SOAP Notes Clinical Report

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Overview

The SOAP Notes Clinical Report helps you view and manage clinical documentation across your practice. You can filter appointments and clinical notes based on various criteria, then export or take bulk actions on the results

Setting Up Your Report Filters

Before generating your report, you can apply several filters to narrow down the results:

Basic Filters

- **Offices**: Select specific office locations to include in your report
- **Providers**: Choose which healthcare providers' notes you want to review
- **Patient Name**: Search for a specific patient by name
- **User Name**: Filter by the staff member who created or modified the notes
- **Contains Text**: Search for notes containing specific words or phrases
- **Date Range**: Set a start and end date to focus on appointments within a specific timeframe

Status Filters

Locked Status Options

- **Need Supervising**: Shows notes that have been completed by a provider but still require review and sign-off from a supervising physician or senior clinician. These notes are in a "pending supervision" state.
- **Need Rendering**: Displays notes where the rendering provider (the clinician who saw the patient) has not yet completed or signed their portion of the documentation.

Appointment Status Options

You can choose to exclude certain appointment types from your report:

- **Exclude Cancelled, No Show, and Rescheduled**: Removes appointments that didn't result in patient encounters
- **Exclude Optional Clinical Notes**: Filters out notes that are not required for the appointment type

Understanding Your Report Results

Once you generate the report, you'll see the following information for each appointment:

Clickable Links (Hyperlinks)

- **Patient Name**: Click to view the patient's chart record
- **Date**: Shows the date of service; click to view appointment details
- **Supervising Signed Off**: Click to access detailed information about supervision status
- **Clinical Note Status**: Click to perform actions on the note

Display Information

- Rendering Provider: Shows the name of the clinician who provided the service (not clickable)

- Locked (Rendering Signed) Status: Displays "Yes" if the rendering provider has signed and locked their note, or "No" if it's still open for editing

Clinical Note Status Options

The system shows the current status of each clinical note:

- **Start Note**: The note hasn't been created yet; click to begin documentation
- **Edit Note**: The note exists but is still being worked on; click to continue editing
- **View Note**: The note is complete and locked; click to view the final version

Export and Action Options

After generating your report, you have several options available in the message center:

Export Features

- **Export Report to Excel**: Downloads the entire filtered report as an Excel spreadsheet for further analysis or record-keeping
- **Print Non-Blank Clinical Notes**: Generates a printable version of all notes that contain documentation (excludes empty notes)

Bulk Actions

- Bulk Lock Non-Blank Notes: Automatically locks all notes in the report that contain documentation, preventing further edits. This is useful for finalizing multiple notes at once.