Set Up Form Routing Rules

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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.
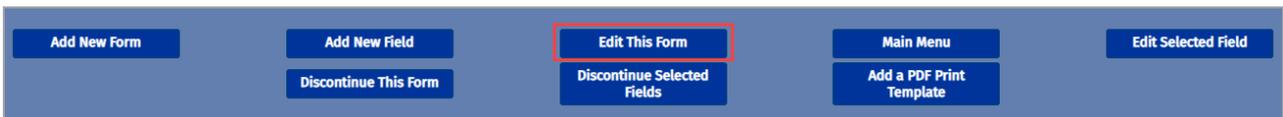
4. Click the **Setup Routing Rules** button.

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.

> 📌 **Note**: To remove a step, click the **Remove** button 🟥 . If you removed the step in error, click the **Recover** button ↩ .