

Workflows Overview

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Workflow is a progression of steps (tasks/events/interactions) that comprise a business process. Each step is dependent on an occurrence of a previous step (for example, an approval or rejection of a form).

The workflow tab should be considered as your 'to do list' for actions required within CareRight.

Initial Setup

CareRight provides the ability for a System Administrator to build forms or templates which may be in a certain state after they are approved or rejected, or maybe its a simple followup reminder. Workflow actions which require attention will appear within you dashboard Workflow tab.

Permissions

The Workflow tab will only appear if your System Administrator has given you access.

Viewing and Editing Workflow Actions

The following information will be provided based on each outstanding action:

Banner Item	Description
Model	The process or form type/name
State	The stage of the form
Count	The number of items for each model which need attention
Oldest	The oldest day/month of each model which has not been actioned

Click **Show** to list all actions for each model. The list will appear from the oldest down the most recent.

The workflow can then be viewed and actioned by clicking Edit. There are many variables on how a user may interact with each workflow, as your business process will be defined by your organisation.

Workflow Models

Main Interface

Features:

- Filtering: Content can be filtered by user.
- Sorting: Content can be sorted by Oldest First or Newest First.
- Display Summary: If a Display Summary is available, it will be displayed in the workflow model row entry.

CR TIMDEV2 (MS)

Dashboard

Appointments

Cases

Correspondence

Events

Followups

Imports

Invoices & Claims

Locations

Patients

Professional Contacts

Providers

Reconciliation

Reports

Tasks

Theatre Lists

Wait List

Workflows

Workflow Models

CURRENTARCHIVED

Dashboard

On boarding new patient in state approved

Any UserNewest First

Model:On boarding new patient 1.3

Location:Clintel Clinic

Patient:Edmund Barton

User:Mr System Administrator

Stage:approved

Age:7 months

Show

Edit

Example summary display for assessment 51171 which is used in the onboarding workflow.

nature_of_cond = foo foo

Model:On boarding new patient 1.0

Location:Westmead Clinic

Patient:Mrs Dot Q O'Barefoot

User:Mr System Administrator

Stage:approved

Age:9 months

Show

Edit

Model:On boarding new patient 1.3

Location:Clintel Clinic

Patient:Max Knowles

User:Mr System Administrator

Stage:approved

Age:about 1 year

Show

Edit

Example summary display for assessment 51171 which is used in the onboarding workflow.

nature_of_cond = testMax

Model:On boarding new patient 1.0

Location:Westmead Clinic

Patient:Mrs Dot Q O'Barefoot

User:Mr System Administrator

Stage:approved

Age:about 1 year

Show

Edit

Patient-view Interface

CR TIMDEV2 (MS)

Dashboard

Patients

Mrs Maggie Peggy Carlson

Accounts

Admissions

Alerts and Allergies

Appointments

Assessments

Cancer Notifications

Cases

Clinical Notes

Correspondence

Diagnosis & History

Documents

Events

Followups

Image Gallery

Invoices & Credits

Measurements

Medications

Mrs Maggie Peggy Carlson

ALERTALLERGYNOTICE

Facility: Burswood File Number: 000002 CRN: 9999 Primary Provider: Dr Juan Krill Referrer: Dr Felicity Bn (32571196) Home: Flinders, 31, Kent Town 5067 Fund: iTest Health Fund, ECF1001ZZ 1 Female, aged 35 years, born on August 24, 1983, last admitted to Bowen Hills. Mobile Phone: 0426286951

Interpreter Requiredaa 48218 2Doesnt pay billsAccounting

CURRENTARCHIVED

New

Dashboard / Patients / Mrs Maggie Peggy Carlson

Workflows

Any UserOldest First

Model:On boarding new patient 1.2

Location:Burswood Day Facility

User:Mr System Administrator

Stage:approved

Age:over 2 years

Show

Edit

Model:On boarding new patient 1.3

Location:Burswood Day Facility

User:Mr System Administrator

Stage:medicalAssessment

Age:about 1 year

Show

Edit

Model:On boarding new patient 1.3

Location:Burswood Day Facility

User:Mr System Administrator

Stage:medicalAssessment

Age:about 1 year

Show

Edit

Example summary display for assessment 51171 which is used in the onboarding workflow.

nature_of_cond = testMaggie