

Setting Up Control Rules

Purpose	Set rules and criteria for fields placed on a form.
Who should do this	CAREWare administrators and form designers responsible for data quality.
Use Control Rules when you need to	Require, warn, disable, or hide controls based on criteria.
Main warning	Test each rule before users rely on the form for data entry.

Quick path

Open the form in Form Designer > select a control > Control Rules > Add.

Before you begin

Open the form in Form Designer.

Select the control that should have the rule.

Know the action, message, and criteria the user should see.

Tip

Use clear messages. A rule message should tell the user what to fix, not only that something is wrong.

Add a control rule

Use these steps to create a rule and criteria.

Step 1. Click a control within a container.

Step 2. Click Control Rules.

Step 3. Click Add.

Step 4. Select an Action Type.

Step 5. Enter a Message to the user.

Step 6. Click Save.

Step 7. Click the Control.

Step 8. Click View.

Step 9. Click Edit Criteria.

Step 10. Click Add.

Step 11. Select values for the Criteria.

Step 12. Click Save.

Rule setup fields

Use this table as a quick reference.

Item	What it does	When to use it
Action Type	Controls what happens when criteria are met.	Use Error, Warning, Disable, or Hide based on the workflow.
Message	Text shown to the user.	Use for Error or Warning actions.
Criteria	Defines when the rule applies.	Use to target the rule to dates, values, or other conditions.

How to confirm it worked

1. The rule appears for the selected control.
2. The expected action occurs when criteria are met.
3. Users can save only when the rule allows saving.

Troubleshooting and common questions

Why does the rule not run?

Confirm the rule is attached to the correct control and the criteria match the test record.

Why can users still save?

A Warning action allows saving. Use Error when saving should not be allowed.

Related References

Document	Use it for
Custom Forms Menu Options	Menu options in Form Designer.
Form Designer Creating a Form	Creating a form.
Form Designer Activating a Form	Making a form available in provider domains and for users and user groups.