

THE SOAP MODEL for recording session case notes

S = Subjective Data	Subjective data refers to the client's statement of the problem as s/he sees it. The viewpoints of significant others may also be included. Consider: What are the client's thoughts and feelings about his or her situation and problems?
O = Objective Data	Record factual data and observations. The client's behavior and/or personal appearance are described, but NOT analyzed or assessed. Details concerning the client's living arrangements, financial situation, and so on, can also be included if they are relevant to the particular problem area being discussed.
A = Assessment	This is where the worker ANALYZES the meaning of the factual observation s/he has recorded and the client's perceptions of the problem that s/he has written down. Do the client's and the worker's perceptions of the problem agree? What does observed behavior tell the worker about the client and the client situation?
P = Plan	Based on the gathering of facts, awareness of the client's feelings, and assessment of what all this means, the worker states what s/he plans to do to work on the problem that has been identified.

Case Notes / Progress Notes / Interim Notes

Once the plan of service is initiated, case notes describe and assess the client situation and the service transaction at regular intervals. (Important: The progress and impact of service cannot be properly assessed unless the plan of service including goals and objectives are clearly defined.)

Case Notes—

- Document new client information and reflect changes in the client situation since service was initiated. This information serves as a basis for assessment and as an impetus to alter the Plan of Service.
- Record specific activity which may be decisive in obtaining reimbursement from funding sources or in corroborating testimony in court.
- Document level of effort and quality of services rendered.
- Document the social worker's assessment of the progress of service.
- Document critical incidents.

Case Notes include the social worker's assessment of the progress of service, such as:

- Progress in implementing the service plan, including achievement of goals and objectives.
- Movement through stages of treatment.
- The development of the client-worker relationship.

Service Reviews document periodic, formal reexaminations of service decisions and actions. These reviews include the opinion of the client and/or others acting on the behalf of the client, colleagues, and other service providers, supervisors, and consultants.

Service Reviews include:

- The date.
- Names of participants.
- Recommendations and decisions.

Following the review, the social worker may need to update the Plan of Service.

The Process of Review may be due to—

- Regular case management activity.
- Accountability.
- A case conference.
- Special consultation due to service delivery problems.
- A research or quality assurance project.