Set Up Form Routing Rules

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Office Practicum

Path: Main Menu > Admin Tools Menu > Form Builder

About

Routing Rules can be set up for Forms so that the Form requires signatures from specific people or teams. Once the first user within a step signs the Form, the routing will continue until the Form passes to all users who are required to sign. For multi-user Case Roles, you can enable functionality to allow for a single user's signature to fulfill the Routing Rule for the entire Case Role (Example: Nursing Team contains person A, person B, person C and person C signs the Form, the Routing Rule has been fulfilled for the Nursing Team). Contact NSS Support and reference setup variable: *MultiUserCaseRoleFormRouting* to enable this functionality.

Set Up Form Routing Rules

- 1. Navigate to the Form Builder by following the path above.
- 2. Choose a Form from the **SELECT FORM** drop-down.
- 3. Click the Edit This Form button.

Add New Form	Add New Field	Edit This Form	Main Menu	Edit Selected Field
	Discontinue This Form	Discontinue Selected	Add a PDF Print	
		Fields	Template	

4. Click the Setup Routing Rules button.

Update	Duplicate Form	Cancel
Programs using this Form	Setup Routing Rules	Locations using this Form

- 5. Click the Add button 💠 .
- 6. In the Step field, type a number or use the up and down arrows to select a number.
- 7. In the Requires Signature By drop-down, select a Role.

Note: If *MultiUserCaseRoleFormRouting* is enabled and you select one of the Team Case Roles for sign-off, only one person from the team will need to sign to fulfill that Routing Rule.

- 8. (Optional) In the Rule Description field, enter a description of the rule.
- 9. Click the Add button 💠 to add other Form routing rules as necessary.
- 10. Click the Save Changes button.

Form Routing Rules					
+	Step	Requires Signature By	Rules Description		
-	2	Psychiatrist			
-	1	Primary Therapist			
Preview Changes Save Changes Cancel Changes					
Note [.] To	remove a sten	click the Remove button If you removed the	e step in error click the Recover button		



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