

Cleaning up Questions: Development and Assessment of a Pharmacy SOAP Note Workshop



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Background

- Subjective, objective, assessment, and plan (SOAP) notes, a cornerstone of health care documentation, are often difficult documentation skill for students to master
- Students transition from developing care plans, as outlined by Cipolle, Strand, Morley in their first year to writing SOAP notes in their second year¹
- After the transition to SOAP notes, during the second year, the primary focus is on students learning the overall structure of SOAP notes as students work towards more complex pharmacotherapy topics and brevity within the third year
- Research has shown that calibrated exercises and peer-review of documentation can help improve student documentation^{2,3}
- Virtual case simulations can increase student engagement and lead to improved documentation performance in the subjective domain of SOAP notes⁴
- Students often request in course review to see “real life” or practitioner examples of SOAP notes to compare what they are learning to their future practice
- Providing in-depth feedback on individual written notes takes considerable grading time.

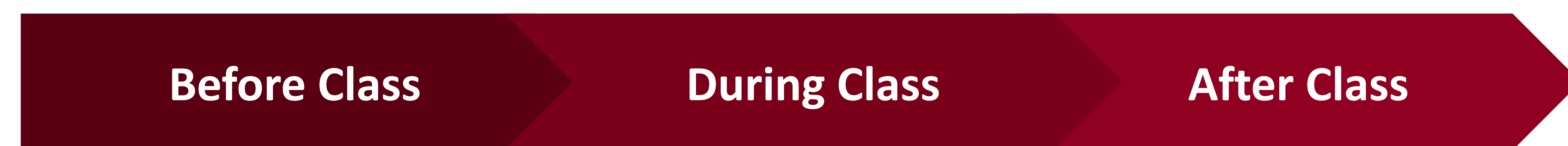
Objective

- To develop and assess a SOAP note documentation workshop for second-year pharmacy students

Methods

- Pharmacy skills lab instructors:
 - Developed a standardized patient script
 - Worked with the University’s Simulation Center to record a CMM encounter with a standardized patient and a pharmacist (who was given no background info on the case)
 - Developed three SOAP notes based off of this recorded encounter with intentional errors for students to identify
 - Shared the video with five ambulatory care pharmacists who documented a SOAP note in their personal style and documentation requirements
- See timeline below for additional logistics regarding the activities completed by students
- Descriptive statistics and Wilcoxon signed-rank test were completed to compare retrospective pre/post workshop confidence in SOAP note writing

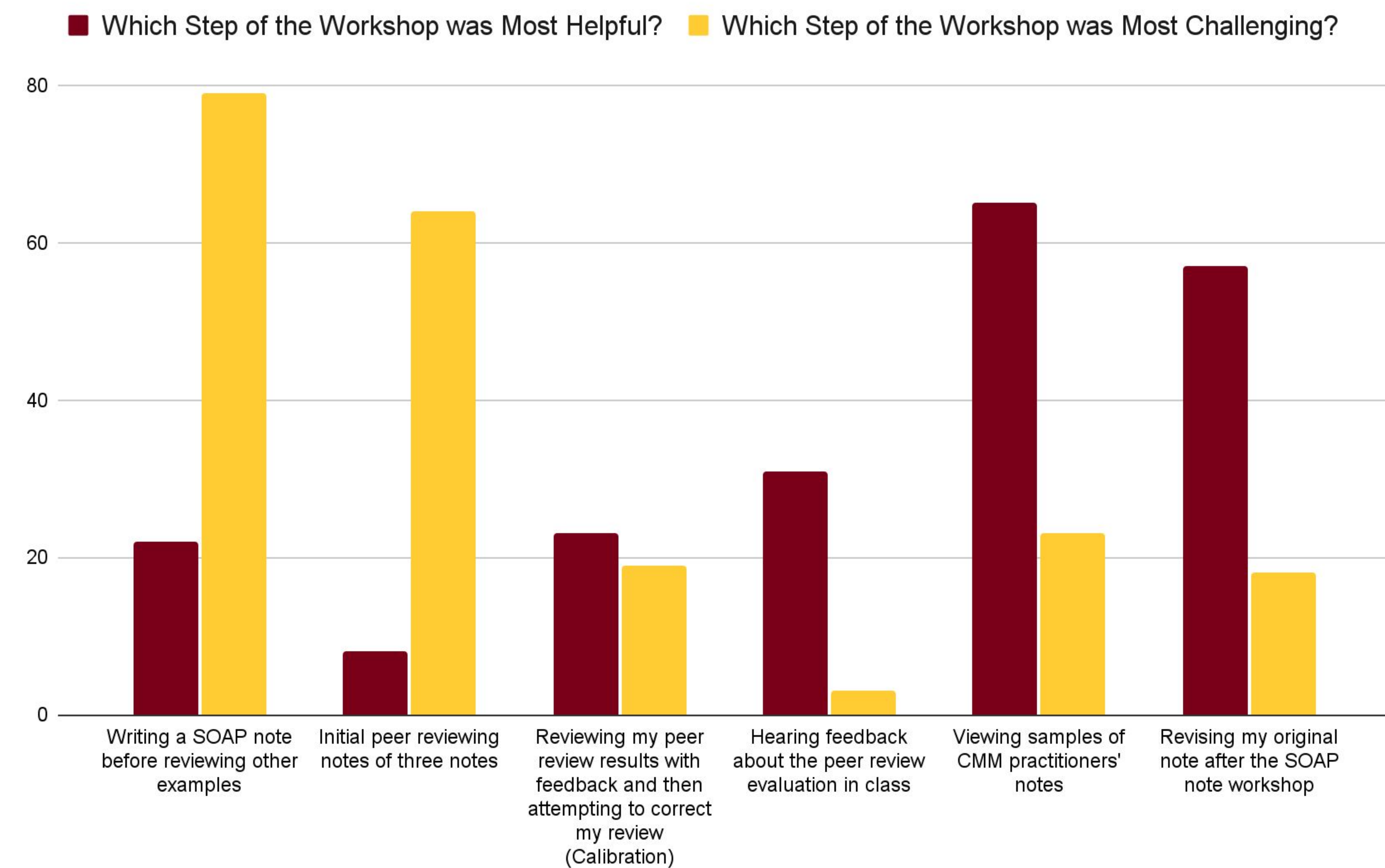
Timeline of Events



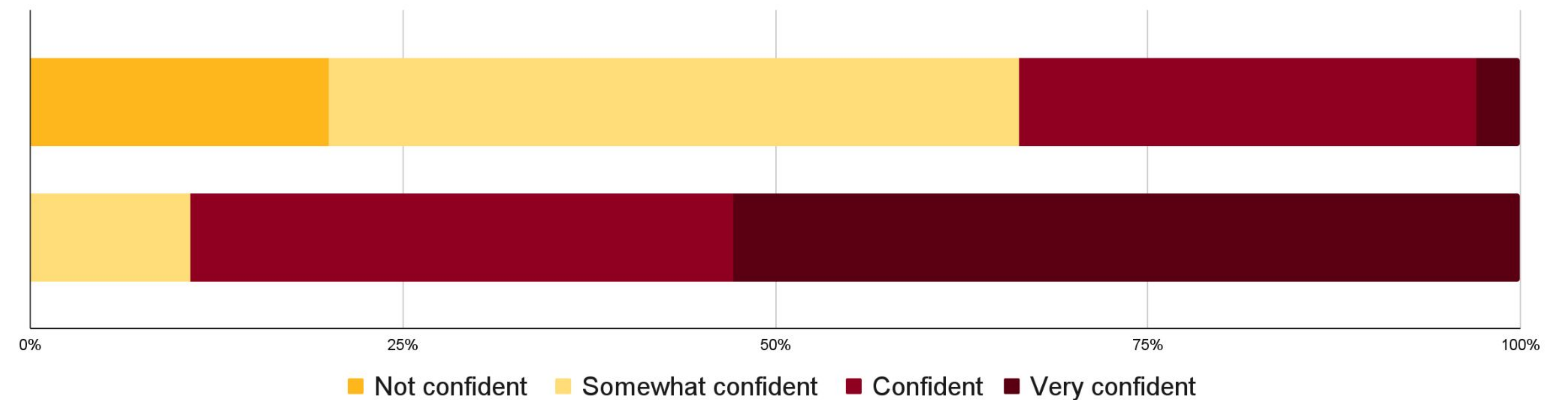
- Students watched a simulated pharmacist-patient interview video and documented a SOAP note
- Through a calibration activity, evaluated the three instructor developed SOAP notes using the course SOAP note rubric
- Students were given feedback and evaluated the same three notes again

- Clinical decisions were reviewed
- Appropriate note structure was emphasized and reviewed common error or muddy points
- Intentional errors and omissions from the three SOAP notes were revealed
- Students discussed five notes from pharmacy practitioners who watched the same video encounter

- Revised their original note based on feedback provided in class
- Completed a survey collecting feedback on the workshop and student confidence in SOAP note-writing before and after the workshop



Student Rated Confidence in Writing a SOAP Note Before and After the Workshop



Results

- In the spring of 2022 and 2023:
 - 279 students completed the SOAP note workshop
 - 208 completed some or all survey aspects
 - Student self-reported confidence in SOAP note writing increased ($p < .0001$)
 - After the workshop respondents rated their confidence at SOAP note writing
 - 164/206 - confident or very confident
 - 42/206 - somewhat confident
 - 0/206 - not confident
 - The most helpful step was viewing practitioner notes ($n=65$) followed by revising their original note ($n=57$)
 - The most challenging step was documenting their initial note ($n=79$) followed by peer review calibration ($n=64$)

Discussion & Conclusion

- Students reported a positive impact, including increased confidence from a series of documentation activities related to one case.
- Allowed a structured format for students to learn common mistakes with SOAP notes
- Future direction will be to move the workshop earlier in the second year and expand the use of calibration activity into both semesters.
- Instructors also felt the benefit of having an activity that was easier to grade than individual student SOAP note submissions, required less resources to run, and the reusability of the activity from year to year with minimal updates

References

1. Cipolle RJ, Strand LM, Morley PC. Pharmaceutical Care Practice, 3rd Edition. McGraw Hill; 2012
2. McCarty T, Parkes MV, Anderson TT, et al. Improved Patient Notes from Medical Students during Web-Based Teaching Using Faculty-Calibrated Peer Review and Self-Assessment. *Academic Medicine* 80(10):p 567-570.
3. F. Dochy, M. Segers & D. Sluijsmans (1999) The use of self-, peer and co-assessment in higher education: A review, *Studies in Higher Education*, 24:3, 331-350, DOI: 10.1080/03075079912331379935
4. Barnett SG, Gallimore CE, Pitterle M, Morrill J. Impact of a Paper vs Virtual Simulated Patient Case on Student-Perceived Confidence and Engagement. *Am J Pharm Educ*. 2016 Feb 25;80(1):16. doi: 10.5688/ajpe80116.