# Workflow Designer

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|---|---|
| **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.

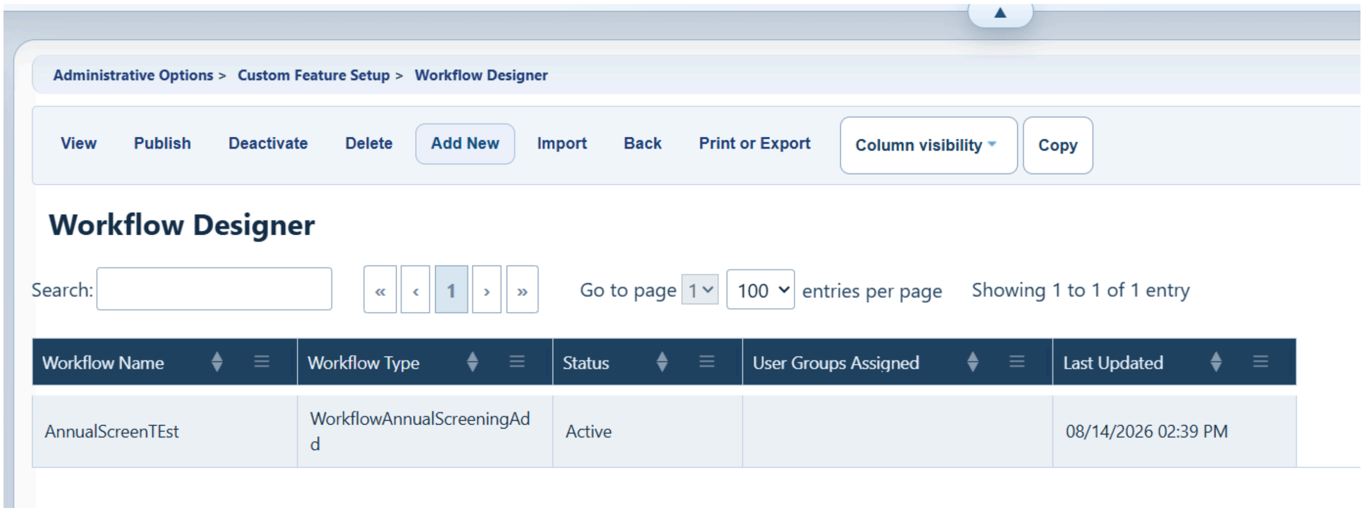
> **Important**
> The RSR and ADR workflow guides use the same design pattern, however show basic steps for a workflow that results in a client counted for the RSR and ADR reports.

## Open Workflow Designer and create a draft

**Step 1.** Click Administrative Options.

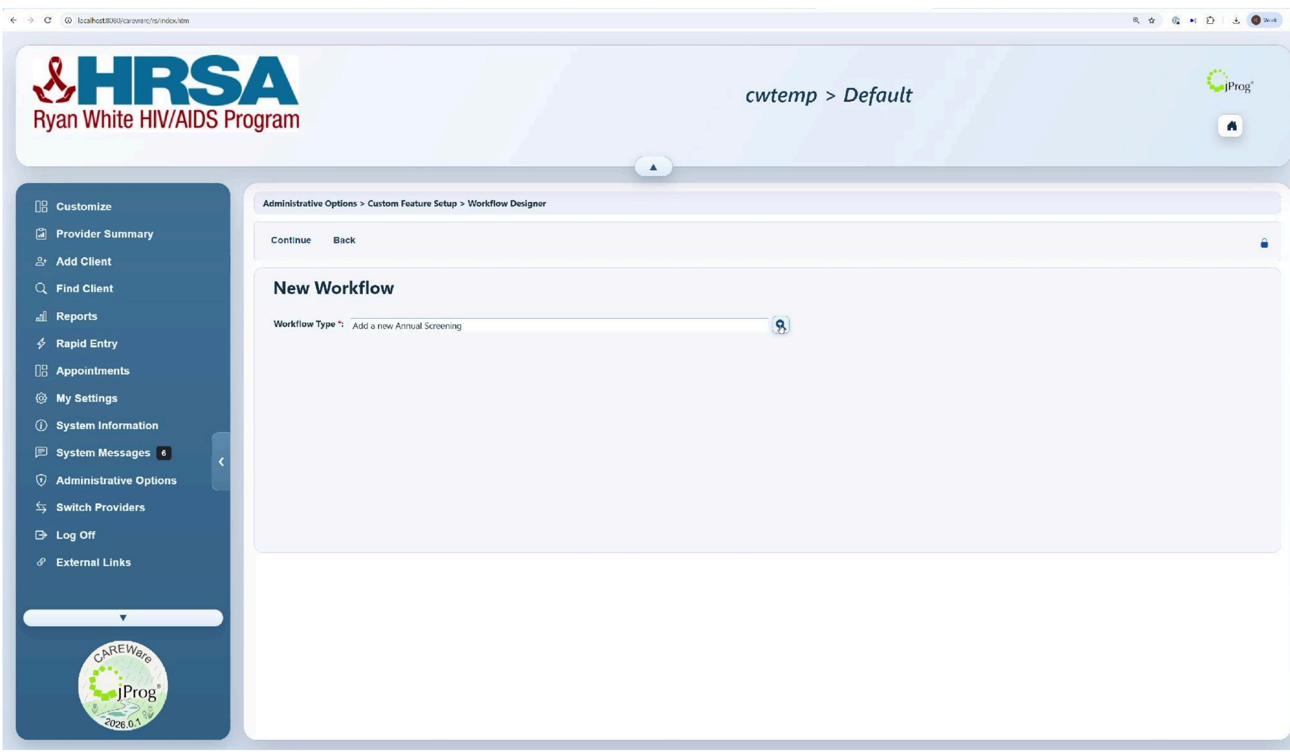
**Step 2.** Open Custom Features, then click Workflow Designer.

**Step 3.** Click Add New.




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

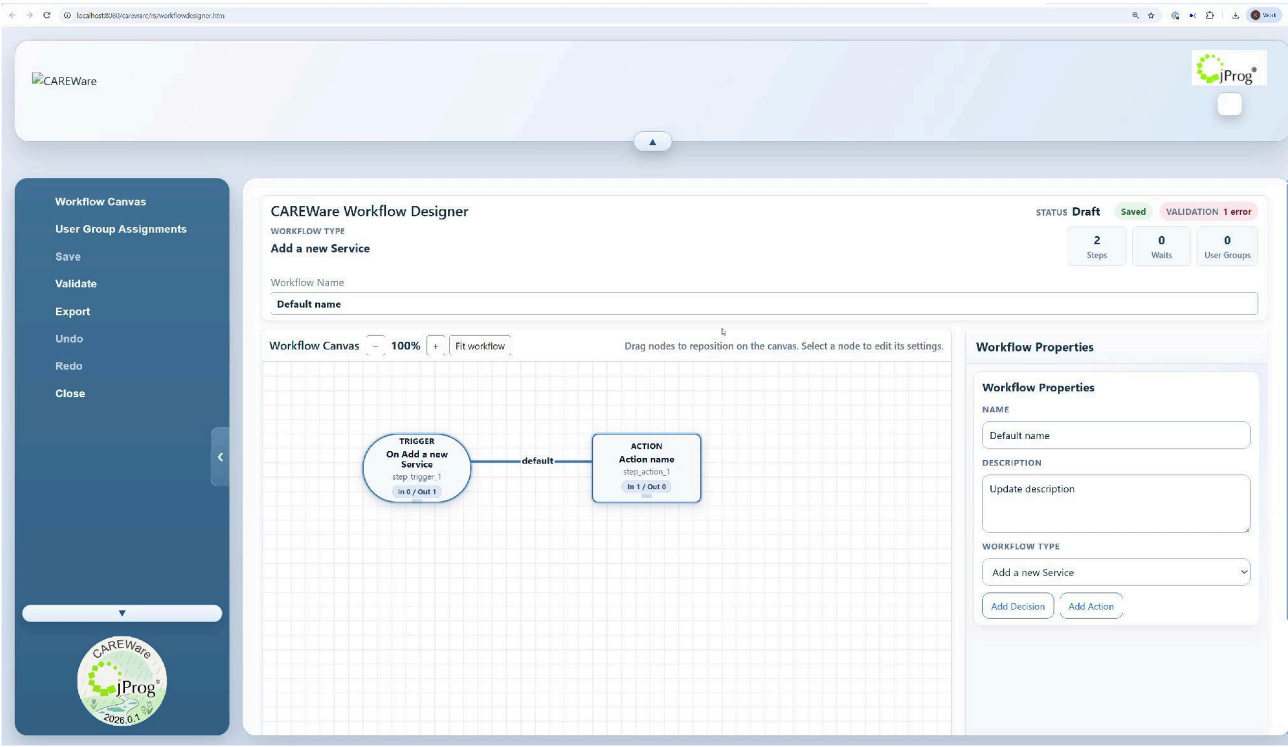
**Step 5.** Enter a clear Workflow Name that describes the trigger and purpose.




> **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

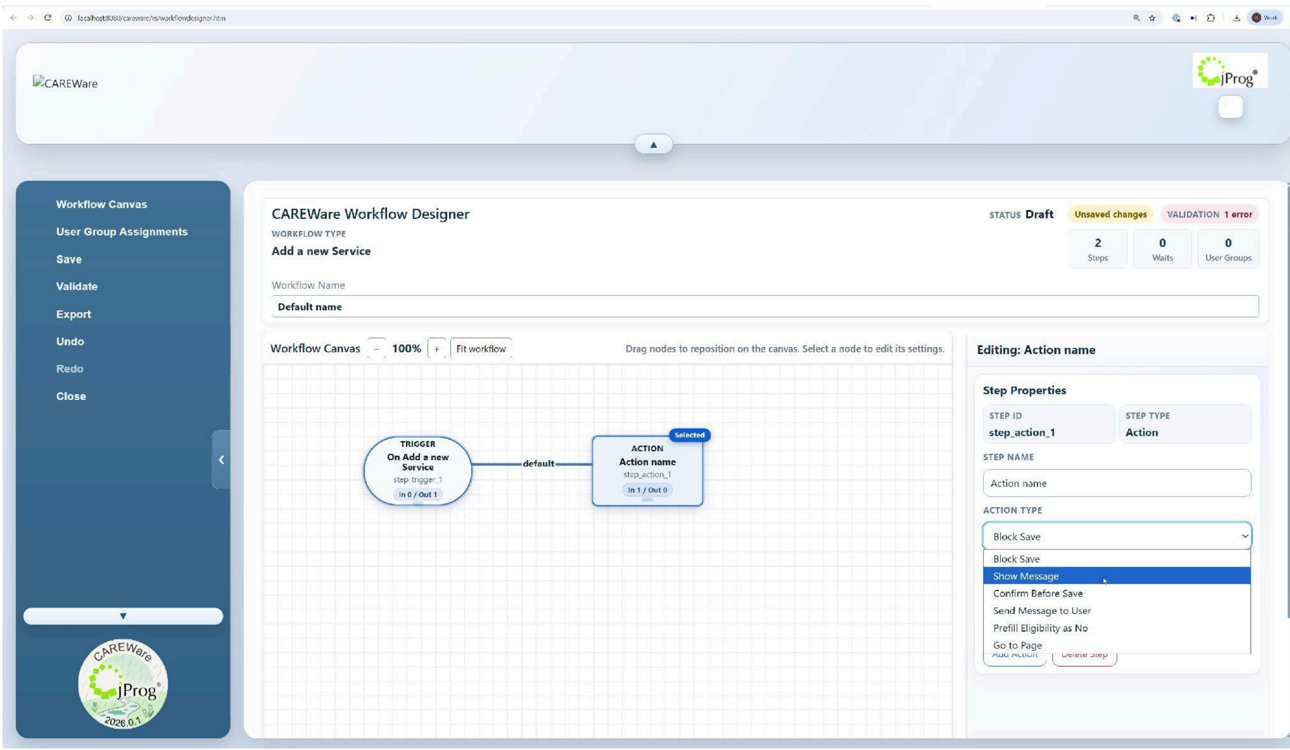
| Step type | What it does | Typical use |
|---|---|---|
| Trigger | Starts the workflow when the selected workflow event occurs. | Finalize a new client; add a service; add an assessment or other available workflow event. |
| Action | Performs a configured workflow behavior. | Navigate, display a message, 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. |
| 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. |
| 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. |

| Action Type | Configuration / use |
|---|---|
| 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. |

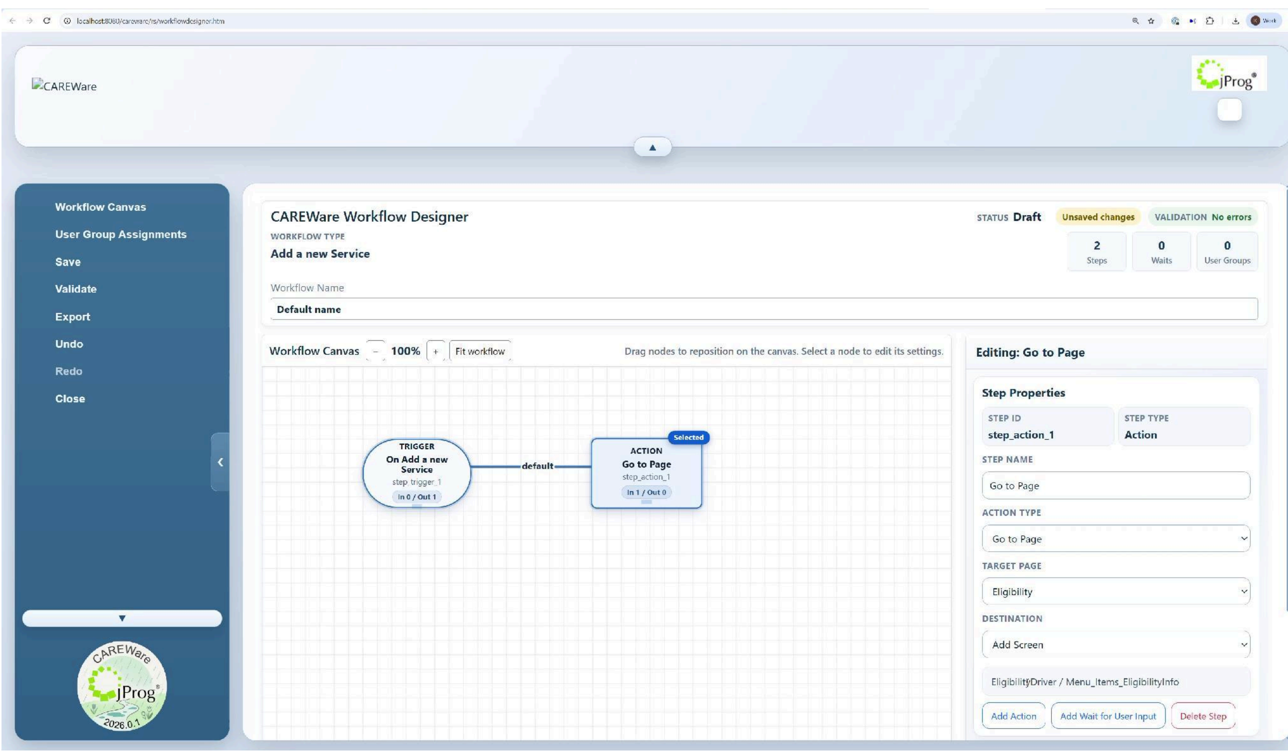
**Warning**
Do not use Block Save or prefilled values as substitutes for business rules or source documentation. Test the exact user role and page permissions before publication.

# Go to Page and Wait for User Input

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

**Step 9.** Select the Target Page.

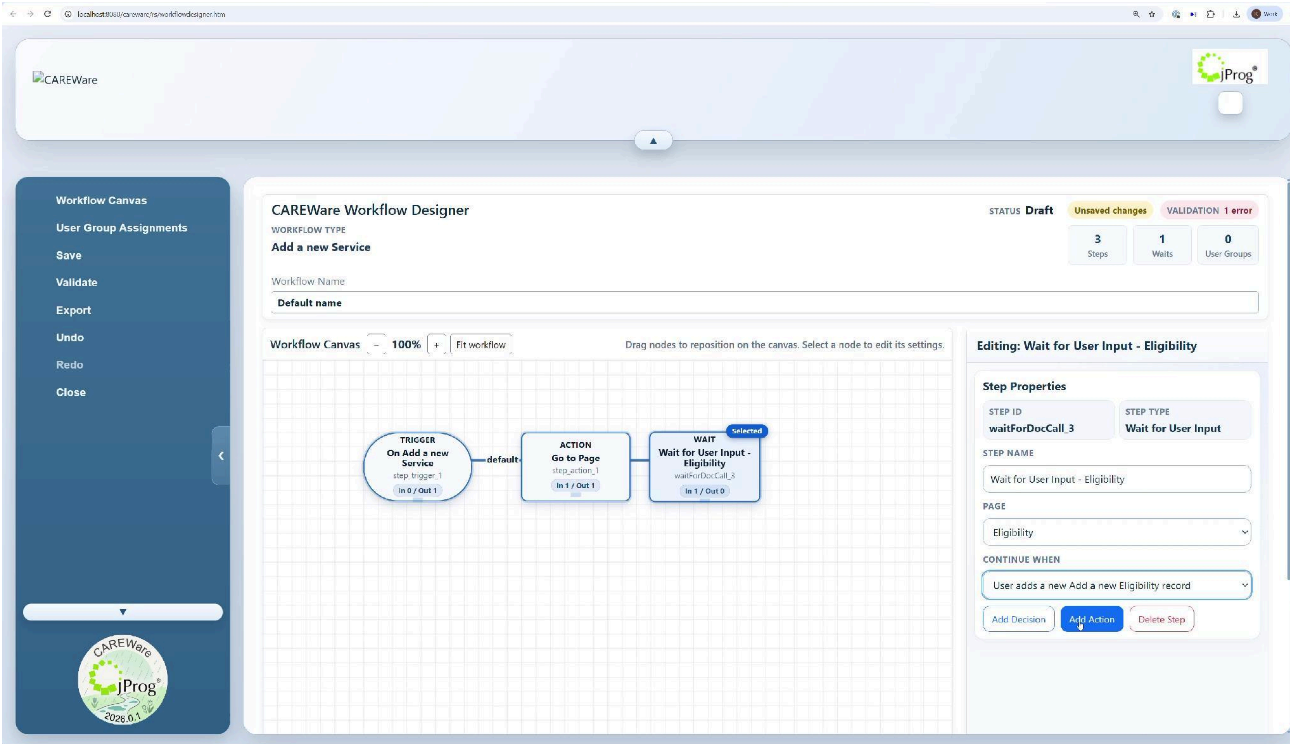
**Step 10.** Select the Destination, such as Add Screen when the workflow should open a new-record form.




**Step 11.** Click Add Wait for User Input.

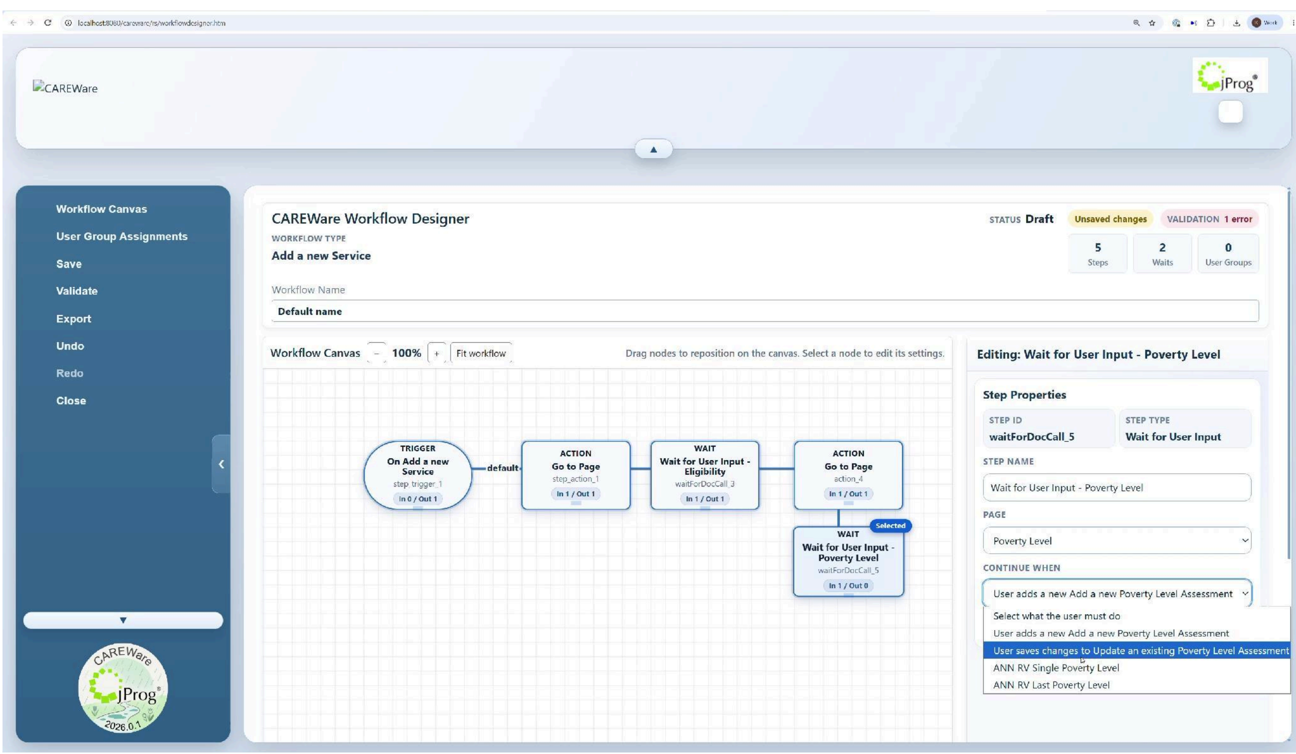
**Step 12.** Select the Page.

**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. |

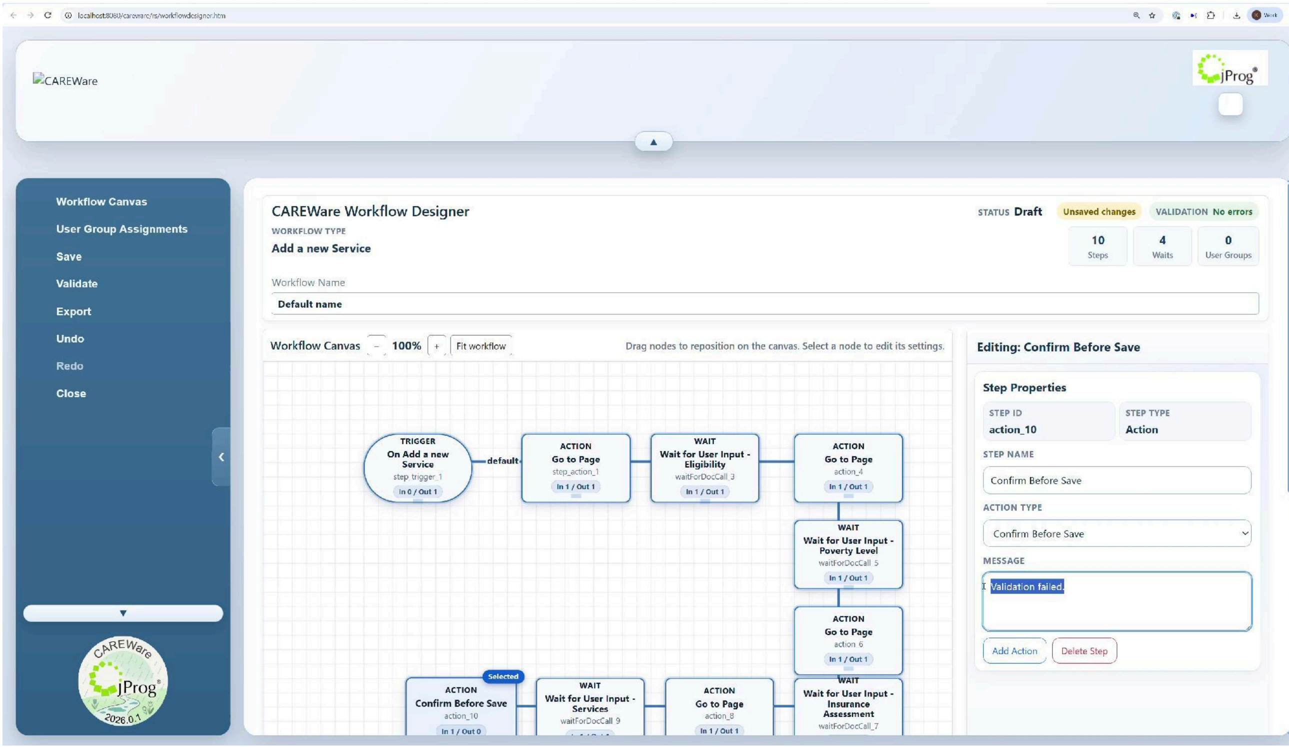
> **Important**
> Name every step by page and purpose. The RSR and ADR design guides specifically recommend page/purpose naming because large canvases become difficult to understand when generic names are repeated.

## 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**

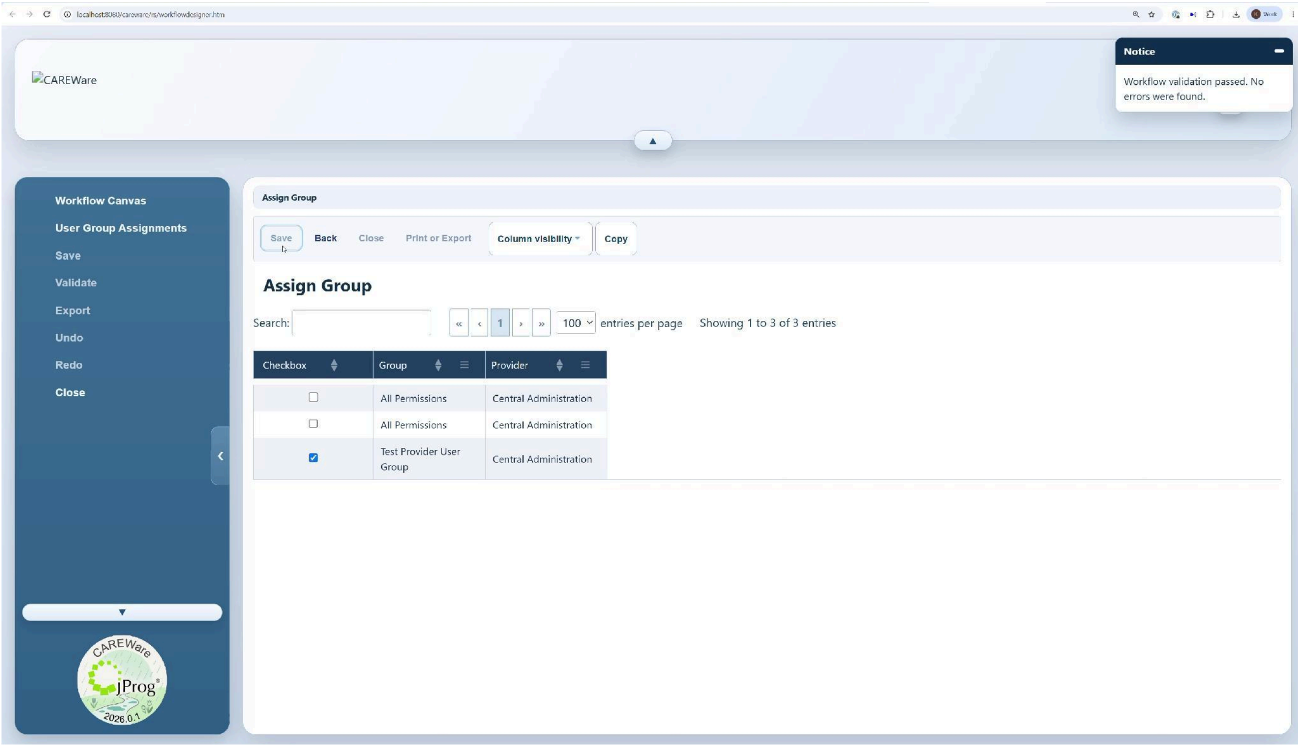
A completion message is a staff prompt, not an RSR or ADR calculation. For reporting workflows, direct staff to the appropriate ADR Validation Report/RSR Validation Report or ADR Viewer/RSR Viewer after the sequence completes to confirm the records are counted for the reports.

# 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.

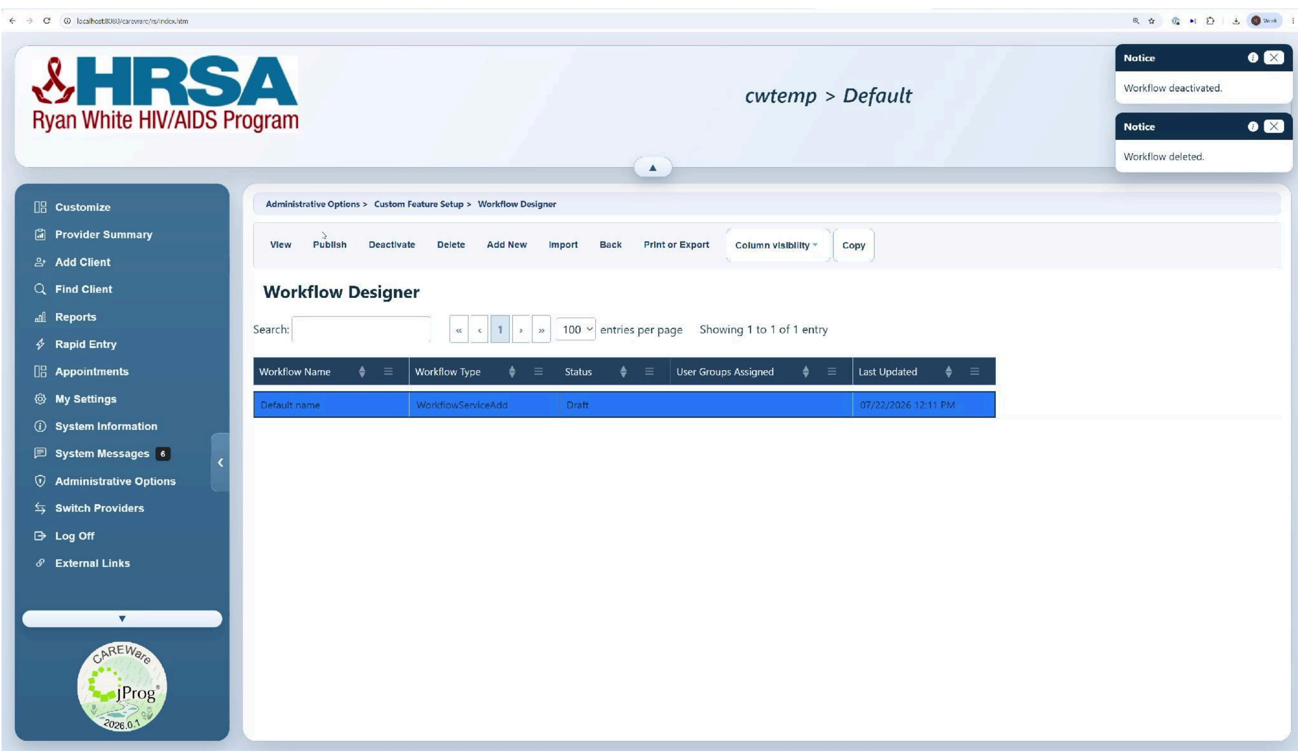
**Step 19.** Open User Group Assignments. Select only the group(s) that should use or test the workflow, then save.




**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.

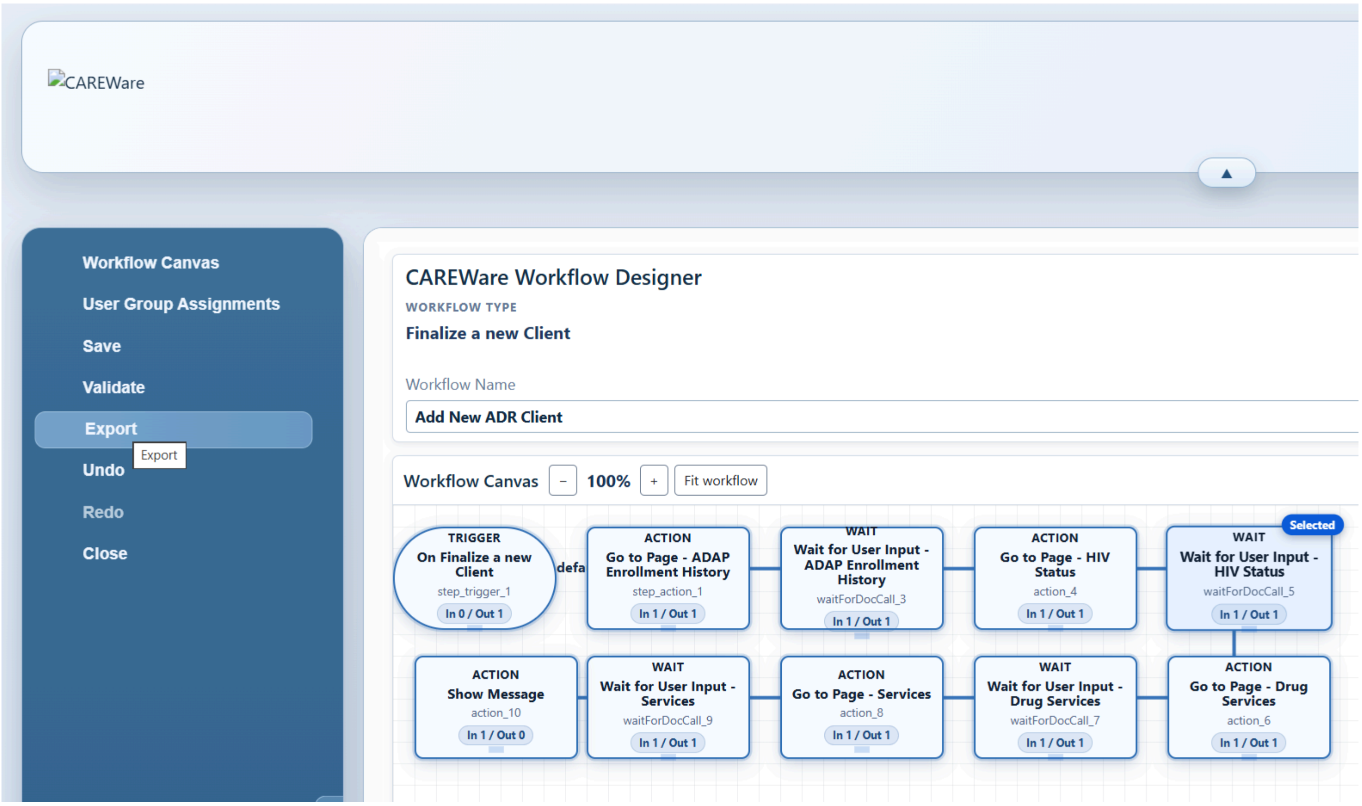
**Important**
At this time, only built in CAREWare fields can be included in exported workflows. Custom fields, forms, and subforms are excluded from being exported from a provider or imported to another provider.

## Exporting a Workflow

### Step 1. Open the workflow to be exported

### Step 2. Click Export

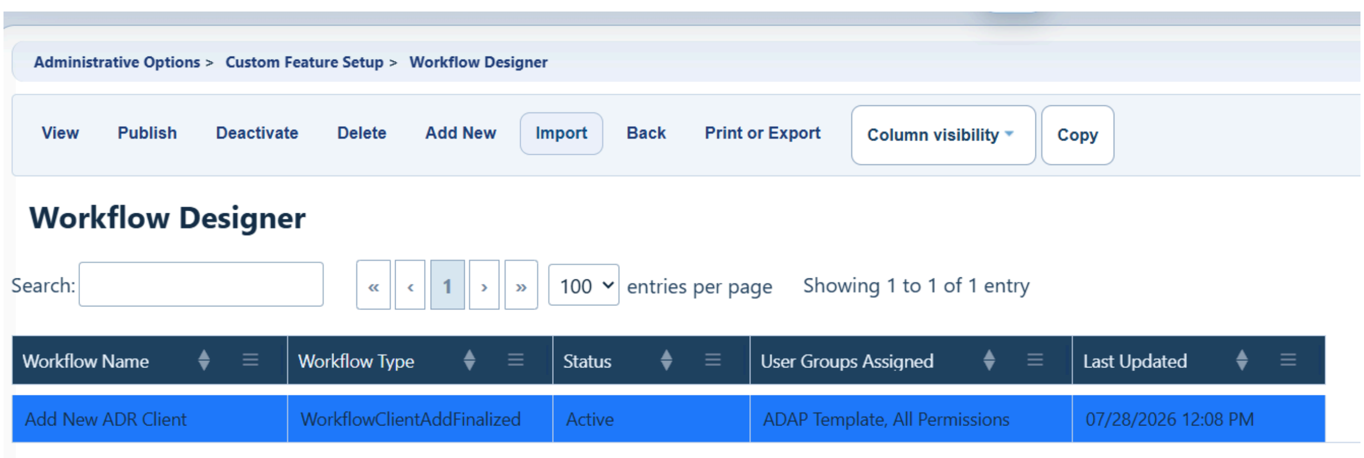
The file now appears in the download folder selected in the browser settings. The file is a .json file.




## Exporting a Workflow

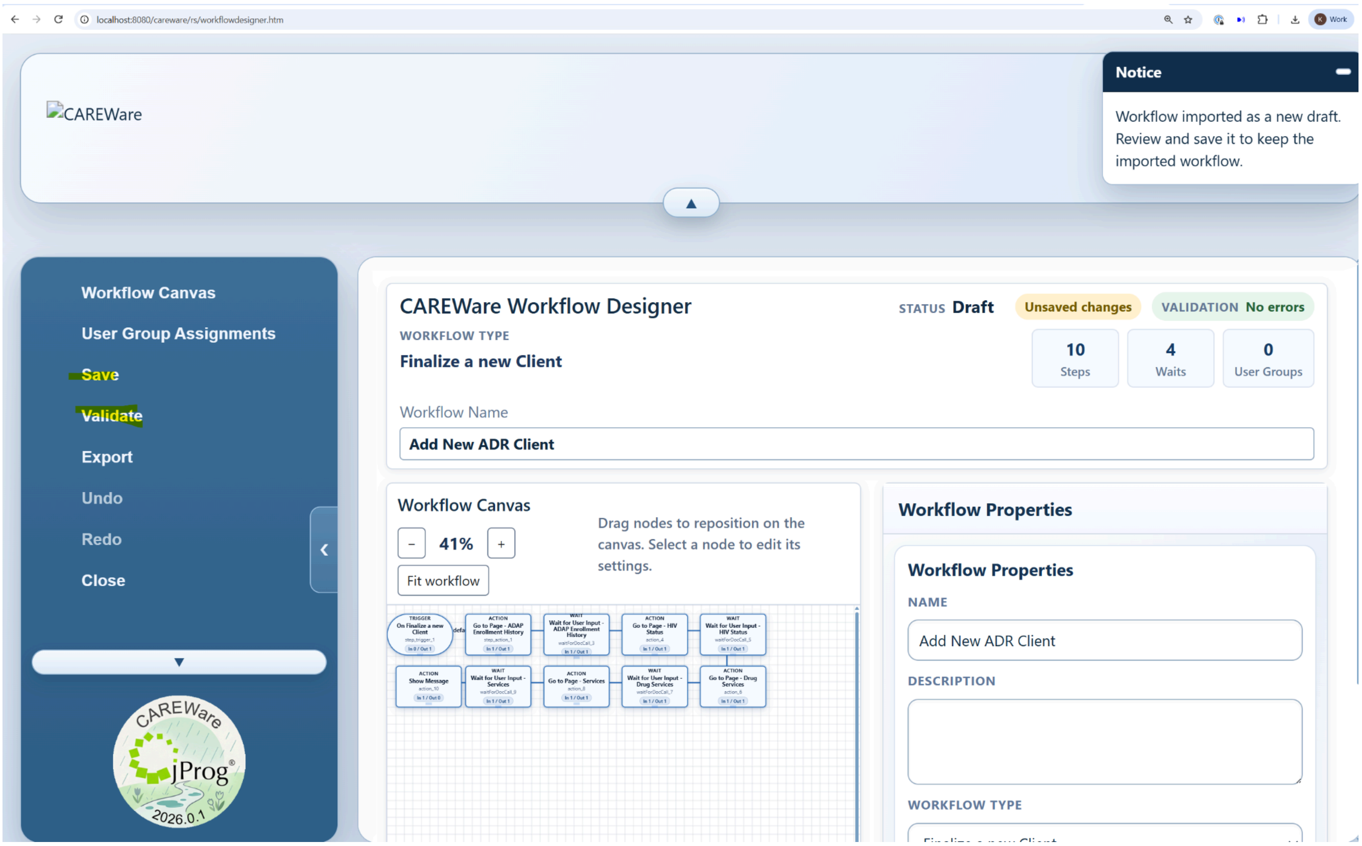
### Step 1. In the Workflow Designer list, click the workflow to be exported to highlight it.

### Step 2. Click Import.




### 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

| | |
|---|---|
| **Add ADR Client Workflow Design User Guide** | A brief step by step walk through of the workflow process for the ADR |
| **Add ADR Client Workflow Design Video** | A video showing the steps to create a basic ADR workflow |
| **Add ADR 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 ADR Client Workflow Data Entry Video** | A video showing the steps users go through if the workflow is enabled. |
| **Example ADR Client Workflow** | Example ADR Client Workflow: Follow the steps for importing a workflow to add this to the ADAP provider. |