Treatment Plan Template: Customize Treatment Plan Builder Fields

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

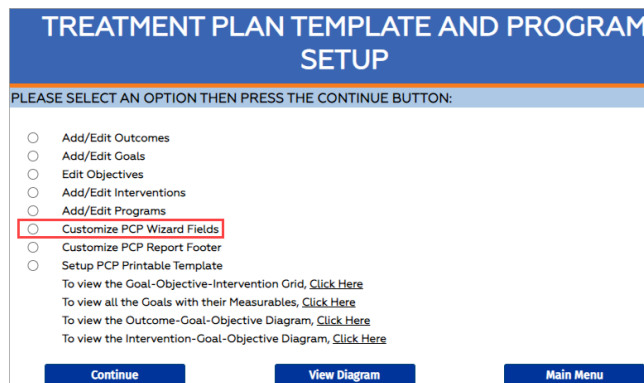> **Path: Main Menu > Admin Tools Menu > Treatment Plan Template and Program Setup**

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.

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	✎ ☒