

Workflow Designer

Purpose	Create, test, assign, publish, and maintain CAREWare workflows that guide users through defined pages and saved-record events.
Who should do this	CAREWare administrators, data managers, or designated support staff with Workflow Designer access.
Use this setup when	A repeatable process should start from a specific data entry point and through guided data entry result in a more complete record through confirmations, messages, or save controls.
Main warning	Build and test with a test provider/client and a limited user group before publication. A published workflow affects assigned users when its trigger occurs.
Video walkthrough	Workflow Designer Video

Quick path

Administrative Options > Custom Features > Workflow Designer

Before you begin

- Confirm the provider and environment where the workflow will be tested.
- Confirm the responsible user group has Edit Workflow Designs plus permission to open and save every page the workflow will use.
- Plan the trigger, page sequence, saved-record events, user messages, and the group that will test the workflow.
- Ensure all data elements for the workflow are active for the provider including subservices and funding sources for contracts, tests and medications in clinical setup, and any necessary permissions to access data entry fields relevant to complete the workflow.
- Use a test client or test record and keep the first assignment limited until the complete and resume paths are verified.

Important

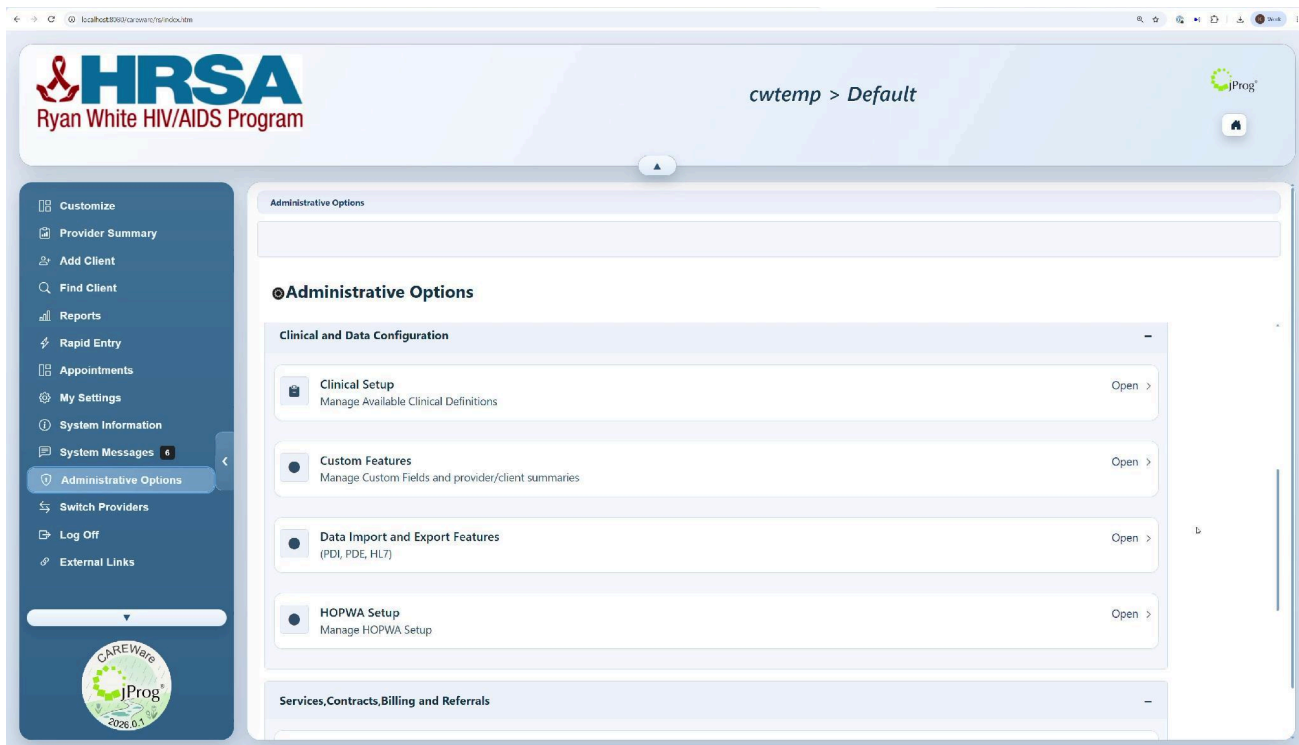
The RSR and ADR workflow guides use the same design pattern, however show basic steps for a workflow that results in a client counted for the RSR and ADR reports.

Open Workflow Designer and create a draft

Step 1. Click Administrative Options.

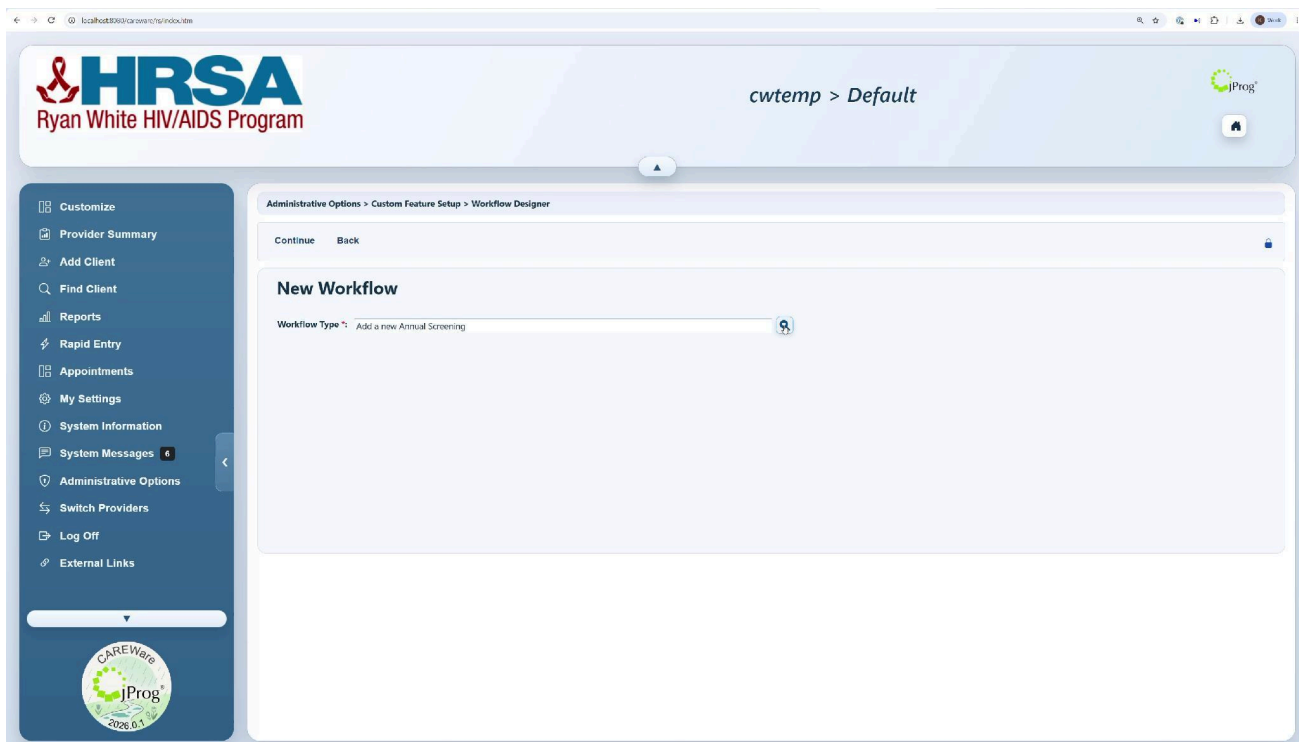
Step 2. Open Custom Features, then click Workflow Designer.

Step 3. Click Add New.



Step 4. Select the Workflow Type. The selected type determines the trigger shown on the canvas, then click Continue.

Step 5. Enter a clear Workflow Name that describes the trigger and purpose.

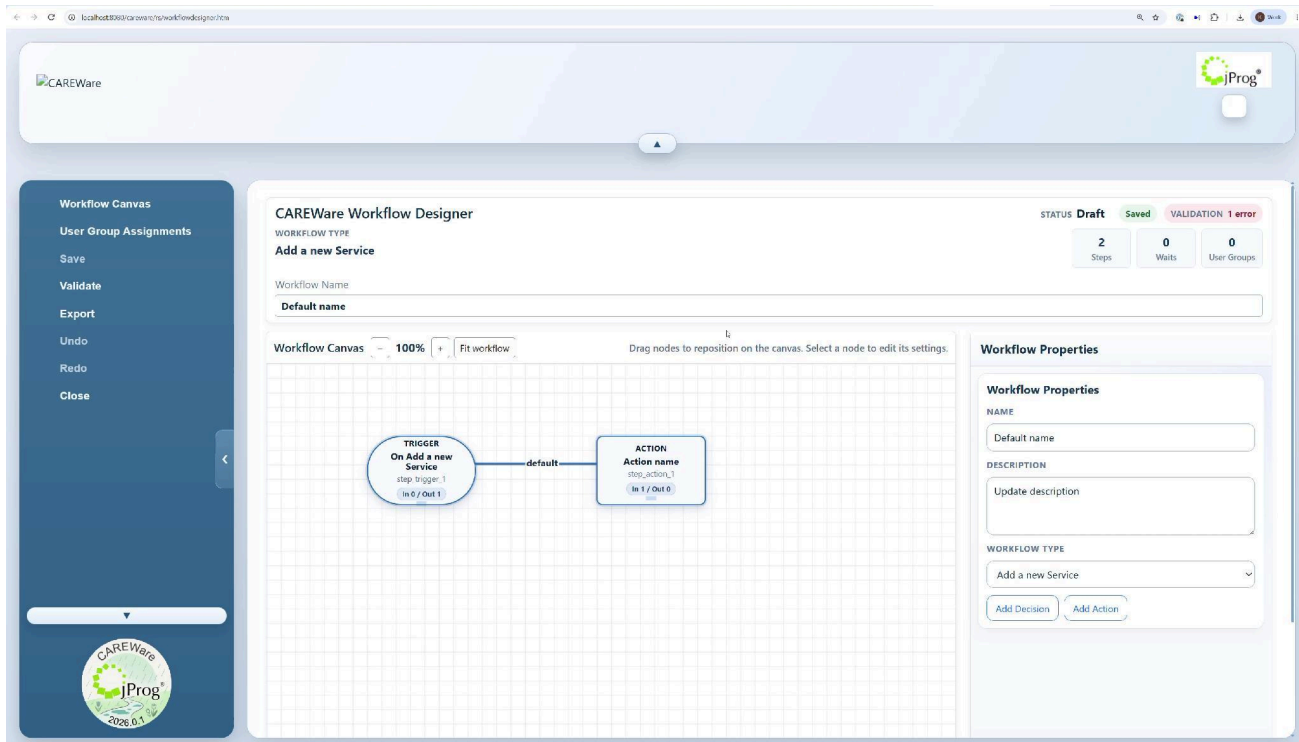


Tip

Use names that identify both the business process and trigger, such as “New Client - RSR Intake” or “Service Entry - Eligibility Check.” This makes the workflow list easier to maintain.

Understand the Workflow Canvas

The canvas begins with a trigger node. Select a node to edit its settings in the right panel. Use Add Action, Add Wait for User Input, or Add Decision where those buttons are available. Nodes can be repositioned on the canvas without changing the workflow logic.



Core step types

Step type	What it does	Typical use
Trigger	Starts the workflow when the selected workflow event occurs.	Finalize a new client; add a service; add an assessment or other available workflow event.
Action	Performs a configured workflow behavior.	Navigate, display a message, confirm before save, block save, message a user, or prefill eligibility.
Wait for User Input	Pauses until a configured record event occurs on a selected page.	Continue only after the user adds or updates the required record.

Step type	What it does	Typical use
Decision	Creates a branching point from a wait step where available.	Use when subsequent steps should depend on a condition or user path; test each branch.

Important

A page-opening action by itself does not wait for data entry. If the next step depends on the user saving a record, add Wait for User Input immediately after the Go to Page action.

Configure an Action

Step 6. Select an Action node. Enter a descriptive Step Name.

Step 7. Open Action Type and choose the behavior required for that point in the workflow.

Action configurations available

Action Type	Configuration / use
Block Save	Stops the current save action. Use only when the workflow must prevent a save until the intended condition is addressed.

Action Type	Configuration / use
Show Message	Displays workflow text to the user. Use for instructions, warnings, completion notices, or verification prompts.
Confirm Before Save	Displays a message and requires a confirmation before the save proceeds.
Send Message to User	Sends a workflow message to a user. Select the intended recipient/configuration presented by CAREWare and test delivery.
Prefill Eligibility as No	Prepopulates eligibility as No in the supported eligibility context. Verify the result is appropriate before using in production.
Go to Page	Navigates to a selected Target Page and Destination. Pair with Wait for User Input when a saved record should advance the workflow.

Warning

Do not use Block Save or prefilled values as substitutes for business rules or source documentation. Test the exact user role and page permissions before publication.

Go to Page and Wait for User Input

Step 8. For Action Type, select Go to Page.

Step 9. Select the Target Page.

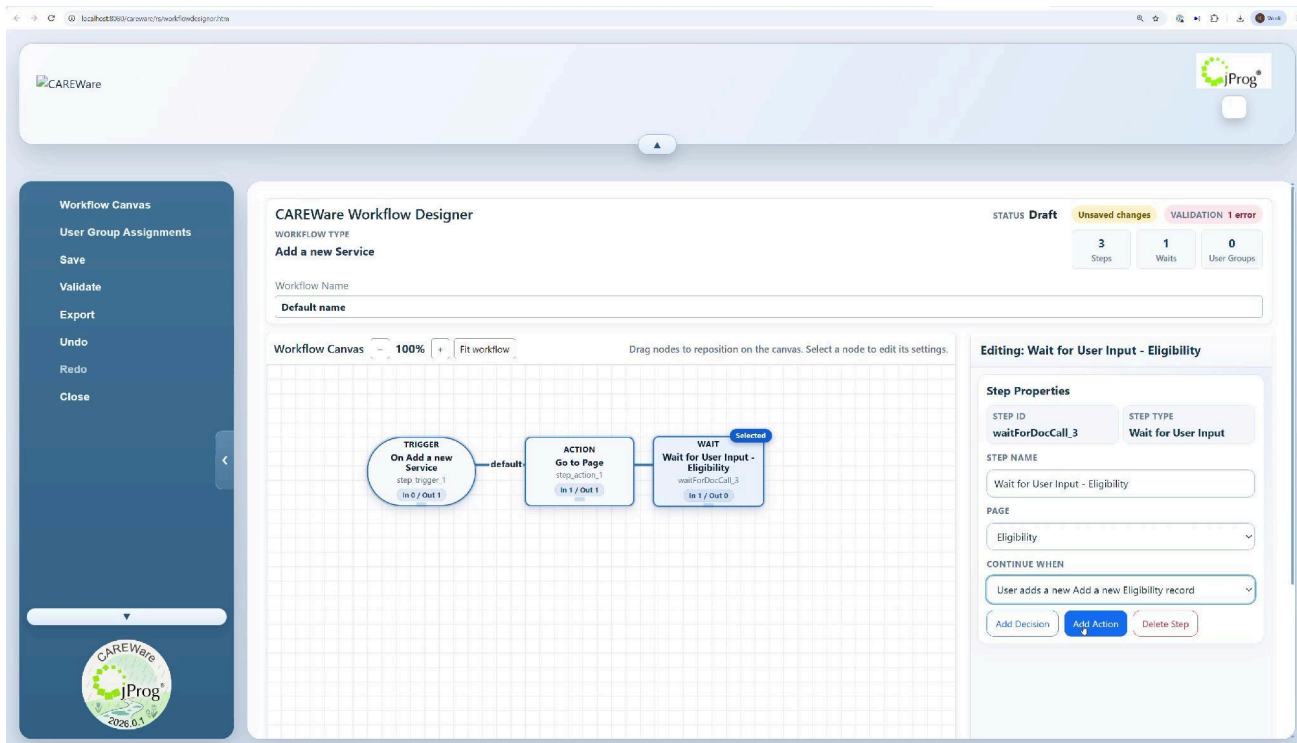
Step 10. Select the Destination, such as Add Screen when the workflow should open a new-record form.

The screenshot displays the CAREWare Workflow Designer interface. On the left is a sidebar with navigation options: Workflow Canvas, User Group Assignments, Save, Validate, Export, Undo, Redo, and Close. The main workspace is titled 'CAREWare Workflow Designer' and shows a workflow canvas with a grid. A trigger node 'On Add a new Service' is connected to an action node 'Go to Page'. The action node is highlighted with a 'Selected' label. To the right of the canvas is a 'Step Properties' panel for the 'Go to Page' action. It includes fields for Step ID, Step Name, Action Type (set to 'Go to Page'), Target Page (set to 'Eligibility'), and Destination (set to 'Add Screen'). There are also buttons for 'Add Action', 'Add Wait for User Input', and 'Delete Step'. The top right of the interface shows status indicators: Draft, Unsaved changes, and Validation No errors.

Step 11. Click Add Wait for User Input.

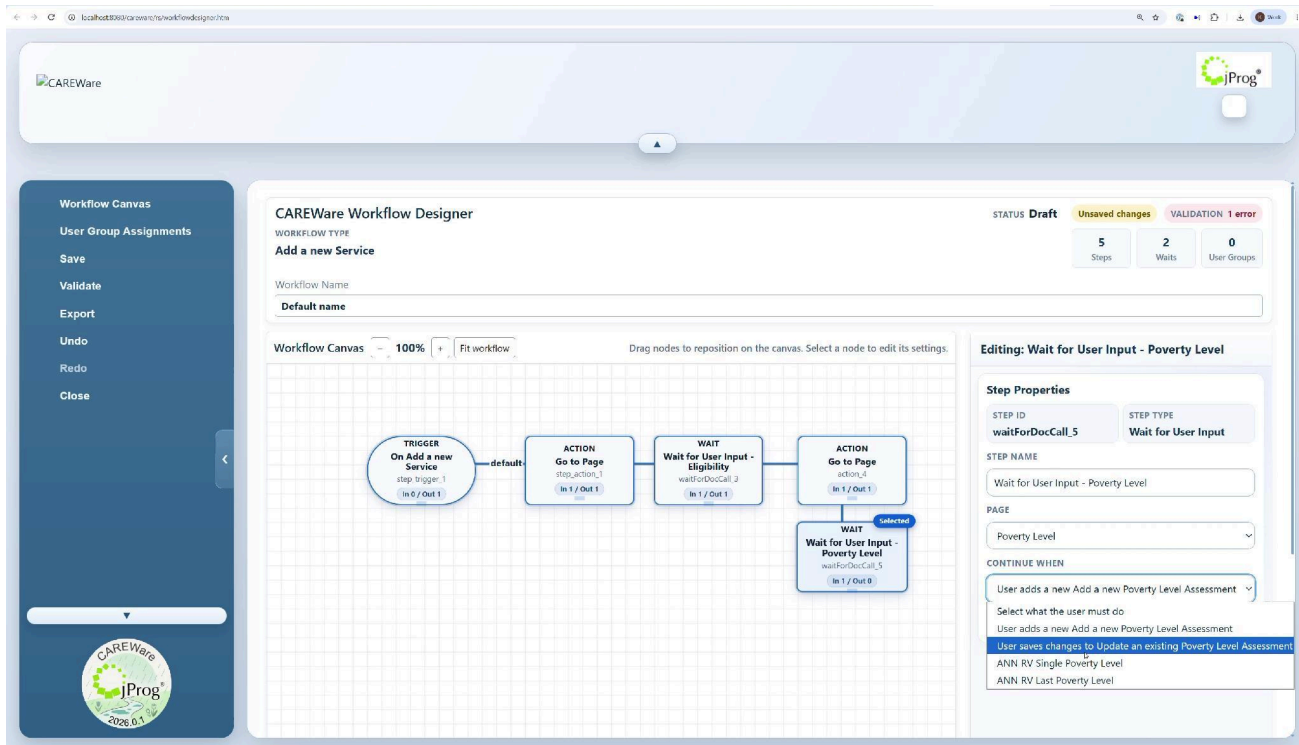
Step 12. Select the Page.

Step 13. Select Continue When to define the saved-record event that advances the workflow.



Configure continue events and repeatable page patterns

Continue when choices can include multiple event types for the same page. For service, for example, CAREWare shows add-new, update-existing, and report/lookup-related options. It may be appropriate to have a user enter multiple services before continuing to the next step after service entry or completing the workflow.



Reusable configuration patterns

Pattern	Sequence	Use when
Data-entry checkpoint	Go to Page > Wait for User Input	The workflow should open a page and continue only after a record is saved.
Instruction only	Show Message	The user only needs guidance or a completion notice.
Save confirmation	Confirm Before Save	The user must acknowledge a message before saving.
Save prevention	Block Save	The workflow must prevent a save at that point.
Notification	Send Message to User	Another user needs a workflow-generated message.
Conditional path	Wait for User Input > Add Decision	A saved event should branch to different next steps.

Important

Name every step by page and purpose. The RSR and ADR design guides specifically recommend

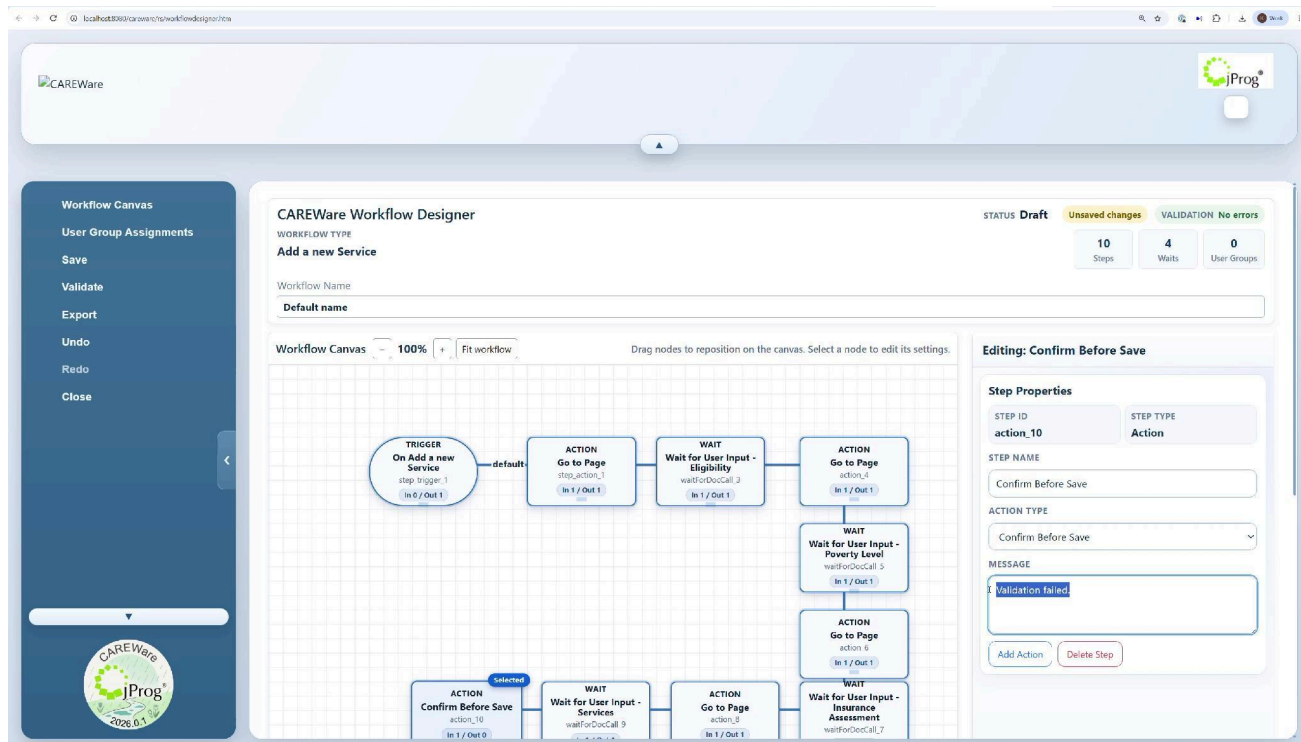
page/purpose naming because large canvases become difficult to understand when generic names are repeated.

Messages, confirmations, and save controls

Step 14. Add an Action after the step where the message or save behavior should occur.

Step 15. Choose Show Message, Confirm Before Save, Block Save, or Send Message to User as appropriate.

Step 16. Enter concise message text that tells the user exactly what happened or what to do next.



Warning

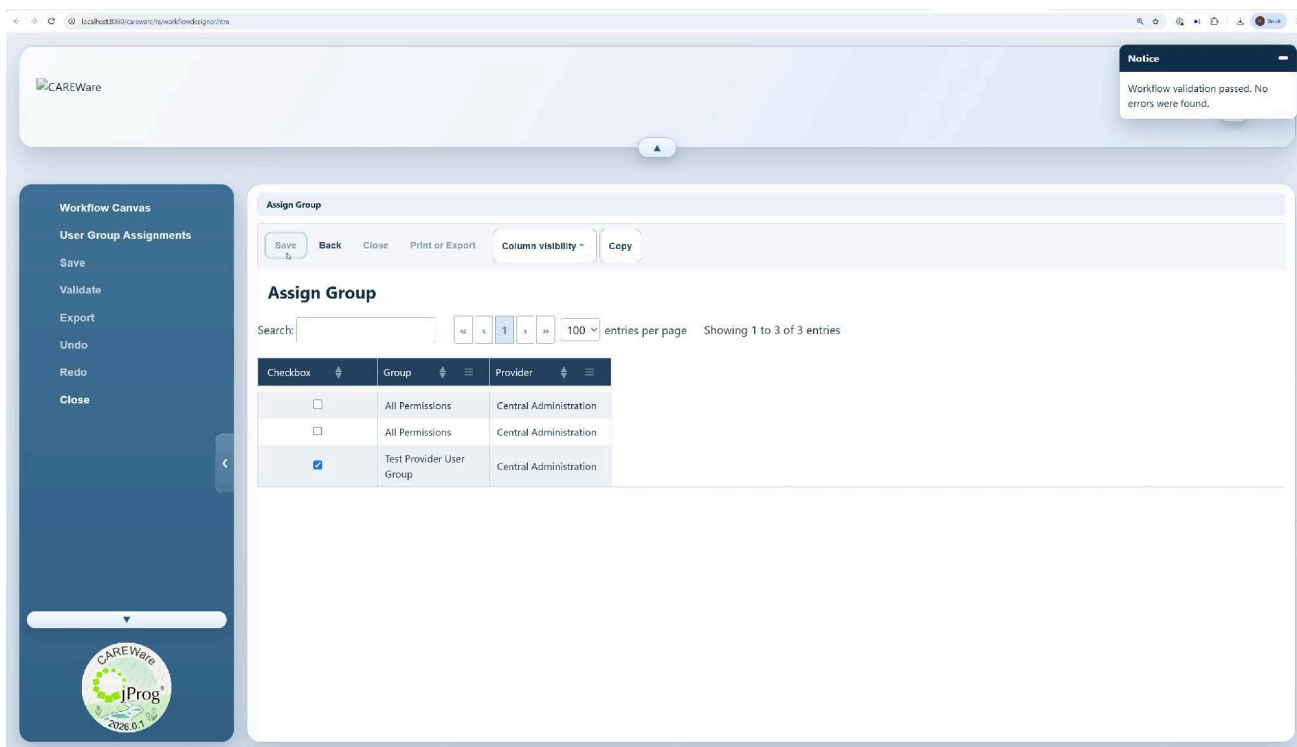
A completion message is a staff prompt, not an RSR or ADR calculation. For reporting workflows, direct staff to the appropriate [ADR Validation Report/RSR Validation Report](#) or [ADR Viewer/RSR Viewer](#) after the sequence completes to confirm the records are counted for the reports.

Save, validate, assign, and publish

Step 17. Click Save after major edits.

Step 18. Click Validate. Correct every reported error and validate again until No errors displays.

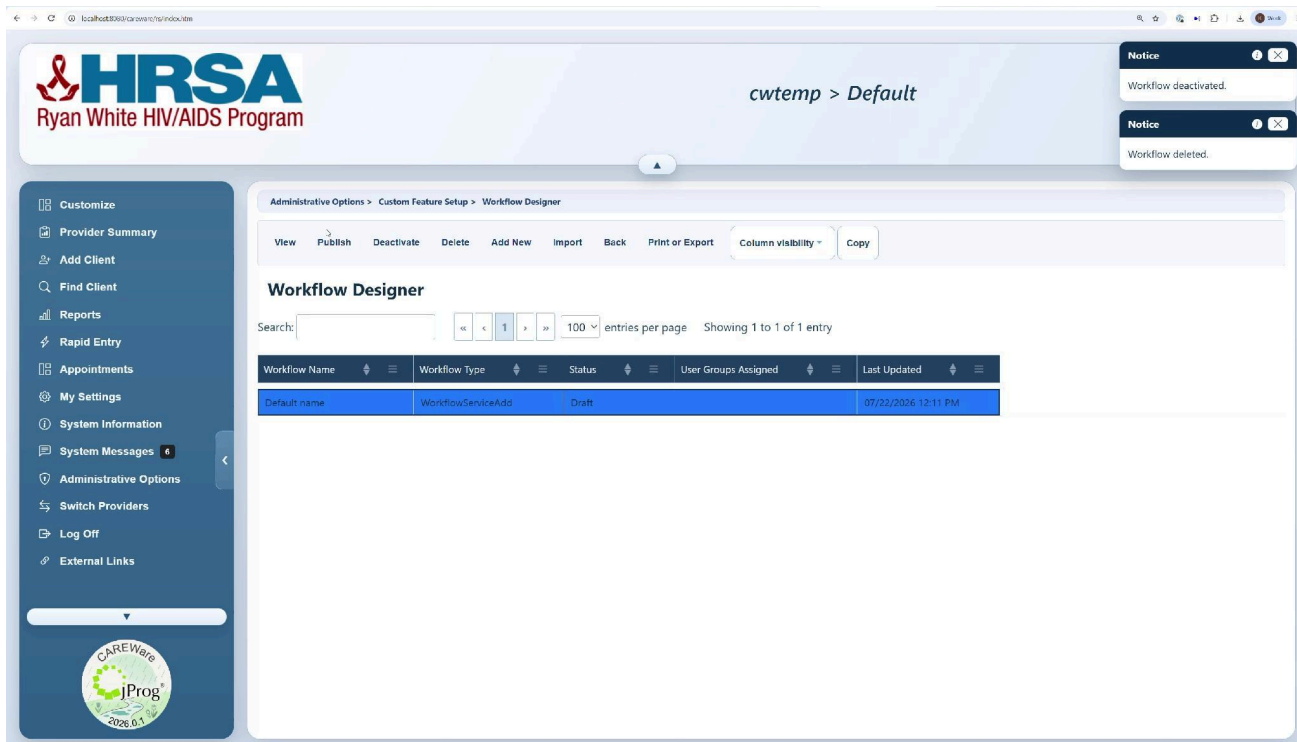
Step 19. Open [User Group](#) Assignments. Select only the group(s) that should use or test the workflow, then save.



Step 20. Click Close to return to the Workflow Designer list.

Step 21. Select the workflow and click Publish when validation and testing are complete.

Step 22. Confirm the workflow status is Active.



Important

Deactivate a production workflow before making changes that could interrupt active users. Revalidate and retest after changes before republishing.

Workflow list and maintenance configurations

Control	What it does / when to use
View	Open the selected workflow for review or editing.
Publish	Activate a validated draft for assigned groups.
Deactivate	Stop an active workflow from triggering while it is being revised or retired.
Delete	Remove a workflow. Use cautiously and follow local change-control procedures.
Add New	Create a new workflow from a selected workflow type.
Import	Import a workflow definition where supported. Validate imported workflows before assignment or publication.
Print or Export	Produce a list/export for documentation or review.
Column visibility	Show or hide list columns.
Copy	Adds selected text from lists to a clip board to be pasted in a document
Export (inside canvas)	Export the workflow design for documentation/transfer where supported.
Undo / Redo	Reverse or reapply recent canvas edits before saving.
Fit workflow / zoom	Adjust the canvas view only; these controls do not change workflow logic.

Testing checklist and troubleshooting

Before publication

- Trigger the workflow with a test record and confirm it starts in the intended provider.
- Complete every Go to Page + Wait sequence using the same user group that will run the workflow.
- Test an interrupted session: close/log out, reopen the same provider and client record, and confirm the pending workflow resumes as intended.
- Verify any message, confirmation, block-save behavior, branch, or prefilled value.
- Validate again after every structural change and confirm No errors before publishing.

Common questions

Issue	Check
Workflow Designer is not available	Confirm provider, Administrative Options/Custom Features access, and Edit Workflow Designs permission.
Workflow does not start	Confirm it is Active, the user group is assigned, the trigger event occurred, and the user is in the correct provider.
Workflow stops after opening a page	Confirm a Wait for User Input follows the page action and Continue When matches the saved-record event.
User can open a page but cannot save	Review user-group permissions, required fields, active setup values, and page-level validation messages.
Validation reports an error	Select the affected node, complete required properties, and confirm the sequence is properly connected.
Reporting client is still missing	Review the relevant RSR or ADR requirements and run the corresponding validation/report/viewer tools. Ensure the workflow includes Wait Confirmation steps for all required ADR/RSR data elements.

RSR and ADR design

From the RSR workflow references

- Plan the page order and the saved-record event before building.
- Use a small test group first.
- Verify that every assigned user can open and save every page in the sequence.
- Use Go to Page + Wait for User Input for Enrollment Status, Eligibility, HIV Status, Services, Insurance Assessment, Poverty Level, Annual Screening, and labs (If OAHS are delivered) when building new-client RSR workflows.
- Verify actual RSR inclusion with [RSR Client Report](#)/Viewer and RSR Validation tools rather than the workflow completion message.

From the ADR workflow references

- Use the same Go to Page + Wait pattern for ADAP Enrollment History, HIV Status, Drug Services/Payments, and Services.
- Choose the save event that reflects the record the user must complete.
- Confirm enrollment status, reporting-year dates, qualifying records, and ADR validation results after workflow completion.

Tip

The safest reusable design pattern is: trigger > page action > wait save-event > next action. Add messages, confirmations, decisions, or save controls only where they serve a clear business rule.

Related CAREWare guides and references

The following CAREWare Knowledge Base guides are relevant to workflow setup, permissions, client creation, service entry, and report validation. These links were reviewed on 8/10/2026.

Guide	How it helps
Manage User Groups	Set up permission groups and confirm provider-level permissions before assigning workflow users.
Manage Users	Assign providers, groups, and permissions to individual users.
Add Client	Review required identity fields and duplicate-match handling for new-client workflows.
Eligibility	Review eligibility data and permissions used by RSR-related workflows.
Services	Review service entry, contract/service selection, and Save/Save and Add behavior.
RSR	Overview of RSR permissions, client report, viewer, and validation tools.
RSR Viewer	Verify RSR counts and drill into affected client records.
RSR Documents	Open current RSR manuals, data elements, field maps, and related materials.
ADR	Overview of ADR inclusion and reporting tools.
ADR Client Report	Generate the ADR XML and review common data-quality trouble spots.
ADR Viewer	Review ADR XML and drill into client-level issues before submission.

Importing and exporting workflows

Workflows are provider specific, so they are created in the provider and accessible by staff that are assigned to that provider's user groups. To share workflows with other providers, the workflow can be exported and then imported to the provider.

Important

At this time, only built in CAREWare fields can be included in exported workflows. Custom fields, forms, and subforms are excluded from being exported from a provider or imported to another provider.

Exporting a Workflow

Step 1. Open the workflow to be exported

Step 2. Click Export

The file now appears in the download folder selected in the browser settings. The file is a .json file.

CAREWare

Workflow Canvas

User Group Assignments

Save

Validate

Export

Undo

Redo

Close

CAREWare Workflow Designer

WORKFLOW TYPE

Finalize a new Client

Workflow Name

Add New ADR Client

Workflow Canvas - 100% + Fit workflow

TRIGGER

On Finalize a new Client

step_trigger_1

In 0 / Out 1

ACTION

Go to Page - ADAP Enrollment History

step_action_1

In 1 / Out 1

WAIT

Wait for User Input - ADAP Enrollment History

waitForDocCall_3

In 1 / Out 1

ACTION

Go to Page - HIV Status

action_4

In 1 / Out 1

WAIT

Wait for User Input - HIV Status

waitForDocCall_5

In 1 / Out 1

ACTION

Show Message

action_10

In 1 / Out 0

WAIT

Wait for User Input - Services

waitForDocCall_9

In 1 / Out 1

ACTION

Go to Page - Services

action_8

In 1 / Out 1

WAIT

Wait for User Input - Drug Services

waitForDocCall_7

In 1 / Out 1

ACTION

Go to Page - Drug Services

action_6

In 1 / Out 1

Exporting a Workflow

Step 1. In the Workflow Designer list, click the workflow to be exported to highlight it.

Step 2. Click Import.

Administrative Options > Custom Feature Setup > Workflow Designer

View

Publish

Deactivate

Delete

Add New

Import

Back

Print or Export

Column visibility

Copy

Workflow Designer

Search:

<< < 1 > >>

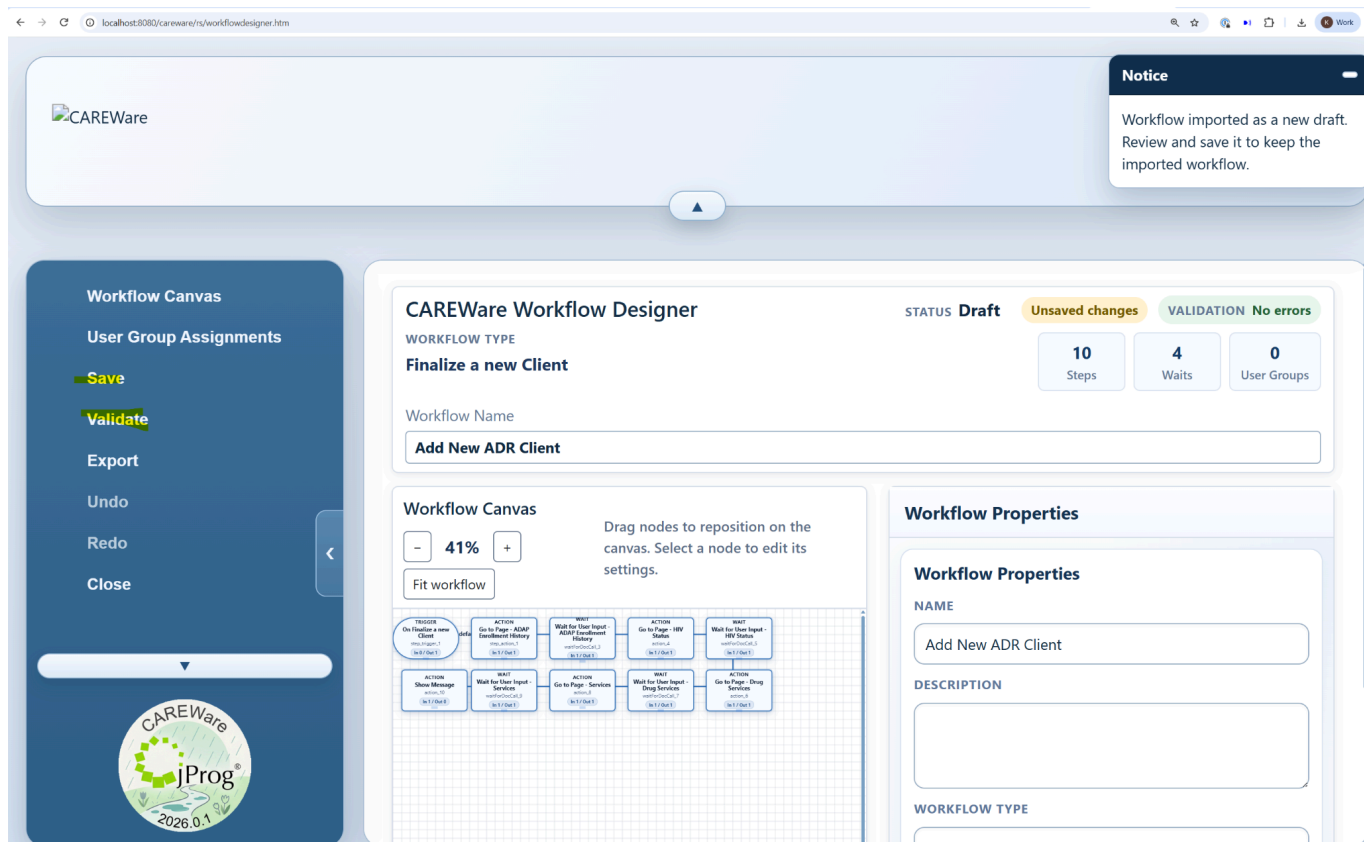
100 entries per page

Showing 1 to 1 of 1 entry

Workflow Name	Workflow Type	Status	User Groups Assigned	Last Updated
Add New ADR Client	WorkflowClientAddFinalized	Active	ADAP Template, All Permissions	07/28/2026 12:08 PM

Step 3. Select the .json file for the workflow that should be imported.

Step 4. Click Open



Step 5. Once the workflow is imported, click **Validate** to ensure the workflow works for this provider.

Step 6. Click **Save** to complete the import.

Examples of workflows that can be downloaded for use in CAREWare

RSR

Add RSR Client Workflow Design User Guide	A brief step by step walk through of the workflow process for the RSR
Add RSR Client Workflow Design Video	A video showing the steps to create a basic RSR workflow
Add RSR Client Workflow Data Entry User Guide	A step by step guide for the process users go through in a client record once the workflow is enabled
Add RSR Client Workflow Data Entry Video	A video showing the steps users go through if the workflow is enabled.
Example RSR Client Workflow	Example RSR Client Workflow: Follow the steps for importing a workflow to add it to a provider

ADR

<u>Add ADR Client Workflow Design User Guide</u>	A brief step by step walk through of the workflow process for the ADR
<u>Add ADR Client Workflow Design Video</u>	A video showing the steps to create a basic ADR workflow
<u>Add ADR Client Workflow Data Entry User Guide</u>	A step by step guide for the process users go through in a client record once the workflow is enabled
<u>Add ADR Client Workflow Data Entry Video</u>	A video showing the steps users go through if the workflow is enabled.
<u>Example ADR Client Workflow</u>	Example ADR Client Workflow: Follow the steps for importing a workflow to add this to the ADAP provider.