

Problem Notes

Last Modified on 09/03/2026 10:36 am EDT

Notes let you keep the clinical context with each problem. You can add a note with rich text formatting when you create or edit a problem, review a problem's earlier notes, and copy a previous note forward so you don't have to retype it. Depending on the customization of your SOAP/Progress Note templates, this note will display along with the diagnosis list.



Show or hide notes on the list

Use the **Notes** switch above the problem list to show or hide notes on the cards. When it's on, each problem card shows its **most recent note** at the bottom, along with who wrote it and when.

Notes are hidden automatically while you **reorder** the list, to keep the cards compact. They return when you finish reordering.

Add a note

You add or update a note from the Add Problem or Edit Problem window:

1. Open a problem (or start adding one).
2. Type your note in the **Note** box on the right side of the window.
3. Click **Save**.

Review earlier notes

When you edit a problem, the window lists the problem's existing notes beside the note box. Each entry shows the note text along with who entered it and when, so you can see how the problem has been documented over time.

Copy a note forward

To reuse an earlier note, click the **copy** icon on that note. Its text is copied into the note box so you can keep it as-is or adjust it before saving. Use the **edit** icon to change an existing note.
