

A03 SOAP / PEARL Notes — One-Page Guide + Blank Template

Scope & caveat: This chapter standardizes quick, defensible first-aid documentation using **SOAP** (Subjective, Objective, Assessment, Plan) and the interpersonal checklist **PEARL** (Partnership, Empathy, Apology, Respect, Legitimation). Adapt to your jurisdiction and organization's policies.

Overview (What this chapter is)

A practical, single-page documentation system for incidents: how to capture **facts, times, care given, consent**, and **handoff** using **SOAP**, while using **PEARL** to guide clear, professional communication you can briefly note in the record when relevant.

Prerequisite for other courses?

Assumed in **all** first-aid, CPR/AED, bleeding control, anaphylaxis, workplace responder, wilderness/remote care, school responder, and team lead courses.

Requirement for certifications?

Often evaluated during scenarios and skills sign-offs where accurate documentation is required.

Core Skills

- Write a **complete SOAP** note in **≤ 90 seconds** after an event.
 - Use **PEARL** behaviors during patient/bystander interactions and note key elements (e.g., apology for delay, respect for refusal).
 - Record **times, consent type, refusals**, and **handoff** clearly.
 - Keep records **concise, factual, legible**, and **privacy-safe**.
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Study Guide

1) Why SOAP + PEARL

- **SOAP** standardizes what happened, what you found, what you thought, and what you did—fast and consistent across responders.
 - **PEARL** keeps communication therapeutic and defensible; a line or two in the note shows professionalism (“expressed empathy; apologized for wait; affirmed concerns”).
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2) SOAP — the fast, field-ready version

S — Subjective (what they say / history)

- Chief complaint in **their words** + onset/time.
- Pertinent history (allergies/meds/events/last intake).
- Example: *“Tight chest since 10:12, worse with walking.’ Ate lunch 12:30. No allergy. On lisinopril.”*

O — Objective (what you see/find)

- Level of responsiveness (A&O×4).
- ABCs, vitals if taken, focused findings, bleeding control, deformities.
- Example: *“A&O×4. Skin cool/clammy. Breathing fast, able to speak short phrases. No severe bleeding.”*

A — Assessment (working impression)

- Non-diagnostic, plain language; include **risk** if high.
- Example: *“Concerning chest discomfort; rule out cardiac.”*

P — Plan (what you did / next steps)

- Actions, **times**, **consent**, **refusal**, **handoff**; who you called; response to care.
- Example: *“10:18 911 called; 10:20 aspirin considered—no allergy, deferred pending dispatcher; patient consent verbal; positioned of comfort; AED retrieved; 10:27 EMS handoff with report.”*

Timing aide: Jot **time stamps in the margin** as you go; slot them into P at the end.

3) PEARL — interpersonal checklist (note briefly)

- **P – Partnership:** “Let’s work on this together.”
- **E – Empathy:** “That sounds scary; I’m here with you.”
- **A – Apology:** For delays/confusion: “I’m sorry for the wait.”
- **R – Respect:** “Thank you for telling me that.”
- **L – Legitimation:** “Anyone would be worried with these symptoms.”

Chartable snippet examples (optional, in P or addendum):

- *“PEARL used: partnered on decisions; validated concerns; apologized for cold environment; thanked patient for staying still.”*
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4) Choosing SOAP vs including PEARL

- **Always** complete **SOAP** for incidents you touch or manage.
 - **Add** a brief PEARL reference if communication affected care (refusal, agitation, crowd management, delay, language barrier).
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5) Times, consent, refusal, and handoff (legal anchors)

- Record **onset, 911 call, interventions, handoff** with **hh:mm**.
 - State **consent type**: expressed (verbal/written) or **implied**; or **refusal** with capacity check + witness if possible.
 - **Handoff**: to **who, agency, time, condition, what you told them**.
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6) Common pitfalls (and fixes)

- **Vague locations** → Add exact address/entrance or trail marker/GPS.
- **Storytelling** → Stick to **facts & times**; avoid blame/diagnoses.
- **Illegible notes** → Print in block caps; keep to one page.
- **Missing consent/refusal** → Always include it in **P**.

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- **Privacy leaks** → Minimum necessary detail; no photos unless policy allows.
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7) One-Page SOAP layout recipe (fits half-sheet or single page)

- **Header (2 lines):** Date, location, your name/training, callback.
 - **SOAP box (4 short blocks):** Each with 3–5 bullet lines.
 - **Times strip (right margin):** Onset • Call • Interventions • Handoff.
 - **Sign & secure:** Signature/print name, file location.
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Performance Benchmarks (What good looks like)

- Completes **SOAP** (all four parts) **accurately** in **≤ 90 seconds**.
 - Includes **times**, **consent/refusal**, and **handoff**.
 - Objective section is **measurable** (A&O, bleeding controlled, deformity).
 - Assessment is **non-diagnostic**, risk-aware.
 - Note is **legible**, **one page**, and **privacy-appropriate**.
 - If relevant, adds a **one-line PEARL** summary.
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Red Flags & Don't-Dos

- **Don't** diagnose (“heart attack”)—write **impressions** (“concerning chest discomfort”).
 - **Don't** omit **time stamps** or **consent status**.
 - **Don't** include gossip or blame.
 - **Don't** store notes insecurely or share beyond need-to-know.
 - **Don't** copy/paste from another incident; every scene is unique.
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Quick Algorithms & Mnemonics

- **SOAP:** *Subjective* → *Objective* → *Assessment* → *Plan*.

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- **PEARL:** *Partnership • Empathy • Apology • Respect • Legitimation.*
 - **TIME4** (the four essential times): *Onset → 911 Call → First Intervention → Handoff.*
 - **CAP-H** (legal anchors): *Consent → A&O (capacity) → Privacy → Handoff.*
 - **FACTS** (good Objective writing): *Findings • ABCs • Consciousness • Temperature/skin • Severe bleeding status.*
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Supplies & Tools — what SOAP/PEARL Documentation courses typically use

(This list drives the Restock Checklist and is be mirrored exactly—same categories, same items, same order.)

PPE & Scene Safety

- Nitrile gloves — barrier protection during assessment
- Hand sanitizer — quick hand hygiene when soap/water unavailable

Documentation & Admin

- One-page SOAP Note pads (tear-off) — standardized incident records
- PEARL pocket prompt card — interpersonal checklist at a glance
- Waterproof notepad & pen — timestamps and field notes
- Clipboard — stable writing surface
- Digital time source (watch/phone) — accurate timestamps

Public-Health & Cleanup

- Alcohol wipes — sanitize pens/clipboard/phone after incidents

Optional / Setting-Dependent

- Carbonless duplicate forms — instant copy for workplace records
- Small laser/inkjet printer with pre-formatted 1-page template — restock in-house
- Translation card/interpreter access info — note interpreter name in P

Storage & Organization

- Labeled binder (SOAP Notes) — chronological filing

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- Divider tabs (Open, Closed, Refusals) — quick retrieval
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Scenario Drills & Answer Keys

Drill A — Bleeding control at shop

- **Expected SOAP (abridged):**
 - **S:** “Cut hand on glass at 14:05; pain 4/10; no allergies.”
 - **O:** A&O×4; steady venous bleed index finger; skin warm/pink; no deformity.
 - **A:** Simple laceration; bleeding responsive to pressure.
 - **P:** 14:07 pressure + gauze; 14:10 bleeding controlled; verbal consent; dressed & advised clinic; 14:20 left with coworker; PEARL: apologized for delay.
- **Benchmark:** All four parts present + times + consent.

Drill B — Chest discomfort at work (EMS activated)

- **Expected SOAP:** Includes onset time, ABCs, risk framing, AED fetched, aspirin decision per dispatcher, EMS **handoff at time** with condition; **PEARL:** empathy/respect lines noted.

Drill C — Refusal after ankle twist

- **Expected SOAP:** Capacity check in **O** (A&O×4), **A:** possible sprain; **P:** risks explained, **refusal documented** with witness name/time; RICE advice provided; callback captured.

Drill D — Language barrier

- **Expected SOAP:** Interpreter used (name/method in **P**); clear **S** history captured; privacy observed.
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Assessment Rubric & Sign-Off

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Skill	Meets Standard	Notes
Completes SOAP in ≤ 90s, legible and concise	<input type="checkbox"/>	
Includes essential times (TIME4)	<input type="checkbox"/>	
Documents consent/refusal & capacity	<input type="checkbox"/>	
Objective findings are measurable/specific	<input type="checkbox"/>	
Assessment stays non-diagnostic, risk aware	<input type="checkbox"/>	
Plan lists actions, calls, and handoff	<input type="checkbox"/>	
Optional: notes PEARL behaviors when relevant	<input type="checkbox"/>	

Instructor Sign-Off: Name/Date _____ **Learner:**

Skills Covered — Full Index

SOAP structure • PEARL behaviors • Timestamps (TIME4) • Consent/refusal documentation • Capacity (A&O×4) • Handoff reporting • Privacy-aware writing • Field legibility • Interpreter notation • Workplace record handling

A→Z Glossary — SOAP/PEARL Terms & Terminology

- **A&O×4:** Alert and oriented to person, place, time, and event.
- **Assessment (working):** Non-diagnostic impression guiding actions.
- **Handoff:** Transfer of care information to EMS/higher provider.
- **PEARL:** Partnership, Empathy, Apology, Respect, Legitimation—brief behaviors that reduce conflict and improve trust.
- **Plan:** Care/actions taken, calls made, consent/refusal, instructions given, and handoff.
- **SOAP:** Subjective, Objective, Assessment, Plan—concise documentation framework.

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- **TIME4:** Onset, 911 call, first intervention, handoff—four essential times.
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Printable Assets Pack (text masters)

One-Page SOAP / PEARL (front) — fits on 8.5×11 or half-sheet

Header

Date: ____ / ____ / ____ Time: ____ : ____ Location: _____
Responder (print/sign): _____ Training: _____ Callback: _____

S — Subjective (what they said / history)

- Chief complaint (their words): _____
- Onset/time: _____ Events before: _____
- Pertinent history (A/M/E/L): Allergies _____ Meds _____ Events _____ Last intake _____

O — Objective (what you found)

- Responsiveness: ☐ A&O×4 ☐ Altered ☐ Unresponsive • Breathing: ☐ Normal ☐ Labored ☐ Absent
- Skin: ☐ Normal ☐ Pale ☐ Cool/clammy ☐ Flushed ☐ Diaphoretic
- Findings (bleeding, deformity, swelling, tenderness, etc.): _____
- Other (vitals if taken/tools used): _____

A — Assessment (working impression, non-diagnostic)

P — Plan (what you did / times / consent / handoff)

- Times (TIME4): Onset : 911 : 1st Intervention : Handoff :
- Actions (pressure, position, Epi assist, AED, etc.): _____
- Consent type: ☐ Expressed (verbal/written) ☐ Implied ☐ Refusal documented (witness: _____)
- Instructions given / aftercare / destination: _____
- Handoff to (agency/name): _____ Condition at handoff: _____

PEARL (optional brief note)

☐ Partnership ☐ Empathy ☐ Apology ☐ Respect ☐ Legitimation — Notes: _____

Footer (privacy)

Store per policy. Minimum necessary disclosure only.

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Back (optional): lined space for sketches (scene layout), additional times, witness names/contact.

Local Customization Panel

- Organization policy reference/record retention:

 - Interpreter access (names/numbers/apps):

 - Preferred paper size (full/half sheet) & print settings:

 - Where forms are stored & how to submit after incident:

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Restock & Maintenance Schedule

(Mirrors the Supplies & Tools list exactly.)

PPE & Scene Safety

- Nitrile gloves — Inspect quantity weekly; replace sizes as used.
- Hand sanitizer — Refill/replace monthly or when <25% remains.

Documentation & Admin

- One-page SOAP Note pads (tear-off) — Print 25+ monthly; archive completed forms per policy.
- PEARL pocket prompt card — Replace worn cards quarterly.
- Waterproof notepad & pen — Replace if wet/damaged; pens quarterly.
- Clipboard — Wipe after incidents; replace annually if cracked.
- Digital time source (watch/phone) — Check time sync monthly.

Public-Health & Cleanup

- Alcohol wipes — Replenish monthly; check expiry.

Optional / Setting-Dependent

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- Carbonless duplicate forms — Keep 20 sets; reorder quarterly.
- Small laser/inkjet printer with pre-formatted 1-page template — Test monthly.
- Translation card/interpreter access info — Verify quarterly.

Storage & Organization

- Labeled binder (SOAP Notes) — Audit monthly; file by date.
- Divider tabs (Open, Closed, Refusals) — Replace as worn; verify order monthly.

Notes