

Problem-Oriented Charting in Notes

Ambulatory Providers

Introduction

Problem-oriented charting can now be done from the body of your note without having to open the problem list or disrupt your note workflow.

Problem-oriented charting allows you to document an assessment and plan note (A&P note) for each visit diagnosis during an outpatient visit. These A&P notes are saved within the associated problem on the problem list so clinicians can view the history of the problem. Problem oriented charting can help improve quality improvement initiatives and care coordination as well as streamline documentation.



Note: If you mark your note as sensitive, A&P notes are not filed to the problem list. The problem list provides all members of the care team with a shared view of information and no problems or pieces of information can be individually marked as sensitive. Therefore, when you create A&P documentation in a note marked as sensitive, that documentation appears only in that note.

A&P Notes: Diabetes mellitus, type 2

Kluck, Document (519856)

Office Visit (10/20/2023)

Noriega, Alberto (10/20/2023 2:40 PM)

Diabetes is well controlled.
Current treatment plan is effective, no change in therapy, lab results and schedule of future lab studies reviewed with patient.

Office Visit (7/28/2022)

Noriega, Alberto (10/20/2023 2:35 PM)

Current treatment plan is effective, no change in therapy, lab results and schedule of future lab studies reviewed with patient, orders and follow up as documented in the chart.

Office Visit (5/25/2022)

Noriega, Alberto (10/20/2023 2:34 PM)

Current treatment plan is effective, no change in therapy, lab results and schedule of future lab studies reviewed with patient, orders and follow up as documented in the chart.

Office Visit (2/24/2021)

Kemp, Kim, MD (10/20/2023 2:31 PM)

Under fair control.
During the course of the visit the patient was education and counseled about appropriate screening and preventive services including:
Glaucoma screening

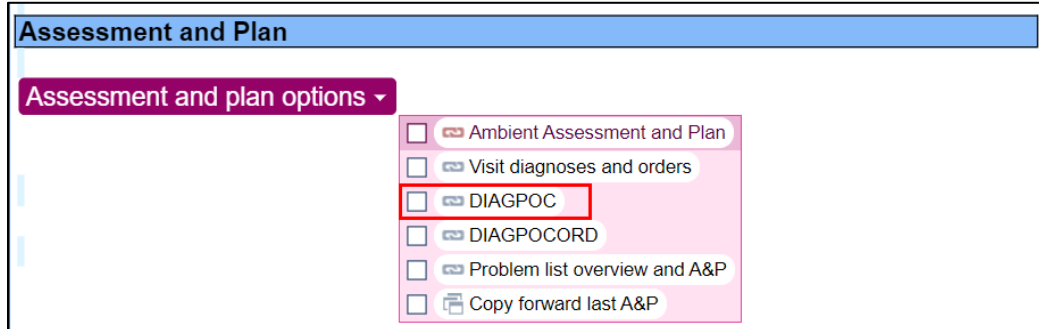
Patient Instructions (the written plan) was given to the patient.

Create A&P Note in Your Progress Note

1. Click **Create Note**

Use the note template speed buttons or department specific note template.

2. In the Assessment and Plan section of your note, select **DIAGPOC** from the SmartList



This SmartLink includes all encounter visit diagnoses.

Alternately, a provider can use **.DIAGPOC** in any note to link A&P Notes to their patients problem list. You can also use **.DIAGPOCORD** to link A&P Notes and associated orders placed in the visit.



Note: Visit diagnoses must be entered to use the SmartLink. Visit diagnosis can be added from the Problem List by clicking on the green plus sign.

3. Under each diagnosis in the note, document your A&P



Efficiency Tip:

If the visit diagnosis is linked to a problem on the problem list, the A&P written in the progress note can be seen in the problem list.

If you add any of the visit diagnoses to the problem list during this visit, the A&P you documented is automatically linked to the new problem.

4. To rearrange the order of diagnoses in the note, drag and drop the diagnosis to its new location.



Note: Rearranging the order of the diagnoses in your note will also change the listed order in the Visit Diagnosis section and taskbar after you sign or pend the note.

Manage Visit Diagnosis

All visit diagnoses from the current encounter are pulled into the Diagnosis-Aware Note automatically, but you can remove any diagnosis from your note. You can also add and remove visit diagnoses for the encounter directly from your note.

5. Click on the pencil icon to Delete Visit Diagnosis or Remove from note

- **Delete Visit Diagnosis:** Delete the diagnosis from the patients Visit Diagnoses.
- **Remove from note:** Remove the documentation section from the note.

Assessment and Plan

{Tip | You can now make changes to the problem list right from your note! Change your assessment and plan, add/remove problems, and more. Click [HERE](#) to view the tip sheet. This will disappear:38921}

⌵

◆ **Type 1 diabetes mellitus without complication (CMS code)**

◆ **Hypertension associated with type 1 diabetes mellitus (CMS code)**

Diagnoses ▾

Delete Visit Diagnosis

Remove from Note

6. Click **Diagnoses**

Assessment and Plan

{Tip | You can now make changes to the problem list right from your note! Change your assessment and plan, add/remove problems, and more. Click [HERE](#) to view the tip sheet. This will disappear:38921}

⌵

◆ **Type 1 diabetes mellitus without complication (CMS code)**

Diabetes is controlled with medication. Motoring blood sugar regularly at home. Current treatment plan is eff

◆ **Hypertension associated with type 1 diabetes mellitus (CMS code)**

Hypertension is unchanged. Continue dietary sodium restrictions. Continue current medications. Reassess b

Diagnoses ▾

Include in Note

☒ Type 1 diabetes mellitus without complication (CMS code)

☒ Hypertension associated with type 1 diabetes mellitus (CMS code)

+ Add Visit Diagnosis

Add a new visit diagnosis to the Visit Diagnoses

7. Clear the checkbox for any diagnoses that you don't want to include in the note.

8. To add a new visit diagnosis for the encounter, select **Add Visit Diagnosis**.

The Diagnoses Search window opens.

9. In **Search for diagnosis** field, type diagnosis and press **Enter**

10. Select diagnosis in the *Diagnoses* box or select **Broaden My Search** for additional options

11. Click **Select And Stay** or **Accept**

- **Select And Stay:** Select current visit diagnosis and search for additional visit diagnosis
- **Accept:** Select current visit diagnosis

Diagnoses Search - ZZTEST,AMANDA

headaches

Browse **Preference List** Database

Diagnoses	ICD-10-CM	Preference List
Chronic tension headache (aka HEADACHES)	G44.229	UCSF PRIMARY CARE DIAGNOSES
Frequent headaches	R51.9	UCSF PRIMARY CARE DIAGNOSES

[Broaden My Search](#)

Select And Stay [Accept](#) [Cancel](#)

The recently added diagnosis will appear in the list of diagnosis so that you can write an A&P note.

Review A&Ps for a Problem

See a history of the A&Ps for a problem in the problem list:

1. Open Problem List activity and expand the problem to review.
2. Click the View All Notes button to open a report with A&Ps written in chronological order.

Problem List ¹

[Care Coordination Note](#)

Search for problem [Add](#) [DxReference](#)

Show: ☐ Past Problems [View Drug-Disease Interactions](#)

Diagnosis	Notes	Hospital	Principal	Priority	Change Dx	Resolved
Hospital (Problems being addressed during this admission)						
Community acquired pneumonia	Edit Overview	☒	☒	High	Change Dx	Resolved
Details Chronic: ☒ SNOMED CT: Community acquired pneumonia Code: J18.9 Noted: 11/17/2023 Share w/ Pt: ☐ Updated: Today Kluck, Mr Physi...						
Present on Admission?: Yes No ?						
Overview Written: Noriega, Alberto 1/4/2024 10:16 AM Signs and symptoms consistent with CAP. CXR reveals RLL consolidation. Will give broad spectrum abx, O2, and have social services evaluate.						
My Last Assessment & Plan Note ²						
Complications Procedure Admission						
Related Goals View Past Values Search for goal Add Associate Goals Show: ☐ Unrelated Goals						
No goals related to this problem						
Relevant Medications No medications related to this problem						
Essential hypertension Create Overview Med Change Dx Resolved						
Mark as Reviewed Last Reviewed by Noriega, Alberto on 11/17/2023 at 9:31 PM						