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.

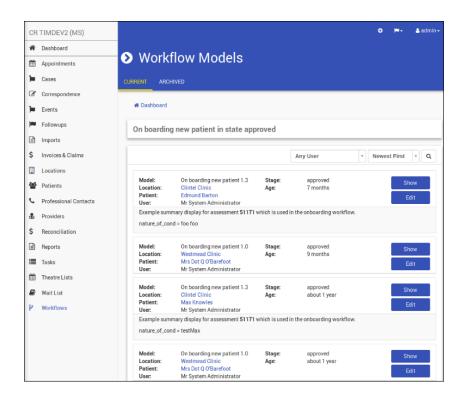
The workflow can then be viewed and actioned by clicking Edit. There are many variables on how a user may interact with each workflow, as your business process will be defined by your organisation.

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.



Patient-view Interface

