

Problem List

Last Modified on 04/24/2025 10:49 am EDT

The Problem List chart tab is used to capture a list of conditions a patient has been diagnosed with. This list of problems is used to facilitate workflows throughout the application including the Superbill and Order Entry chart tabs. The Problem List chart tab will also double as the assessment for many users by adding notes to a problem via the edit window.

Problem List Overview

Problem Search

The **Add Problem** search bar allows a user to find a diagnosis that you would like to add to the selected patient's chart. When a user begins to type in the search box, a list of results are displayed.

hyper

Description	ICD	Problem	Full	
hyper				
Achalasia of esophagus (disorder)			K220,Q...	▲
Acromegaly (disorder)			E233,M...	
Actinic cheilitis (disorder)			L568,X...	
Actinic keratosis (disorder)			L570	
Adult attention deficit hyperactivity disorder (disorder)			F909	
Alcohol use disorder (disorder)			K600	

The list of returned results are categorized as either **ICD**, **Problem** or **Full**.

- **ICD**: displays a list of codes that have been added to your practice via the Diagnosis Code Setup window.

Please note, the list of Diagnosis Codes in your database are customized for your practice. You may find it necessary to add, change, or remove diagnosis codes to meet the unique needs of your practice.

- **Problem**: displays a list of SNOMED CT codes that are specifically designated as common problems. This is a helpful search tool because SNOMED provides "physician friendly" names and also supports searching by abbreviations (e.g. CKD). SNOMED CT even cross-walks to ICD codes.
- **Full**: displays a full list of SNOMED CT codes. These codes may or may not cross-walk to an ICD code.

User Settings

- Search List Type

Favorite Problem Search

If a user selects the drop down to the right of the search box, a list of favorite ICD codes will be displayed. This list of favorite codes is generated by looking at all problems that were added across the entire patient population for a given time frame. There are settings that you can change to control this experience, see the User Settings list below.

Company Settings

- Auto codify Problem List Codes to SNOMED

User Settings

- Problem List Favorite Search Type
- Problem List Favorite Search Days
- Problem List Favorite Search Max Rows

Problem List Summary

The **Problem List Summary** contains diagnoses that have been added to the patient's chart and are currently in an **Active** status. You can interact with these problems by clicking on them.

D291 Benign neoplasm of prostate (disorder)	06/18/2017
New sx occurred today. Notice odd pain in left leg that was not there before. Will send for MRI and recheck in 3 weeks.	
1	08/20/2019 5:51PM

The **Problem List Summary** will display the following elements for each code:

- **ICD Code:** This is the ICD-9 or ICD-10 code associated with the problem. Not all problems have a corresponding ICD code.
- **Problem Description:** This is the name of the selected condition.
- **Onset Date:** This is the date that the problem began or was diagnosed.
- **Notes:** On the summary view, you will see the last note added for this problem. There can be one to many notes on any given problem.
- **Last Modified Date:** This is the last time this problem was changed.
- **Priority Level:** A number representing the priority order for the condition is displayed.
- **Interaction Icon:** You may see a yellow or red triangle next to a condition. This indicates an interaction between this problem and a patients medication list.


User Settings


- Problem List Summary View


Problem List Edit Window



The Problem List Edit window is accessed when a new problem is added or a problem is selected from the Problem List Summary. This allows a user to access and update the details related to an individual Problem List item.




Edit Problem

Description  Benign neoplasm of prostate (disorder)

Snomed Term Benign neoplasm of prostate (disorder) 






ICD D291  Benign neoplasm of prostate

Priority 1  Status Active  Chronic ☒

Onset * 06/18/2017  Resolution  Type 

[New Note](#)

Modified 08/20/2019 5:51PM

C	Date	Note	Created By
	08/21/2019	New sx occurred today. Notice odd pain in left leg th...	Bowling, MD, Rob...
	08/14/2019	STill new issues with urgency and fx. Plan to f/u in 3...	Bowling, MD, Rob...
	08/07/2019	Urgency and Frequency subsided due to new meds ...	Bowling, MD, Rob...
	08/06/2019	Urgency and Frequency subsided due to new meds.	Bowling, MD, Rob...
	07/29/2019	Pain still gone - no need to re-start meds. Will f/u wit...	Myers, MD, Austin

☒ Always display window on new problem OK

The edit window will display the following elements:

- **Description:** This is the description of the problem as seen on the screen. This is pulled from the database the code was selected from.
- **Snomed Term:** A problem may or may not be linked to a SNOMED term. This typically happens automatically when selecting a problem from the 'Problem' or 'Full' option within the search.
- **ICD:** This is an ICD code lookup. This is searching the Diagnosis Code Setup table.
- **ICD Description:** This is the corresponding description for the selected ICD code.
- **Priority:** This is the priority for the given problem.
- **Status:** This is the current status for the problem.
 - Active: The problem is actively being treated and will display on the summary.
 - Inactive: The problem is not active and will not display on the summary.
 - Removed: The problem is no longer being treated and will not display on the summary.
 - Resolved: The problem is no longer being treated because it has been resolved. This will not display on the summary.
- **Chronic Flag:** This indicates that the condition is chronic or acute.
- **Onset:** This is the date the problem began. This will default to the current date when a new problem is added.
- **Resolution:** This is the date the problem was resolved. Setting this date will auto-set the status to 'Resolved'.
- **Type:** This is used to define a problem as the patient's cognitive or functional status. This is typically left blank.
 - Cognitive
 - Functional
- **New Note:** This allows a user to type or dictate a new note for the problem. This note will be time and date stamped. If a new note is added on a problem and that problem is used on the superbill that day, this

note will be added into the SOAP note.

- **Modified:** This is the date/time that the problem was last changed.
- **Note List:** This is a list of all notes that have been added to the problem over time. Clicking on a note will allow you to see a more detailed view. You can even copy forward a previous note into today's note.
- **Always Display Window on New Problem:** When selected, this will ensure that the Edit Window display each time a new problem is added from the search. If deselected, the edit window will not appear.

Problem List History

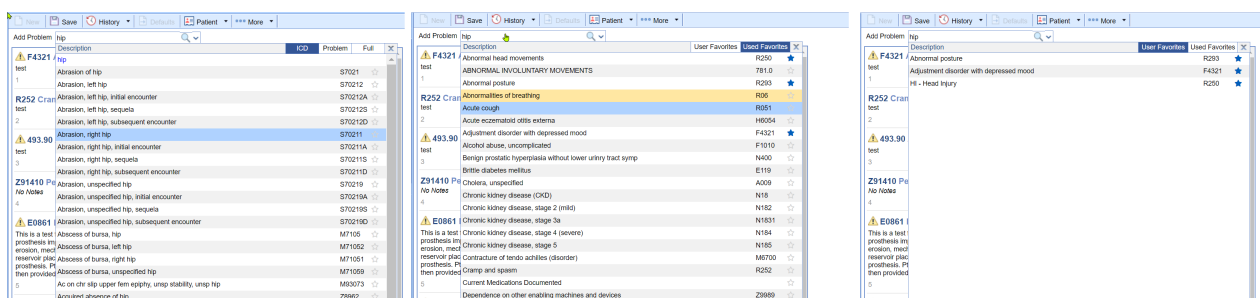
To see a complete list of all problems for a patient, regardless of status, a user can click the **History** button on the toolbar.

History							
Alert	Status	Code	Description	Onset	Modified	Note	
	Active	D291	Benign neoplasm of prostate (...)	06/18/2017	08/20/2019 5:51PM	New sx occurred today. ...	
	Active	N401	Benign prostatic hyperplasia (...)	08/22/2018	08/22/2018 11:18AM		▲
⚠	Active	E1121	Diabetic renal disease (disord...	11/05/2018	11/05/2018 1:53PM	Being treated by PCP D...	
	Active	N200	Kidney stone (disorder)	11/13/2018	07/29/2019 2:21PM	Scheduled an ESWL. ...	
	Active	N3281	Bladder muscle dysfunction - ...	02/12/2019	02/12/2019 1:37PM	Worse after subdural h...	
⚠	Resolved	R310	Gross hematuria	11/06/2018	02/12/2019 1:13PM	Resolved	
⚠	Resolved	R31	Hematuria	06/18/2017	02/12/2019 1:13PM	Resolved	
	Inactive	N20	Calculus of kidney and ureter	06/18/2017	10/02/2018 12:15PM	Inactivated	
	Inactive	R3919	Slowing of urinary stream (fin...	06/18/2017	04/03/2018 5:08PM	Inactivated	
	Inactive	R972	Raised prostate specific antig...	06/18/2017	07/06/2018 2:30PM	Inactivated	
	Inactive	N400	Large prostate (finding)	07/03/2017	02/08/2019 9:35AM	Inactivated	
	Inactive	N451	Acute epididymitis (disorder)	10/12/2017	01/16/2018 10:54AM	Inactivated	
	Removed	R9720	Elevated prostate specific anti...	05/13/2018	06/06/2018 5:50PM	Removed	

Nearly all of the same features and functionality that apply to the **Problem List Summary** window apply to the history. The major difference is that the history will display all problems including those that have been removed, resolved, and inactivated.

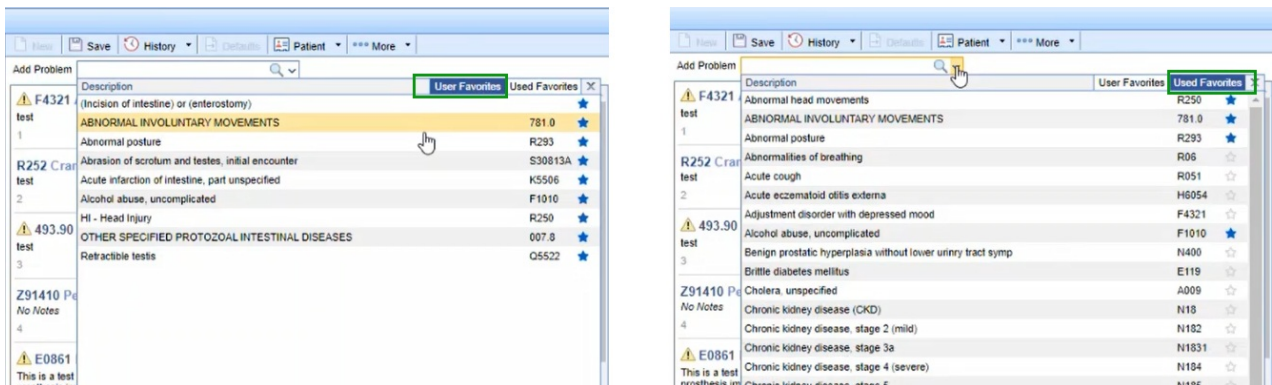
User Favorites Feature in the Problem List

Users will now notice a star icon next to each problem, allowing them to mark items as personal favorites. This star makes it easy to track and quickly access frequently used problems.

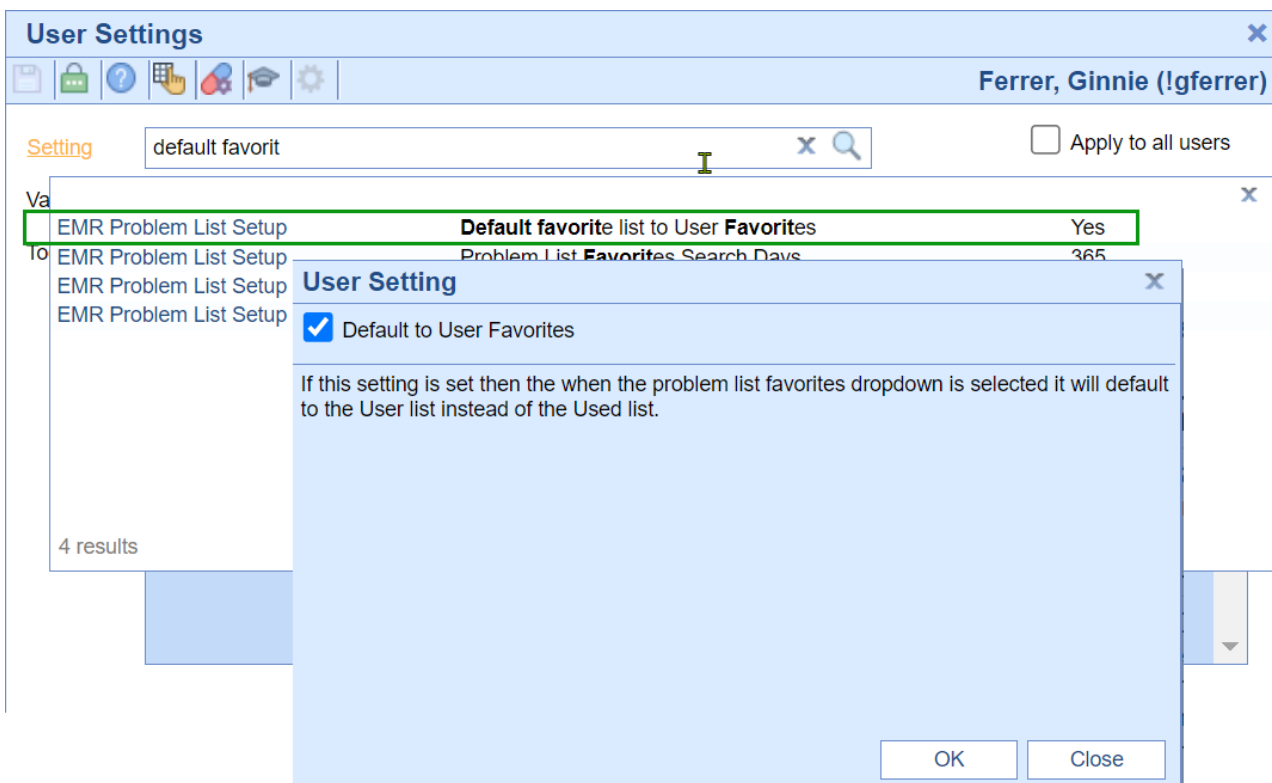


From the search bar or by using the drop-down menu in the search bar, users can access their saved lists and select or deselect the star icon to manage favorites. Items with a grayed-out star can be marked as User Favorites* by clicking the icon, turning it **BLUE**. These items will then appear in the User Favorites tab.

If a user is in the User Favorites tab and clicks the star icon next to an item, the item will be deselected, the star will turn to a gray outline only, and it will no longer appear in the User Favorites tab.

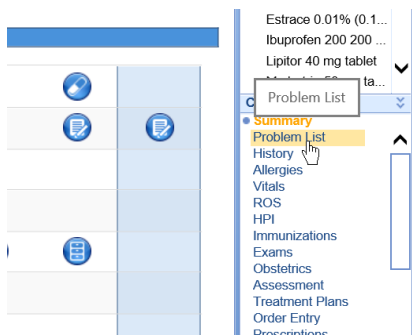


By default, the Used Favorites tab is displayed, but **users can set the User Favorites tab as their default view through a new user settings option** (*User Setting: Default favorite list to User Favorites*). This makes managing and accessing personalized lists even easier!

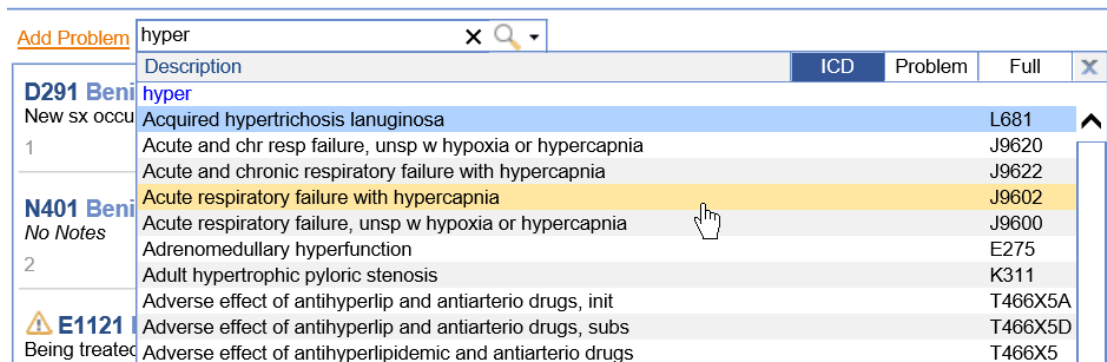


Add a New Problem

1. Once in a patient's chart, select the **Problem List** chart tab.



2. Begin typing in the **Add Problem** search box or select the drop down to display the Favorites List.



3. Once an item is selected from the list, the Edit Problem window will display. Add or change details as needed.

Edit Problem

Description * Adverse effect of antihyperlip and antiarterio drugs, init

Snomed Term *Snomed Clinical Term*

ICD T466X5A Adverse effect of antihyperlip and antiarterio drugs, init

Priority 6 Status Active Chronic ☒

Onset * 09/18/2019 Resolution Type

[New Note](#)

Modified

C	Date	Note	Created By

☒ Always display window on new problem OK

4. Click **OK** when you are done changing this problem.

C	Date	Note	Created By

☒ Always display window on new problem

OK

- Press **Save** when you are done adding all other problems.

New Save History Defaults Patient More

Add Problem

D291 Benign neoplasm of prostate (disorder)
 This patient will be seen in the office in 3 weeks to re-assess the condition. As of today's v managed with hormone therapy. Some new bone pain was mentioned. Will be addressed

Remove a Problem

To remove an active problem from a patient's chart, the status of the problem must be changed. Problems that are visible in the **Summary** view of the Problem List have a status of Active. If a problem has any other status, it is displayed in the **History** view of that chart tab. Follow these steps to remove a problem from the active list:

- Once in a patient's chart, select the **Problem List** chart tab.

Estrace 0.01% (0.1...
 Ibuprofen 200 200 ...
 Lipitor 40 mg tablet
 ta...

Problem List

Summary
 Problem List
 History
 Allergies
 Vitals
 ROS
 HPI
 Immunizations
 Exams
 Obstetrics
 Assessment
 Treatment Plans
 Order Entry
 Prescriptions

- Click on the problem item from the grid on the **Summary** window. An **edit window** will appear.

D291 Benign neoplasm of prostate (disorder) 06/18/2017
 New sx occurred today. Notice of pain in left leg that was not there before. Will send for MRI and recheck in 3 weeks.
 1 08/20/2019 5:51PM

- Change the **Status** drop down to anything other than Active.

Add Problem

D291 Benign neoplasm of prostate (disorder) 06/18/2017

New sx occurred today

1

N401 Benign prostatic hyperplasia

No Notes

2

E1121 Diabetes mellitus

Being treated by insulin

3

N200 Kidney disease

Scheduled an ES

4

N3281 Bladder cancer

Worse after subdermal

5

Edit Problem

Description * Benign neoplasm of prostate (disorder)

Snomed Term Benign neoplasm of prostate (disorder)

ICD D291 Benign neoplasm of prostate

Priority 1 Status Active Chronic ☒

Onset * 06/18/2017 Resolution Inactive

New Note

Modified 08/20/2019 5:51PM

C	Date	Note	Created By
	08/21/2019	New sx occurred today. Notice odd pain in left leg that...	Bowling, MD, Robert
	08/14/2019	STill new issues with urgency and fx. Plan to f/u in 3 ...	Bowling, MD, Robert
	08/07/2019	Urgency and Frequency subsided due to new meds c...	Bowling, MD, Robert
	08/06/2019	Urgency and Frequency subsided due to new meds.	Bowling, MD, Robert
	07/29/2019	Pain still gone - no need to re-start meds. Will f/u with...	Mvers, MD, Austin

☒ Always display window on new problem

OK

4. Click the **Save** button

New Save History Defaults Patient More

Add Problem

D291 Benign neoplasm of prostate (disorder)

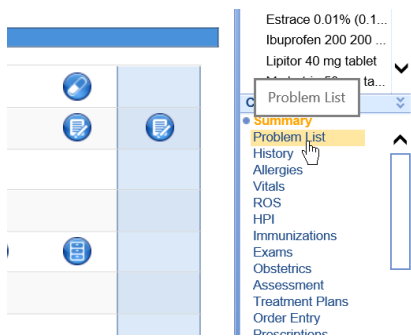
This patient will be seen in the office in 3 weeks to re-assess the condition. As of today's v managed with hormone therapy. Some new bone pain was mentioned. Will be addressed

Create an Assessment using the Problem List

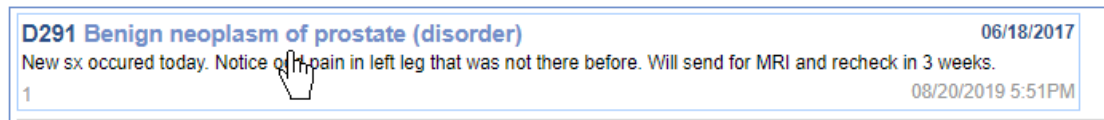
The Problem List has the ability to be used to create an Assessment/Plan for a specific condition. To do this, a user will make a comment on a problem. The user will then choose to use this diagnosis on their Superbill for that same day. When the comment and the Superbill are created on the same day, the comment will display on the note.

Step 1: Add the Assessment to the Problem

1. Once in a patient's chart, select the **Problem List** chart tab.



- Click on the problem item from the grid on the **Summary** window. An **Edit Problem** window will appear.



- In the **New Note** field, type, dictate, or copy forward an old note.

Edit Problem

Description * Benign neoplasm of prostate (disorder)

Snomed Term Benign neoplasm of prostate (disorder)

ICD D291 Benign neoplasm of prostate

Priority 1 Status Active Chronic ☒

Onset * 06/18/2017 Resolution Type

New Note
This patient will be seen in the office in 3 weeks to re-assess the condition. As of today's visit, the prostate cancer is well managed with hormone therapy. Some new bone pain was mentioned. Will be addressed with mild pain medication.

Modified 08/20/2019 5:51PM

C	Date	Note	Created By
	08/21/2019	New sx occurred today. Notice odd pain in left leg that...	Bowling, MD, Robert
	08/14/2019	Still new issues with urgency and fx. Plan to f/u in 3 ...	Bowling, MD, Robert
	08/07/2019	Urgency and Frequency subsided due to new meds c...	Bowling, MD, Robert
	08/06/2019	Urgency and Frequency subsided due to new meds.	Bowling, MD, Robert
	07/29/2019	Pain still gone - no need to re-start meds. Will f/u with...	Mvers, MD, Austin

☒ Always display window on new problem OK

- Click **OK** on the Edit Problem window.

C	Date	Note	Created By
	09/24/2019	This patient will be seen in the office in 3 weeks to re...	Head, Blake
	08/21/2019	New sx occurred today. Notice odd pain in left leg that...	Bowling, MD, Robert
	08/14/2019	Still new issues with urgency and fx. Plan to f/u in 3 ...	Bowling, MD, Robert
	08/07/2019	Urgency and Frequency subsided due to new meds ...	Bowling, MD, Robert
	08/06/2019	Urgency and Frequency subsided due to new meds.	Bowling, MD, Robert

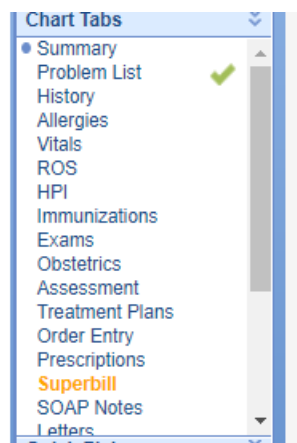
☒ Always display window on new problem OK

- Click **Save** on the Problem List chart tab.



Step 2: Add the Problem to the Superbill

1. Select the **Superbill** chart tab



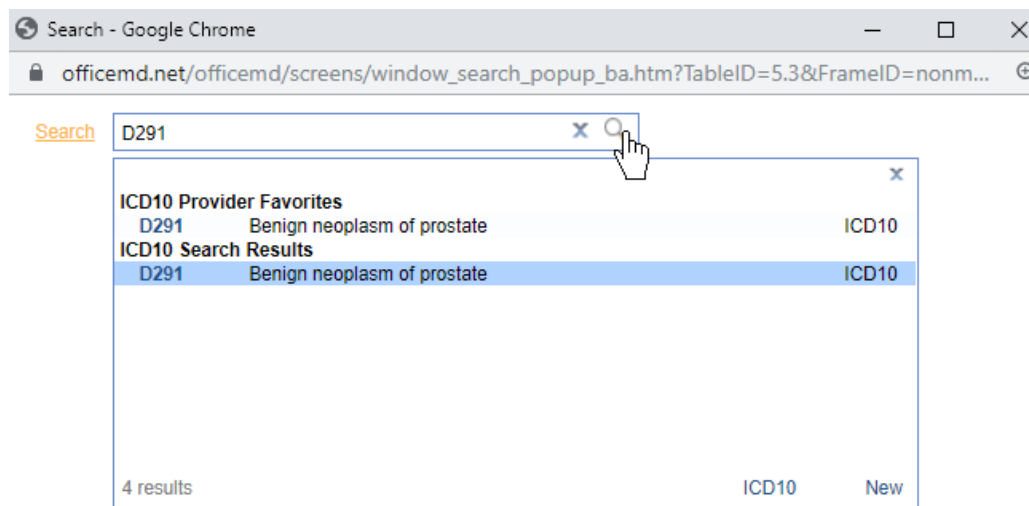
2. Add the problem to the **Charge Summary**. This can be done in many different ways.
 1. If you created the assessment on the problem today, the system should recommend that you add the Diagnosis to the Superbill for this patient.

Template Generated Superbill Items Add Selected Items ×				
	✓	Category	Code	Description
1	<input checked="" type="checkbox"/>	Diagnosis	D291	Benign neoplasm of prostate
2	<input checked="" type="checkbox"/>	Procedure	99211	OFFICE/OP VISIT, EST PT, NOT REQUIRING MD PRESENCE, TYPICALLY 5 ...

2. You can manually select the diagnosis from the **Problem List** bluebar that is automatically generated.

Problem List △	
Benign neoplasm of prostate (disorder)	D291
Benign prostatic hyperplasia (disorder)	N401
Diabetic renal disease (disorder)	E1121
Kidney stone (disorder)	N200
Bladder muscle dysfunction - overactive (disorder)	N3281
Top Provider Diagnosis Codes	
*Diagnosis Codes	
Bladder	
Epididymis	

3. You can search for the diagnosis in the **Lookup** bluebar.



3. Add other necessary details to the Superbill. Ensure the problem that you performed the Assessment on is listed in the **Charge Summary**. Save the Superbill.

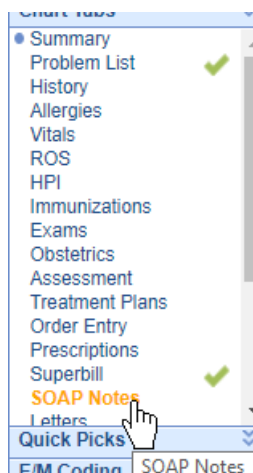
Charge Summary

☐ Edit Charges

	DOS	Code	Units	Charge	Amount	
Copy Delete	09/24/2019	99242	1	\$0.00	\$0.00	<input checked="" type="checkbox"/>
					Total =	\$0.00

Step 3: Create the Note

1. Select the **SOAP Note** chart tab



2. The note should auto-populate. If not, click **Re-Populate Note**.

PIN

(Base SOAP blank) (Base)

Re-Populate Note

3. You will notice the note that was added to the problem will show in the **Assessment** portion of the note by default.

Assessment

Diagnosis

- D291: Benign neoplasm of prostate (This patient will be seen in the office in 3 weeks to re-assess the condition. As of today's visit, the prostate cancer is well managed with hormone therapy. Some new bone pain was mentioned. Will be addressed with mild pain medication.)

Procedures

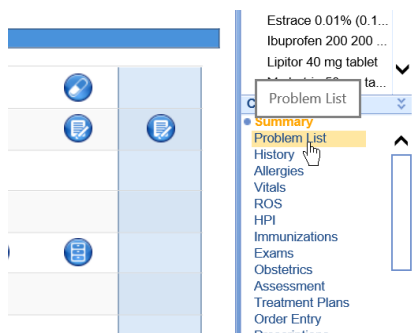
- 99242:OFFICE CONSULTATION, 3 KEY COMPONENTS:EXPAND PROB FOCUS HX;EXPAND PROB FOCUS EXAM;STRTFWD MED DECISN

Plan

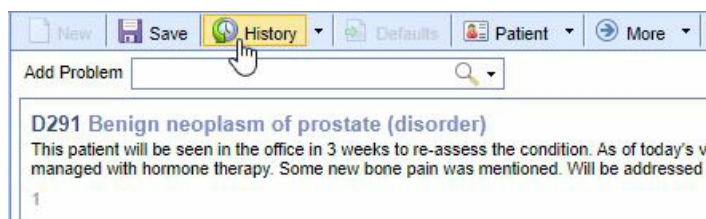
View the Problem List History

The **Problem List History** screen displays a patient's complete list of diagnoses regardless of their status (Active, Inactive, Removed or Resolved). Follow these steps to view the Problem List History:

1. Once in a patient's chart, select the **Problem List** chart tab.



2. Click on the **History** button on the EMR Toolbar.



3. Click on a problem to open the Edit Problem screen.

New	Save	Details	Copy	Patient	More
History					
Alert	Status	Code	Description	Onset	Modi
	Active	D291	Benign neoplasm of prostate (...)	06/18/2017	09/24/2019
	Active	N401	Benign prostatic hyperplasia (...)	08/22/2018	08/22/2018