Problem List (BETA)

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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

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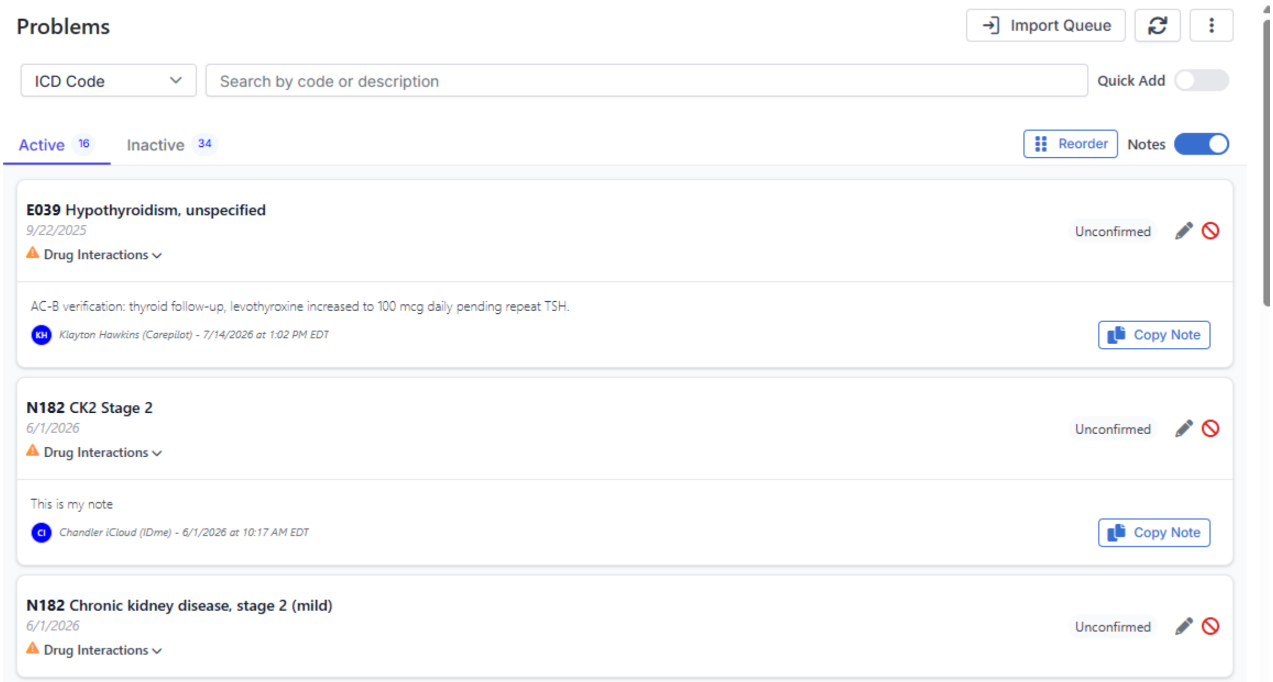
The **Problems** chart tab is where you review and manage a patient's problem list. The redesigned screen shows each problem as an easy-to-read card, keeps the most recent note in view, flags drug–disease interactions, and lets you add, edit, reorder, and deactivate problems quickly.

> **Where to find it:** Open a patient's chart and select the **Problems** tab.



Screen layout

The screen has three main areas:

- **Header bar** — the screen title (**Problems**), the **Import Queue** button, a **Refresh** button, and a **More** (⋮) menu.
- **Search bar** — a search-type selector, the problem search box, and the **Quick Add** switch.
- **Problem list** — the **Active** and **Inactive** tabs, the **Reorder** and **Notes** controls, and the problem cards

themselves.

Active and Inactive tabs

Problems are split across two tabs, each showing a count of how many it contains (for example, 4):

- **Active** — the patient's current problems (including those marked as a Recurrence or Relapse).
- **Inactive** — problems that are no longer current (Inactive, Resolved, Removed, or in Remission).

Reading a problem card

Each card shows the key information for one problem:

- **Code** — the problem's ICD code, shown before the description. An expired code is highlighted.
- **Description** — the problem name.
- **Date** — when the problem was added. Problems added today are highlighted and show the time.
- **Verification badge** — the current verification status (see below).
- **Drug Interactions** — when a problem interacts with the patient's medications, a warning appears; click **Drug Interactions** to expand the list of medications involved.
- **Most recent note** — when **Notes** are turned on, the latest note appears at the bottom of the card, with who wrote it and when.
    - Notes now support rich text formatting for improved readability.

Non-codified problems: A problem without a recognized code is marked with a warning icon. The system **cannot check drug–disease interactions** for non-codified problems, so review medications, allergies, and problems carefully to avoid patient safety risks.

Verification badges

The badge on each card shows how the problem has been verified. This information is present within interoperability data such as FHIR & CCDAs as required by the ONC.

Confirmed Unconfirmed Provisional Differential Refuted Entered-in-Error

What you can do from this screen

- **Add a problem** — search for a code and add it, either through the full window or with Quick Add. See Add a Problem.
- **Edit a problem** — click an active card to open it. See Edit a Problem.
- **Deactivate or reactivate** — move a problem between the Active and Inactive lists. See Deactivate & Reactivate a Problem.
- **Reorder** — drag problems into the order you want on the Active tab.
- **Add notes** — keep clinical notes with each problem and copy a prior note forward. See Problem Notes.
- **Manage favorites** — star the codes you use most for fast reuse. See User Favorites.
- **Import Queue** — review problems queued from elsewhere in the chart. See Import Queue.

Header buttons

- **Import Queue** — opens the queue of problems waiting to be reviewed. A red badge shows how many are

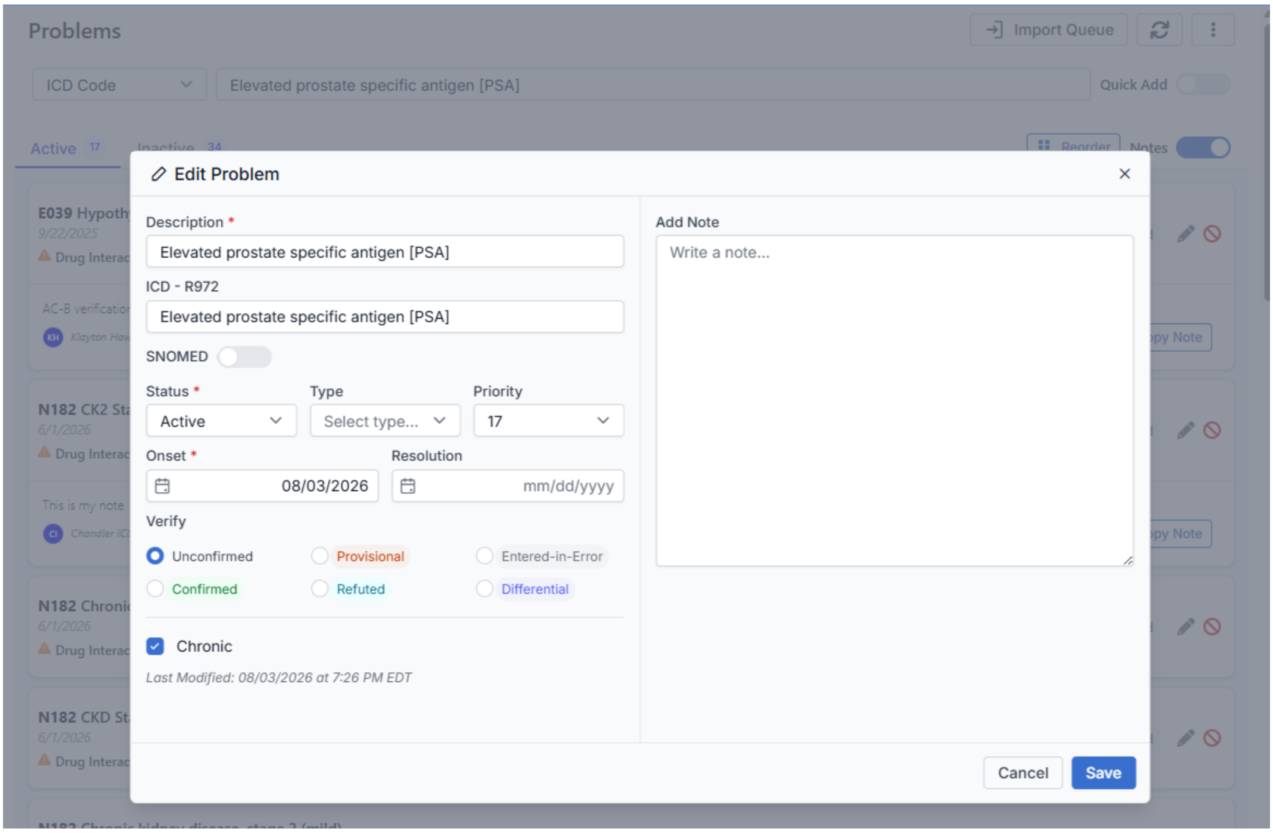
waiting.
- **Refresh** — reloads the patient's problems from the server.
- **More** (⋮) menu:
    - **Audit Log** — opens a detailed history of changes to the patient's problems.
    - **Print** — generates a printable problem list report.

> **Reorder and Notes:** The **Reorder** button and **Notes** switch sit to the right of the tabs. Reordering is available on the Active tab only, and notes are hidden automatically while you reorder.

Add a Problem

Add a Problem

You add a problem by searching for it and then either filling in the details or letting **Quick Add** add it instantly. This article covers searching, the two ways to add, and every field in the Add Problem window.



Step 1 — Choose how to search

Use the selector to the left of the search box to choose how you want to look up the problem:

- **ICD Code** — search by ICD code or description. This is the default value and expected to be used the most heavily.
- **SNOMED (partial)** — search SNOMED terms that match part of what you type.

- **SNOMED (full)** — search the full SNOMED term.

Step 2 — Search for the problem

1. Click in the **Search by code or description** box.
2. Begin typing a code or description. Matching results appear as you type, and more load as you scroll.
3. Your **favorites** appear first, marked with a star, so common problems are easy to grab. See User Favorites.
4. Click the result you want.

> **No match?** If nothing matches your search, you can choose **Add as a non-codified problem** to record it without a code. Because it has no code, the system can't check for drug–disease interactions — review the patient's medications and allergies carefully.

> **Already on the list:** If you pick a problem the patient already has, a message lets you know it has already been added and no duplicate is created.

Step 3 — Add the problem

What happens after you select a result depends on the **Quick Add** switch:

- **Quick Add off** — the **Add Problem** window opens so you can review and complete the details before saving.
- **Quick Add on** — the problem is added to the bottom of the Active list immediately, and a confirmation message appears.

> **Quick Add:** The **Quick Add** switch is on the right side of the search bar. Turn it on when you're adding several problems or do not need to set the details each time; turn it off when you want to review & add detail to each new problem.

The Add Problem window

When the window opens, you can set the following. Required fields are marked with an asterisk (*).

Field	Description
Description *	The problem name. You can edit it — for example, to word it in your own way.
ICD	The ICD code. You can search here to attach or change the code.
Select ICD Code *	Appears when a SNOMED term maps to more than one ICD code, so you can pick the correct one.
SNOMED	Turn on the SNOMED switch to search for and attach a SNOMED term.
Status *	The problem's status (for example, Active, Inactive, Resolved).
Type	An optional classification: Cognitive, Functional, or SDOH (Social Determinants of Health).
Onset *	The date the problem began. Defaults to today when adding.
Resolution	The date the problem resolved (available when editing).
Verify	The verification status (see below).
Chronic	Check this if the problem is chronic.
Note	An optional note. See Problem Notes.

Verify options

Unconfirmed Provisional Entered-in-Error Confirmed Refuted Differential

New problems start as **Unconfirmed** until you choose another status.

Save your own wording for a code

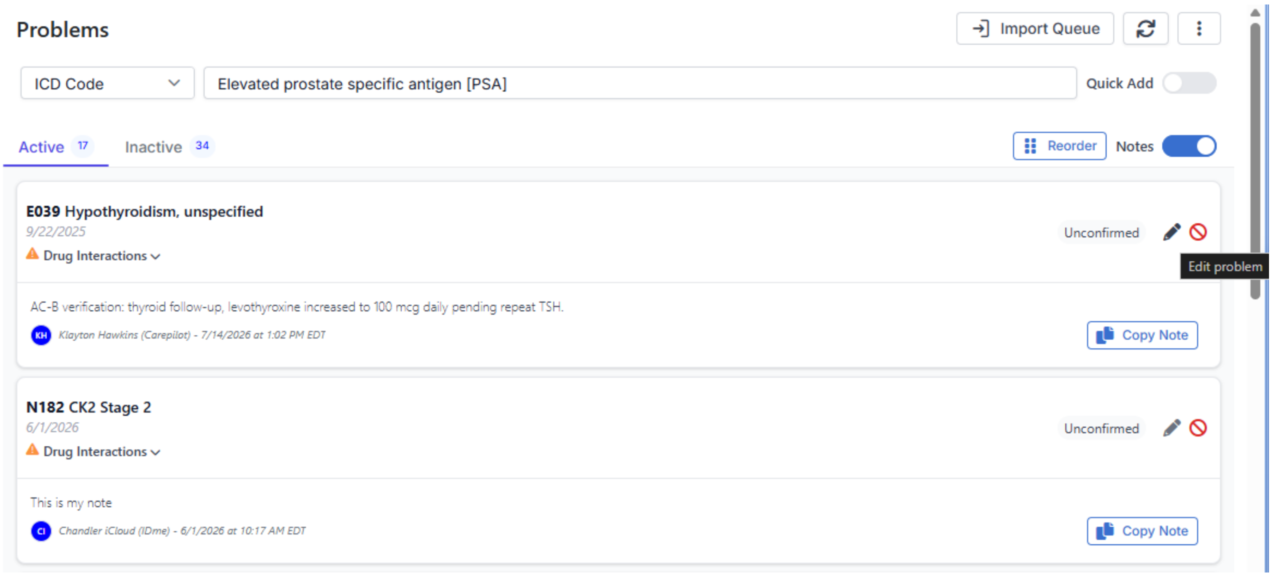
If you change the description so it differs from the standard wording for the code, an option appears: *Default your description for code [code] to "…"?* Check it to make your wording the default the next time that code is used.

Step 4 — Save

Click **Save** to add the problem, or **Cancel** to close without saving. Save is available once the required fields — Description, Status, and Onset — are filled in.

Edit a Problem

You can update any active problem on the patient's list. This article covers opening a problem, changing its details, and reordering the list.



Open a problem for editing

On the **Active** tab, you can open the Edit Problem window in two ways:

- Click anywhere on the problem card.
- Click the **pencil** icon on the card.

Editing is available for active problems. Inactive problems are read-only until you reactivate them — see

Deactivate & Reactivate a Problem.

What you can change

The Edit Problem window has the same fields as when adding — Description, ICD, SNOMED, Status, Type, Onset, Resolution, Verify, Chronic, and Note. See *Add a Problem* for a full description of each field.

When editing, two extra details are available:

- **Resolution** date — set when the problem was resolved.
- **Last Modified** — shows the date and time the problem was last changed.

The window also lists the problem's existing notes, so you can review, edit, or copy a previous note forward. See *Problem Notes*.

Save your changes

Click **Save** to keep your changes, or **Cancel** to close without saving. A confirmation message appears when the problem is saved.

Reorder the problem list

To change the order in which problems appear on the Active tab:

1. Click **Reorder** (above the list, to the right).
2. Drag each problem by its handle into the order you want. Notes are hidden while you reorder to keep the cards compact.
3. Click **Done** to save the new order.

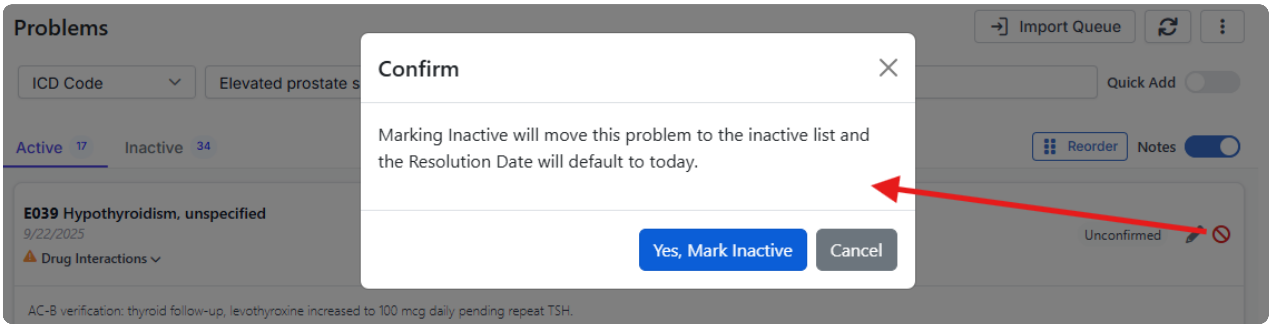
Reordering is available on the **Active** tab only. Your new order is saved automatically when you click Done.

Deactivate and Reactivate a Problem

Problems move between the **Active** and **Inactive** tabs rather than being deleted, so the patient's history stays intact. This article explains how to deactivate a current problem and how to bring an inactive problem back.

Deactivate a problem

Deactivating moves a problem from the Active tab to the Inactive tab.



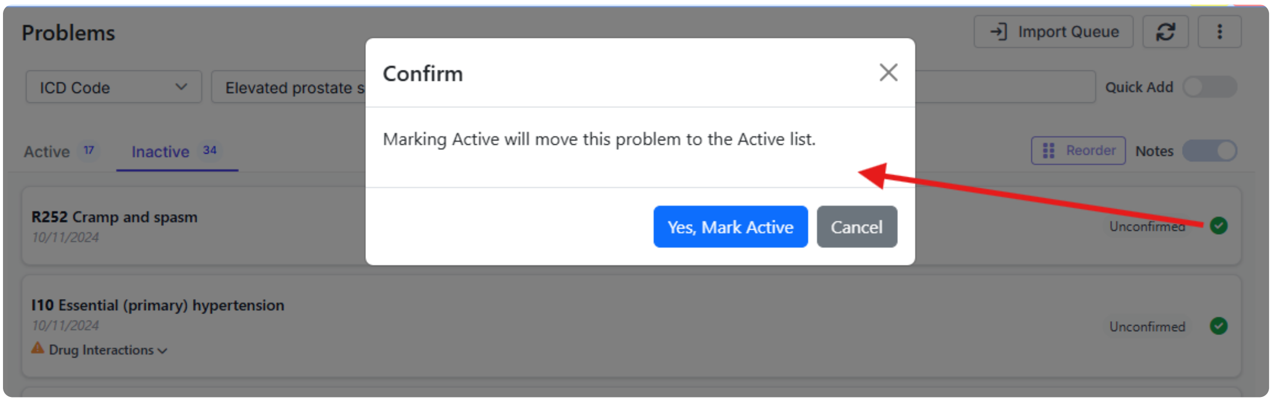
1. On the **Active** tab, find the problem you want to deactivate.
2. Use the problem's **deactivate** action.
3. Confirm when prompted.

When you deactivate a problem, its **Resolution** date is automatically set to today and its status is updated so it no longer appears as current. The problem then shows on the **Inactive** tab.

A problem is considered **inactive** when its status is Inactive, Resolved, Removed, or Remission. You can also change the status directly from the Edit Problem window — see Edit a Problem.

Reactivate a problem

Reactivating moves a problem from the Inactive tab back to the Active tab.



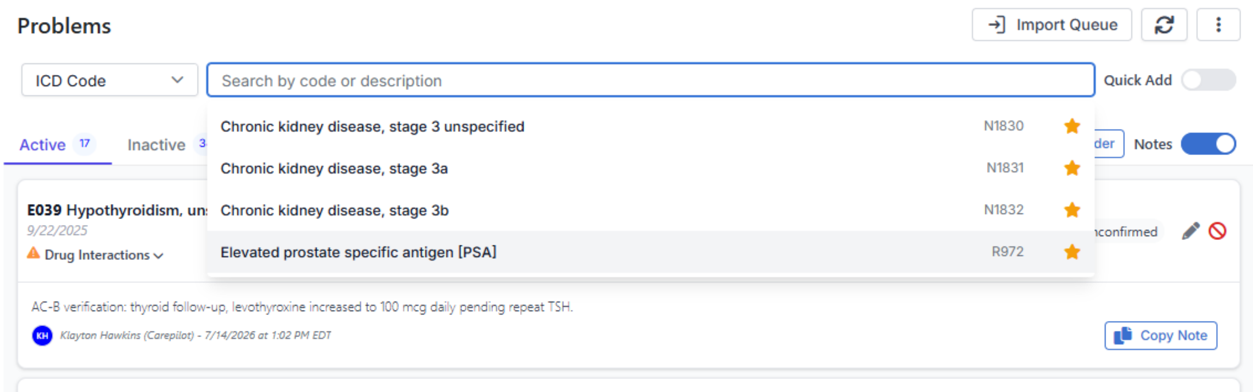
1. Select the **Inactive** tab.
2. Find the problem you want to bring back.
3. Use the problem's **reactivate** action.
4. Confirm when prompted.

The problem returns to the Active tab. You can then open it to adjust its status, onset, or other details if needed.

Adding an existing problem again: If you search for and add a problem the patient already has on the Inactive tab, the system recognizes it and reactivates the existing entry instead of creating a duplicate. See Add a Problem.

User Favorites for Problem List

Favorites let you keep the codes you use most at your fingertips. When you search to add a problem, your favorites are listed first, so common problems are one click away.



How favorites appear

When you open the problem search, your favorite codes are shown before any other results and are marked with a **star**. As you type, favorites that match stay sorted to the top of the results. See Add a Problem for the full search steps.

Add a favorite

1. Start a problem search and find the code you want.
2. Click the **star** icon next to that result.
3. The star fills in to show the code is now a favorite.

Remove a favorite

1. Find the code in the search results (favorites appear at the top).
2. Click the filled **star** icon to remove it from your favorites.

Favorites are tied to **your** account, so each staff member keeps their own list. Adding or removing a favorite does not change any problem already on a patient's chart.

Problem Notes

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

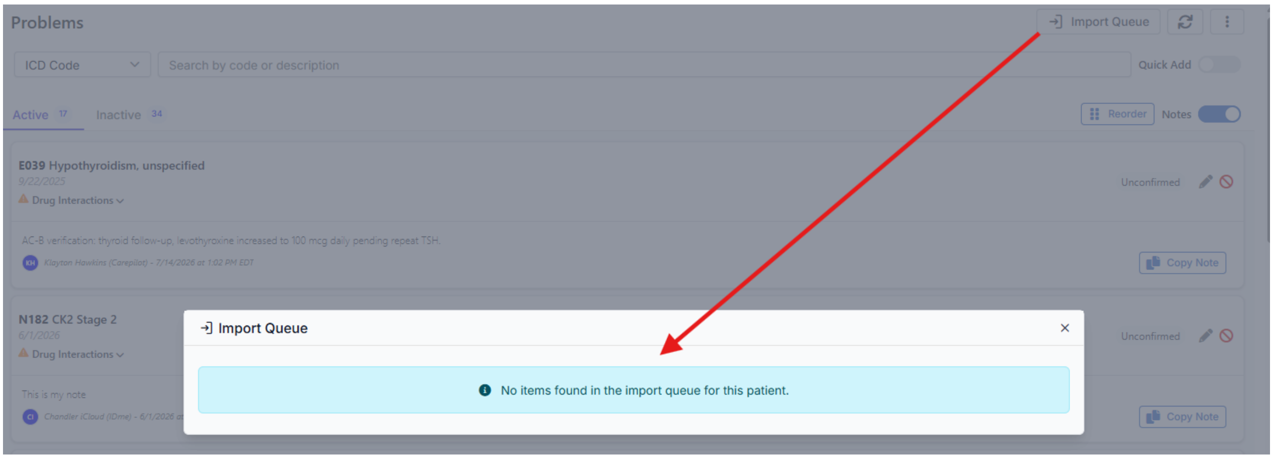
When you edit a problem, the window lists the problem's existing notes beside the note box. Each entry shows the note text along with who entered it and when, so you can see how the problem has been documented over time.

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.

Problem Import Queue

Problems can be sent to the problem list from other parts of the chart. The primary source for these items are selections made within encounter templates that are pushing a ***Template Action.*** Those problems wait in the **Import Queue** until you review them and decide which to add.



Opening the Import Queue

The **Import Queue** button is in the header bar at the top of the Problems screen. When items are waiting, a red badge shows how many. Click the button to open the queue.

> When there are problems waiting to be reviewed, the Import Queue opens **automatically** the first time you open the Problems screen.

Reviewing queued problems

The queue lists each waiting problem with:

- **Description** — the problem name.
- **Location** — where in the chart the problem came from.
- **Created** — when it was added to the queue.

Adding or removing problems

- Check the problems you want, then use **Add All** to bring the selected problems onto the list.

- Use **Remove All** to clear the selected problems from the queue without adding them.
- Click **OK** to apply your choices, or **Cancel** to close without changes.