

Treatment Plan Template: Customize Treatment Plan Builder Fields

Last Modified on 09/20/2022 10:19 am EDT

Path: Main Menu > Admin Tools Menu > Treatment Plan Template and Program Setup

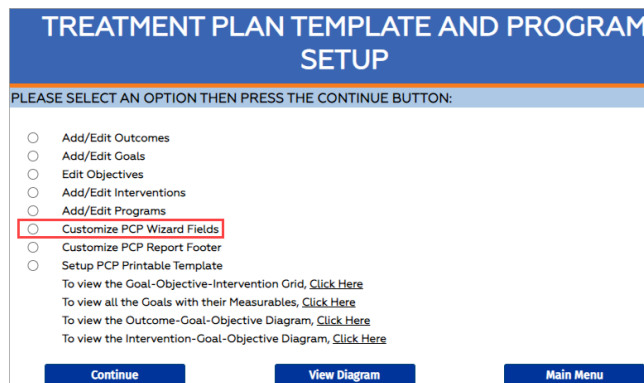
About

In Treatment Plan Template Setup, you can add custom fields to Step 1 and Step 4 of the Individualized Treatment Plan (ITP) Builder.

- [Add New Custom Treatment Plan Builder Field](#)
- [Edit Custom Treatment Plan Builder Fields](#)
- [Order Fields](#)

Add New Custom Treatment Plan Builder Field

1. Navigate to Treatment Plan Template and Program Setup by following the path above.
2. Select the **Customize PCP Wizard Fields** radio button.



TREATMENT PLAN TEMPLATE AND PROGRAM SETUP

PLEASE SELECT AN OPTION THEN PRESS THE CONTINUE BUTTON:

- Add/Edit Outcomes
- Add/Edit Goals
- Edit Objectives
- Add/Edit Interventions
- Add/Edit Programs
- Customize PCP Wizard Fields**
- Customize PCP Report Footer
- Setup PCP Printable Template

To view the Goal-Objective-Intervention Grid, [Click Here](#)
To view all the Goals with their Measurables, [Click Here](#)
To view the Outcome-Goal-Objective Diagram, [Click Here](#)
To view the Intervention-Goal-Objective Diagram, [Click Here](#)


[Continue](#) [View Diagram](#) [Main Menu](#)

3. Click the **Continue** button.
4. Click the **Add New Field** button.
5. In the window:
 - a. Enter a **Field Name**.
 - b. *(Optional)* Enter a **Field Alias**.
 - c. Click the **Field Type** drop-down and select a Field Type. For more information on the available Field Types, click [here](#).
 - d. *(Optional)* If you'd like this field to populate information from another Form and field, click the **Referenced Form** and **Referenced Field** drop-down and select the Form and field.
 - e. The Wizard Step drop-down defaults to Step 1 of the ITP Builder. If you want the field to display on Step 4, click the **Wizard Step** drop-down and select 4.
 - f. *(Optional)* Click the **Required** drop-down and select Yes to make the field required.
 - g. *(Optional)* To display the information on all Steps as you move through the Treatment Plan, click the **Display on all Steps** drop-down and select Yes.
 - h. Click the **Save This Field** button.

Edit Custom Treatment Plan Builder Fields


1. Navigate to Treatment Plan Template and Program Setup: **Main Menu > Admin Tools Menu > Treatment Plan Template**

and Program Setup.

2. Select the **Customize PCP Wizard Fields** radio button.
3. Click the **Continue** button.
4. Click the **Edit** button  next to the field you want to edit.
5. Make edits as necessary.
6. Click the **Save This Field** button.

Order Fields

1. Navigate to Treatment Plan Template and Program Setup: **Main Menu > Admin Tools Menu > Treatment Plan Template and Program Setup.**
2. Select the **Customize PCP Wizard Fields** radio button.
3. Click the **Continue** button.
4. Click the **Up arrow** to move the field up the list or the **down arrow** to move the field to the bottom of the list.

NEXTSTEP								
Field Name	Field Alias	Field Type	Wizard Step (1 or 4)	Required	Group	Order	Display on all Steps	Edit / Remove
Strengths		memo	1	No	o		No	 
Safety and Health Issues		memo	1	No	o		No	 