Set Up Treatment Plan Routing Rules

Last Modified on 03/10/2022 4:29 pm EST

Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > PCP (ITP) Section

About

Treatment Plan Routing Rules can be configured by your Agency via the PCP (or ITP) Section in System Setup (Supplemental). Creating a Routing Rule allows your Agency to define the sequence of Case Assignment signatures on the Treatment Plan.

Add a Treatment Plan Routing Rule

1. Navigate to PCP (or ITP) Section, following the path above.
2. Click the **New** button to add a new Rule Step.

PCP Routing Rules Setup			
New	Case Role	Rule Step	Description
Delete	Primary Practitioner	1	Prim Clin
Delete	Secondary Provider	1	Sec Clin
Delete	Plan Supervisor	2	

3. Select an option from the **Case Role** drop-down.
4. In the **Rule Step** column, identify the order in which you want this particular person to sign off.
5. In the **Description** column, add a note to describe the rule.
6. Repeat the steps above, to define more rules as needed.
7. Click **Save Changes**.

Remove a Treatment Plan Routing Rule

1. Navigate to PCP (or ITP) Section, following the path above.
2. Next to the Case Role Rule Step you'd like to remove, click the **Delete** button.

PCP Routing Rules Setup			
New	Case Role	Rule Step	Description
Delete	Primary Practitioner	1	Prim Clin
Delete	Secondary Provider	1	Sec Clin
Delete	Plan Supervisor	2	

Note: If you clicked the Delete button in error, simply click the **Recover** button to restore the row.

3. Click **Save Changes**.