Goal Directed Charting: Developing Competent Clinicians

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A VARIETY OF HEALTH CARE documentation formats have evolved over the years, but their essential components are similar. Documentation (or “charting”) formats include the SOAP Note (Subjective, Objective, Assessment, and Plan),1,2 Patient/Client Management Note (history, systems review, tests and measures, diagnosis, prognosis, and plan of care),3 HIPS (History, Inspection, Palpation, and Special tests),4 HOPS (History, Observation, Palpation and Special tests),4 and combinations of these formats. Each documentation format has very specific information organization characteristics (see Table 1).

The documentation formats outlined in Table 1 appear to be straightforward, but the authors have observed less than adequate charting among athletic training students and physical therapy students. This report presents a goal-directed charting (GDC) format that is combined with a SOAP note structure. This charting framework does not abandon the fundamental structure of the SOAP note format, but does represent a different approach to documentation of critical information.

Need for Thorough Documentation

The Board of Certification, Inc. Standards of Professional Practice5 includes the following: “appropriate diagnosis, treatment, program discontinuation, and documentation of each.” Documentation of “objective measures” is necessary for an athletic trainer to comply with the Standards of Professional Practice. For example, a patient’s level of function must be determined for the athletic trainer to practice diagnostic reasoning (Standard 4); “examination measures” are required to set short-term and long-term goals, determine and implement appropriate treatment/rehabilitation intervention, and to determine program effectiveness (Standard 5); and the athletic trainer must determine when the patient has received “optimal benefit” from the treatment/rehabilitation program (Standard 6). Compliance with these standards requires continual documentation of objective measures.

As educators, clinicians, and clinical supervisors with 40+ years of combined experience, we are extremely concerned with the sparse documentation of objective measures in athletic training and physical therapy notes, both among students and credentialed clinicians. We have emphasized the need for objective measures in numerous courses that address injury diagnosis, rehabilitation, therapeutic modalities, and clinical administration. Each of these courses has reinforced...
### TABLE 1. Overview of Commonly Used Charting Frameworks

<table>
<thead>
<tr>
<th>Documentation Category</th>
<th>Definition</th>
<th>Examples of Information Obtained</th>
<th>SOAP</th>
<th>HIPS</th>
<th>HOPS</th>
<th>Patient / Client Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subjective information</td>
<td>Subjective information includes the patient’s explanation of pain, mechanism of injury, perceptions associated with the condition his/her functional status.</td>
<td>The perceptions associated with the condition including pain, ache, stiffness, changes in sensation, and the patient’s account of his/her functional changes.</td>
<td>Subjective</td>
<td>History</td>
<td>History</td>
<td>History</td>
</tr>
<tr>
<td>Objective information</td>
<td>The objective section includes all of the professionally observable and measurable examination findings, patients mental and physical presentation, and the numerous examination measures.</td>
<td>Examples of examination measures include height and weight, range of motion, strength, vital signs, respiratory capacity, and many more measures. Objective examination also includes laboratory tests, X-rays, MRI, and many other tests that provide information.</td>
<td>Objective</td>
<td>Inspection, palpation, special tests</td>
<td>Observation, palpation, special test</td>
<td>Systems review, test, measures</td>
</tr>
<tr>
<td>Assessment</td>
<td>The assessment section includes the clinical impressions and diagnostic evaluation, a list of the problems evaluated, and the short term and long term goals regarding the patient’s condition.</td>
<td>Assessment</td>
<td>None</td>
<td>None</td>
<td>Diagnosis, prognosis</td>
<td></td>
</tr>
<tr>
<td>Plan of care</td>
<td>The plan section includes the intervention strategies to resolve the problems and accomplish the goals.</td>
<td>Plan</td>
<td>None</td>
<td>None</td>
<td>Plan of care</td>
<td></td>
</tr>
</tbody>
</table>

The need for documentation of objective measures to ensure quality of patient care, communication between members of the sports medicine team, and successful third-party reimbursement. Many authors have identified the need for objective measures from ethical, legal, and liability perspectives. Unfortunately, we have seen very few objective measures consistently documented by our athletic training students and physical therapy students.

**Obstacles to Thorough Documentation**

SOAP notation is a general framework that requires a high degree of proficiency for proper utilization.