

## How to Use the SOAP Notes

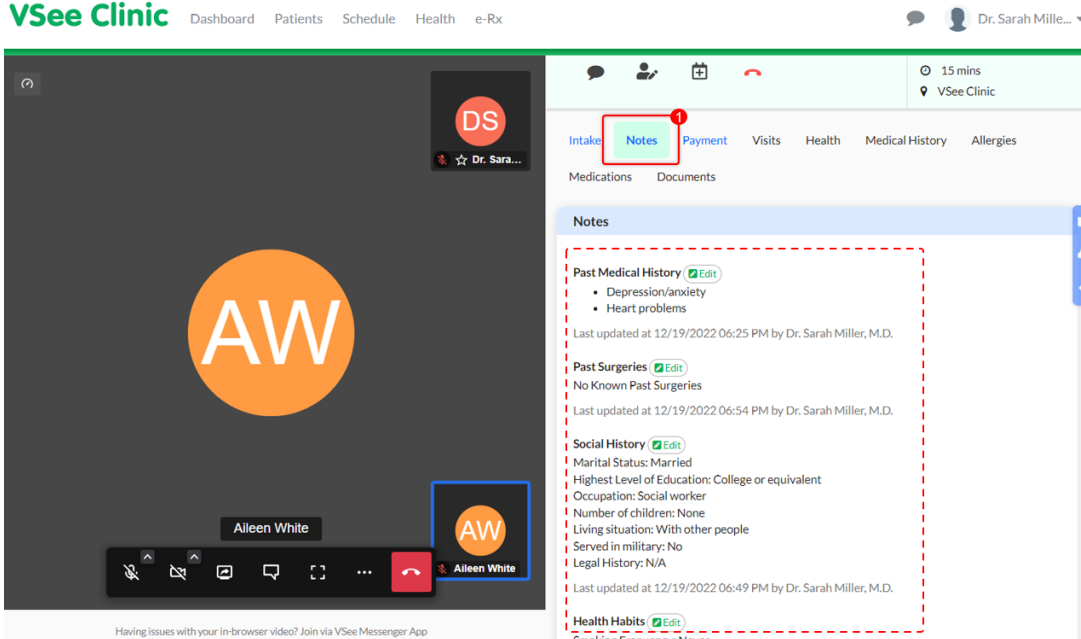
Jay-Ileen (Ai) - 2023-04-12 - VSee Clinic for Providers

While you are on the call with the patient, you can add your notes.

*Note: Updating the Notes can also be done after the visit.*

1. Click on the **Notes** tab.

You will first see the patient's **Electronic Medical Records (EMR)** section. Read [here](#) to know how to update the Patient's EMR.



The screenshot displays the VSee Clinic interface during a video call. The top navigation bar includes 'Dashboard', 'Patients', 'Schedule', 'Health', and 'e-Rx'. The user is identified as 'Dr. Sarah Miller'. The main interface is split into a video call window on the left and an EMR section on the right. The video call window shows 'Aileen White' with initials 'AW'. The EMR section has tabs for 'Intake', 'Notes', 'Payment', 'Visits', 'Health', 'Medical History', and 'Allergies'. The 'Notes' tab is highlighted in red. Below the tabs, there are sections for 'Medications' and 'Documents'. The 'Notes' section contains the following information:

- Past Medical History** (Edit):
  - Depression/anxiety
  - Heart problemsLast updated at 12/19/2022 06:25 PM by Dr. Sarah Miller, M.D.
- Past Surgeries** (Edit):
  - No Known Past SurgeriesLast updated at 12/19/2022 06:54 PM by Dr. Sarah Miller, M.D.
- Social History** (Edit):
  - Marital Status: Married
  - Highest Level of Education: College or equivalent
  - Occupation: Social worker
  - Number of children: None
  - Living situation: With other people
  - Served in military: No
  - Legal History: N/ALast updated at 12/19/2022 06:49 PM by Dr. Sarah Miller, M.D.
- Health Habits** (Edit)

You will then see **New Prescriptions** that allow you to prescribe medication for the patient. There is also a table to view the patient's recently prescribed medications. Read [here](#) to know how to use the eRX feature.

You may click on **Preferred Pharmacy** to update the Patient's selected pharmacy during the Intake process.

This screenshot shows a video call in progress with a patient named Aileen White. The patient's record sidebar is visible on the right, containing the following elements:

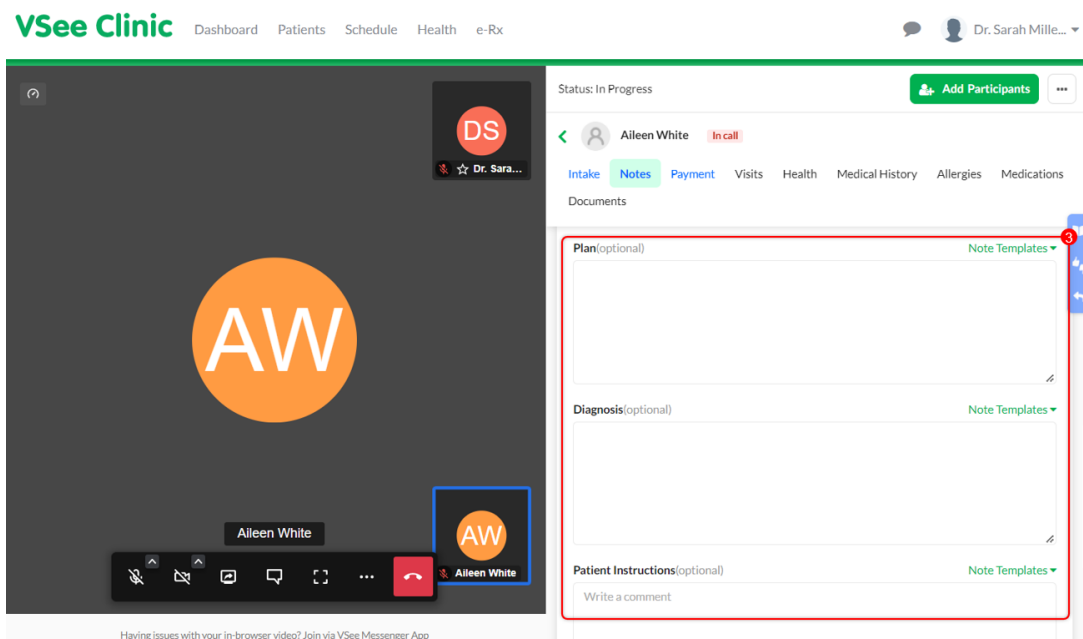
- Status: In Progress
- Buttons: Intake, Notes, Payment, Visits, Health, Medical History, Allergies, Medications
- Documents section: Last updated at 12/19/2022 06:57 PM by Dr. Sarah Miller, M.D.
- New Prescriptions** (with an Edit button)
- Search: [input field]
- Table with columns: Name, Quantity, Dispensings, Directions, Date, Prescriber, St. (No items are listed)
- Showing 0 to 0 of 0 entries
- Preferred Pharmacy** (with an Edit button)
- Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext, Petaluma, CA, 94954, 7079845571
- Subjective(optional) [text area] (with Note Templates dropdown)
- Objective(optional) [text area] (with Note Templates dropdown)
- Assessment(optional) [text area] (with Note Templates dropdown)

2. Input your notes from Subjective - Objective - Assessment.

Note: You can use the scrollbar on the right to scroll up and down the page.

This screenshot is similar to the previous one, but with a red box highlighting the text input areas for 'Subjective(optional)', 'Objective(optional)', and 'Assessment(optional)'. A red arrow points to the scrollbar on the right side of the sidebar, indicating that it can be used to scroll through the content.

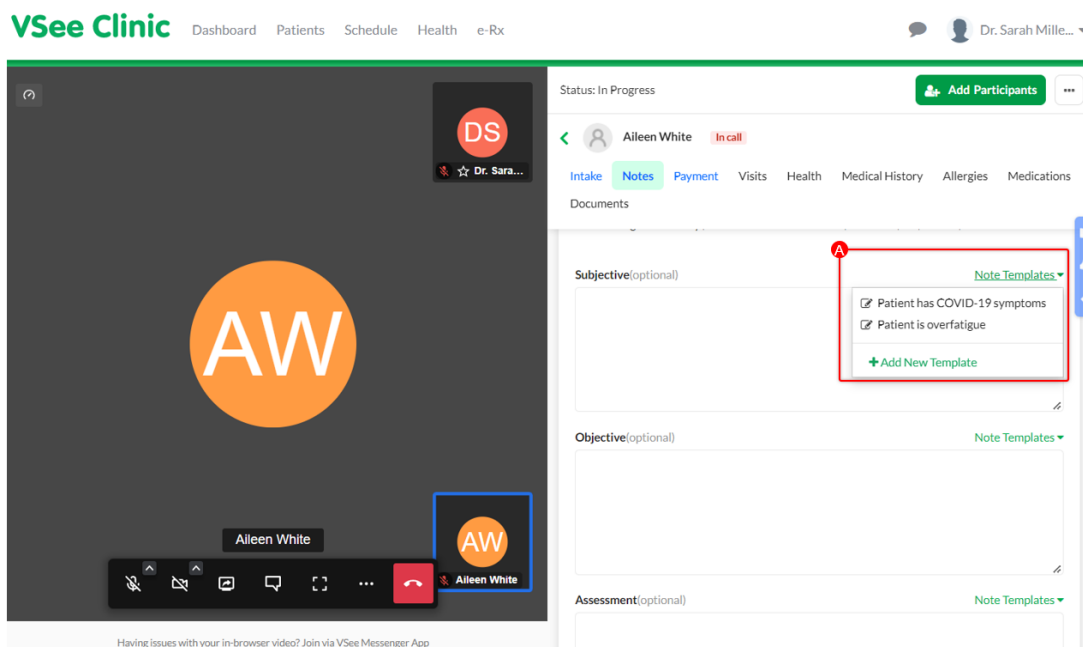
3. Input your notes from Plan - Diagnosis - Patient Instructions.



The fields for Subjective - Objective - Assessment - Plan - Diagnosis - Patient Instructions all have the option to use and add **Note Templates**. This will serve as your shortcut for faster taking down of notes during the telemedicine consultation.

*Note: You can only add text templates and not upload any files.*

A. Click on the **Note Templates** dropdown and select from the available options, or click **Add New Template**.



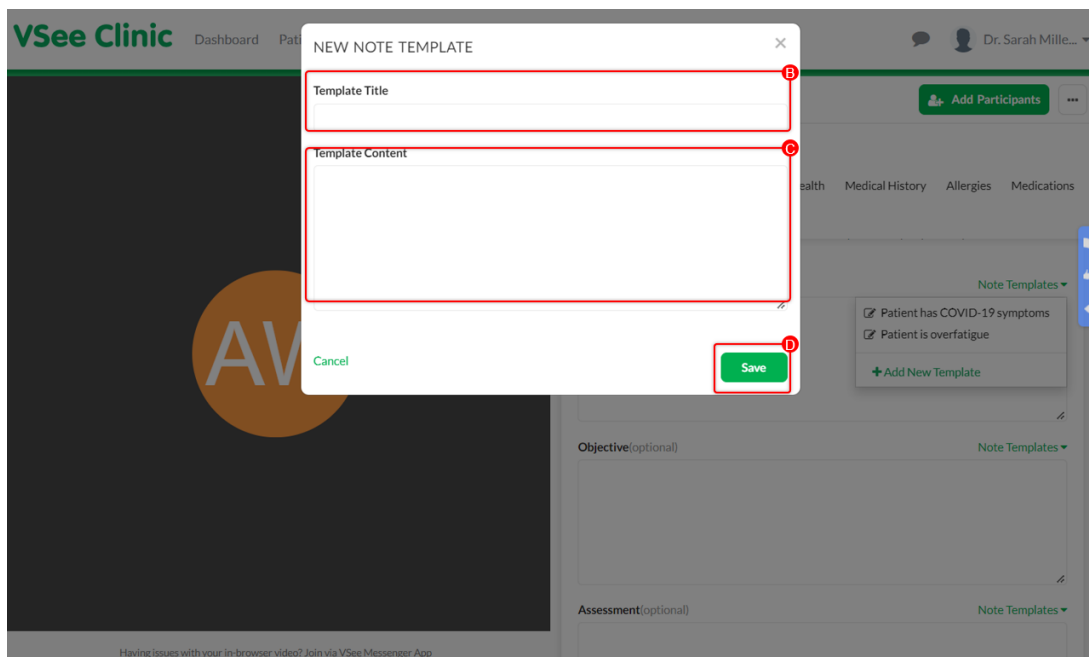
B. Add a **Template Title**.

C. Add the **Template Content**.

D. Click on **Save**.

*Note: When you add a Note template, this will still be available for you to use on your*

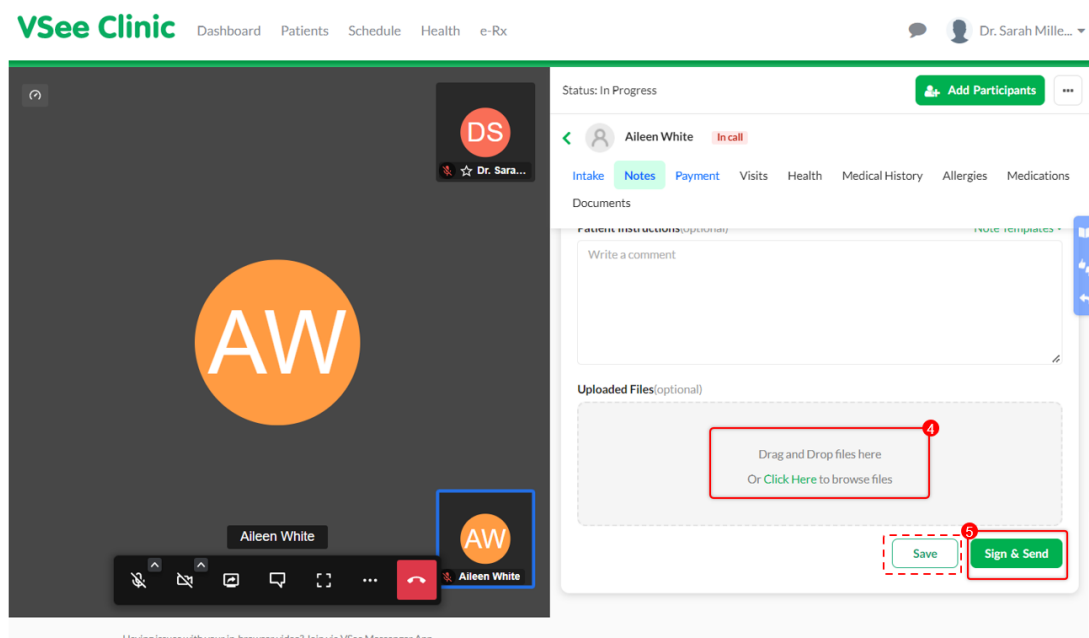
next appointments, whether it is for the same patient or for other patients of yours. These templates cannot be seen or used by other Providers of the clinic.



4. You have the option to attach files for the Patient to view in his/her visit summary.

5. Click **Sign & Send** to submit the visit summary to the patient. Or you can also click on **Save** to finish later.

*Note: Only the Patient instructions and Uploaded files will be seen in the patient's visit summary.*



You still have the option to click on **Edit** if you need to update the Notes.

*Note: An updated visit summary will be sent to the patient.*

Note: The screenshots above are taken using the new visit page version. To know how to switch to the new version, read: [Three Ways to Switch From Old to New Visit Page](#).

### Related Articles:

- [How to Edit the Patient's EMR](#)
- [How to Use eRx \(DoseSpot\)](#)

Need more assistance? Send us an email at [help@vsee.com](mailto:help@vsee.com) or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

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