Ambulatory Problem List: Problem-Based Charting

This tip sheet is for providers who are interested in creating and maintaining problem-based treatment plans for patients within the Problem List in EPIC. With EPIC v.2014 dual and triple pane views, this type of charting has become more efficient and the ability to review problem-specific notes is very helpful.

The Problem List contains information unique to the patient and it is shared among all providers who document in EPIC. The view of the Problem List, however, can be changed by individual providers through "sorting." This view will be unique to that provider and that provider will see that view until they decide to re-sort it. Another provider can “sort” the Problem List in a different way for their preferred view.

**Step 1: Sorting the Problem List**

If you are a specialist, you should be able to “sort” by specialty. Note: screenshot below shows that you can sort by “Endocrine” by clicking on the Options button and then selecting Endocrine. If you are a primary care doctor, this is not an option.

![Sort by Class](image)

Sorting by Class will show you problems marked as Acute, Chronic or Other. Sorting by Priority will show you problems that have been marked High, Medium or Low priority. In v.2014, we introduced the ability to sort by body system as is seen in the screenshot above.

**Step 2: Documenting Assessment and Plan by Problem**

The benefit of documenting assessment and treatment plans in the Problem List is that the information can easily be retrieved. If used by all providers, this could save significant time in reviewing charts for information relevant to a particular problem. Documentation should be done by opening the Problem List and selecting a specific diagnoses. Click on Current Assessment and Plan Note to open it. One can copy forward a previous note on this problem or free text an A/P note. Then, select the next problem and document a separate note. See screenshots below.

![Current Assessment & Plan Note](image)

![Last Assessment & Plan Note](image)
Step 3: Populating the Visit Note

There are two ways to get the Current Assessment and Plan note into your Visit Note for that day. If using Notewriter, then the smartlink, “Problem list A/P notes documented today,” can be used. See screenshot.

If not using a Notewriter APSO note, then type “.probvisit” and all of the Current and Assessment Plan notes for that encounter will be brought over into your note. See screenshot below which shows the appearance of the Current Assessment and Plan Notes brought over using either the smartlink or the smartphrase.

-----------------------------------------------------------------------------------------------------------------------------

Step 4: Chart Review with Problem-based Charting

To review prior notes on this particular problem for this patient, you can click on the problem in Snapshot Problem List or select “View All Notes” under a specific problem in the encounter Problem List. You will see a reverse chronologic list of all treatment plans for that problem specifically (see next page screenshot).
Screenshot of one-click chart review capability with problem-based charting:

It should be noted that notes from other providers will co-exist with your notes so the progression of the treatment plan for a given problem is clear to all providers caring for that patient.