail	
<b>OVERALL EVALUATION</b>	Pass/ Fail	

## CONCLUSIONS

- ☑ There is significant variation among a practice faculty when assessing a SOAP note. When implementing skill deficiencies in the curriculum it requires baseline assessment of faculty knowledge and skill. A rubric can facilitate better understanding among faculty about the qualities of a well written note. Those faculty who used the primary trait analysis to further describe competency found it useful. A faculty workshop can lead to development of a rubric that is more practical for grading.
- ☑ Scoring rubric not necessary for competency based activity. It was found to increase complexity of rubric use and minimize focus on effective feedback.
- ☑ The note rubric can be an effective tool for learners and educators.
- ☑ Learners found multiple learning activities helpful for learning patient documentation skills.
- ☑ On-line methods can be effective for learning basic note writing especially when multiple learning activities are available.

## REFERENCES

1. Lacy CF, Saya, FG, and Shane RR. Quality of pharmacists' documentations in patient's medical records. American Journal of Health-System Pharmacy. 1996;53(18):2171-2175.
2. Braden L. Documentation Guidelines for Pharmacists 2004. Pharmacy Connection. January February 2004.
3. Zierler- Brown S, Brown TR; Chen D, et al. Clinical documentation for patient care: Models, concepts, and liability considerations for pharmacist. American Journal of Health- System Pharmacy. 2007;64(7):1851-1858.
4. Strand L. Pharmaceutical Care Practice: The Clinicians Guide. Acquiring the Clinical Skills You Need to Practice. 12. McGraw- Hill's. (2008) Access Pharmacy. Web. 4 June 2009.
5. Walvoord B, Johnson- Anderson V. Effective Grading: A tool for Learning and Assessment. Establishing Criteria and Standards for Grading. 5. Jossey- Bass. (1998) 65-92.