IT Dept Quick Reference Guide (QRG)



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Completing a SOAP Assessment Form

	Click on Whiteboard from the Tool Bar (if this is not visable click on view and select from menu).				
1.	View Patient Record Notific Home MPTL Message Centre Patient List Whiteboard				
2.	Select your patient from the whiteboard (once you open the record this will establish a relationship with the patient).				
3.	Ensure you are in the AHP Workflow from the main left hand menu.				
4.	Select the SOAP tab to open the workflow				
	Handover × SOAP × Outpatient Clinic Note ×				
5.	You will now see a sub Menu on the left stating all the sections within the soap which you can navigate to if needed Subjective Objective Documents (0) Labs Diagnostics (0) New Order Entry Vital Signs Past Medical History Problem List Analysis Plan Create Note Dietetics Note OT Progress Note SaLT Progress Note Select Other Note				
6.	Complete Subjective section, note the text in this section can be made bold, italic, underlined.				
7.	Ensure you saved the text by clicking on save which will annotate just below the section the last time it's contents were saved.				
8.	There are sections within the soap for viewing details within the record, i.e Documents, Labs, Diagnostics.				

9.	Complete the Objective, Analysis and Plan as in steps 6-7.				
10.	When all of the relevant sections in the SOAP workflow have been completed, you need to create the note. Click on the relevant note at the bottom of the sub menu.				
	Create Note				
	Dietetics Note				
	OT Progress Note				
	Physio Progress Note				
	SaLT Progress Note				
	Select Other Note				
11.	The SOAP note will be displayed, you can add, edit or delete the text by hovering over and selecting the relevant option				
	SOAP Note × List				
	Subjective C C C C C C C C C C C C C C C C C C C				
	Objective to get mobile				
	Analysis				
	this is what I have found				
	Plan this is what we are going to do				
	You have options for Sign/Submit, Save or Save & Close (although the save options only make the				
12.	documents viewable to you so are not advisable if you are walking away from the patient) and Cancel it				
	you wish to Discard the document. Sign/Submit Save Save & Close Cancel				
	Sign/Submit Save Save & Close Cancer				
40	The note window will open and the Type will be automatically completed. You can amend the title to				
13.	suit the note so it is obvious when looking in documentation.				
	Sign Submit Note Type: Note Type List Filter:				
	Adult Physiotherapy Progress Note				
	Health Professional, Train Twenty Physio bOAP Note 04/Apr/2018 🔤 0955 BST				
	Favourites Recent Relationships Q Clinical Staff Name				
	Contacts Recipients				
	Sign Cancel				

	4.					
14.						
	Sign Cancel					
	The note will now be viewable in Documentation.					
15.						
	Service Date/Time 🗸 Subject Type	Facility	Author;			
	04/Apr/2018 09:55:00 B Physio SOAP Note Adult Physiotherapy Progress Note	RD8-GH	Health F			
16.	To view the note single click on the title line and it will be viewable on the right hand side of the screen.					
47						
17.	If you wish to amend the note by adding additional text, click on the modify button and then enter freetext underneath where it states 'Insert Addendum Here'.					
	Modify					
	*Insert Addendum Here:					
10	Click on Sign Submit					
18.	Sign/Submit					
	The note will now state Document Contains Addenda in Bold and	and Red				
19.	De sum out Containe Adder de	and Contains Adda.da				
	Document Contains Addenda					