

Custom Control Setup

Purpose	Create and maintain custom control definitions that can be used on CAREWare custom tabs, service fields, subforms, and forms.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Administrative Options and Custom Fields.
Use this setup when	A new field definition is needed or to configure its data type, length, default value, validation, allowed values, or attachment settings.
Main warning	Plan the name and control type before the field is activated. Repurposing a control after it contains data can affect forms, reports, imports, and historical records.

Quick path

Administrative Options > Custom Features > Custom Fields > Custom Control Setup > Add

Before you begin

- Confirm the current provider or Central Administration domain in the top banner. Create the definition in the area that should manage it.
- Decide what the field must collect and choose the control type before entering settings.
- Use a clear, durable name and description. Avoid reusing an existing control for a different meaning.
- Prepare any drop-down values, URL, file extensions, maximum length, or default value that the control will need.

Important

- Create and test the control before it is used in production. A custom control definition does not automatically place the field on a tab or form; activation and placement are completed separately.
- Make sure the custom control name is significantly different from built in CAREWare field names. Example: Adding a service custom field called CD4 Count, because the client's lab result is relevant to services delivered. That could cause confusion as well as issues with reports.

Choose the right control type

The Control Type determines what users can enter and which settings appear. Choose the simplest control that accurately represents the data.

Control type	Use it for	Examples
Attachment	Uploading a file with defined extensions and size limits.	Referral document, signed form, supporting image
CheckBox	A true/false or yes/no condition.	Consent received; follow-up completed
ComboBox	One selection from a standardized list.	Status, category, assigned staff
DatePicker	A valid calendar date.	Review date, enrollment date, expiration date
Hyperlink	A web address that users can open.	External resource, secure portal, reference page
Memo	Longer narrative text.	Notes, explanation, free-text comments
TextBox	Short text or numeric entry.	Identifier, count, short label, phone extension

Decision tips

- Use a ComboBox instead of a CheckBox when you need more than two states, such as Yes, No, Unknown, and Not Applicable.
- Use a TextBox rather than a numeric TextBox for IDs, ZIP codes, phone numbers, or codes that may contain leading zeros or punctuation.
- Use a Memo for narrative information and a ComboBox for information that must be counted, grouped, or reported consistently.
- Use a DatePicker for dates instead of a text field so CAREWare can enforce a valid date format.

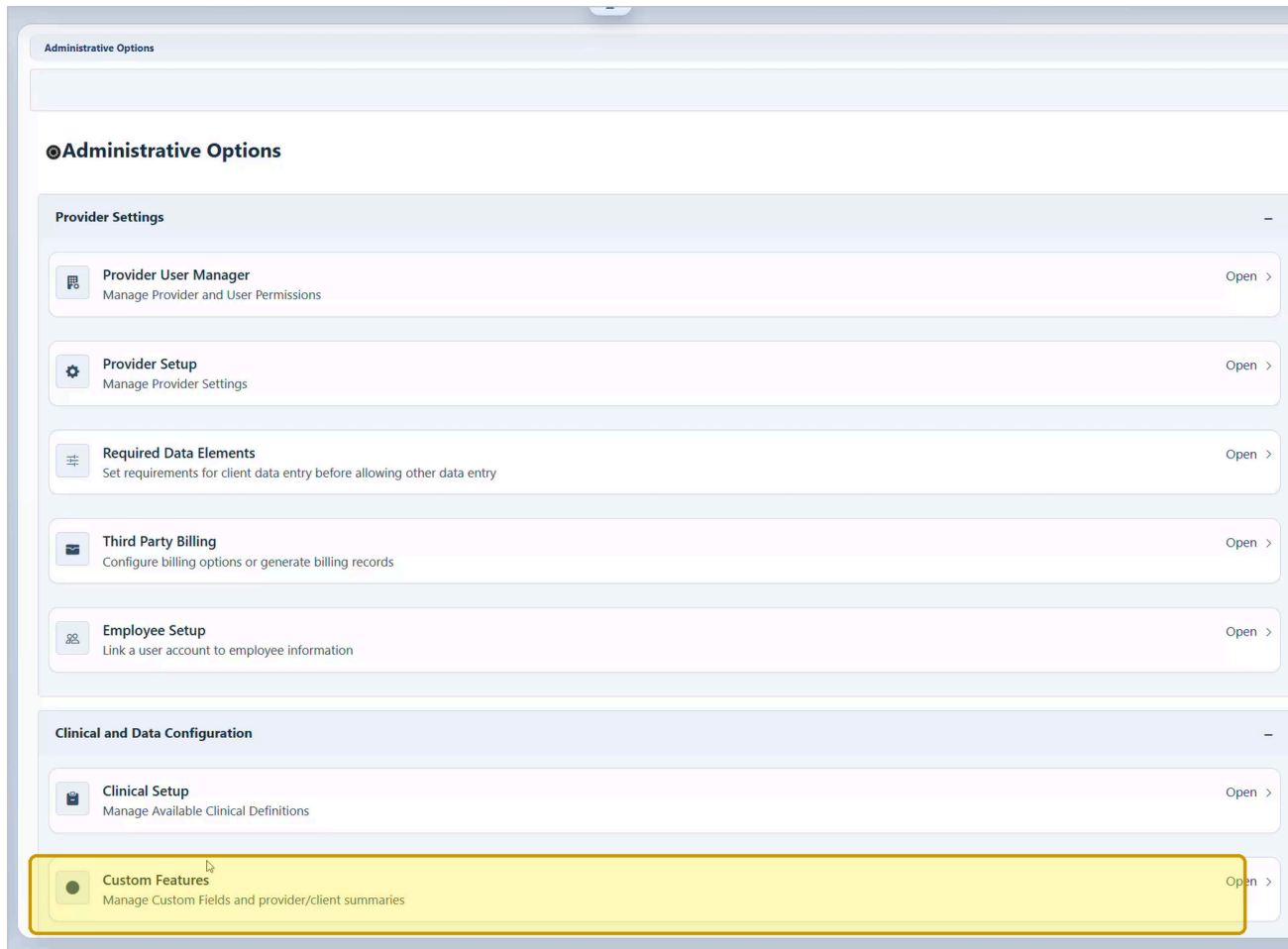
Important

- Required fields and default values affect every screen where the control is activated. Use Required only when the value applies to every workflow, and use a default only when it is reliably correct.
- Required fields affect imports as well. If a custom control is required for service entry it is also required for service imports.

Open Custom Control Setup

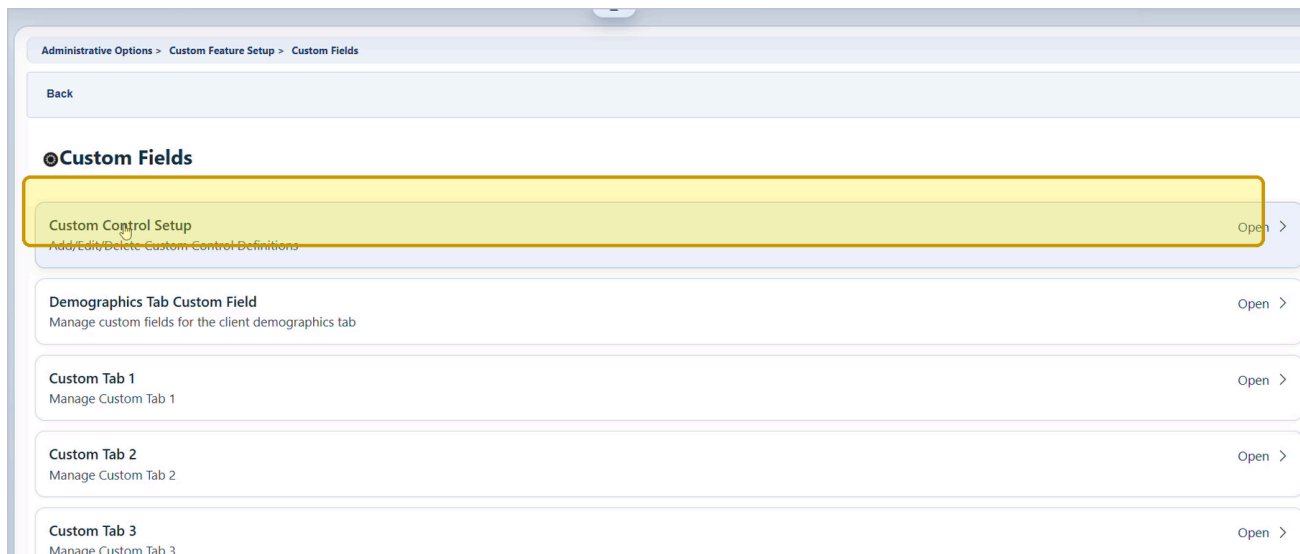
Step 1. Click Administrative Options.

Step 2. Click Custom Features.



Step 3. Click Custom Fields.

Step 4. Click Custom Control Setup.



Create the control definition

Step 5. On the Custom Control Setup list, click Add.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

View **Add** Delete Back Print or Export Column visibility ▼ Copy

Custom Control Setup

Search: « < 1 2 > » Go to page entries per page Showing 1 to 100 of 11

Name	Control Type	Description	Required
Family Planning Methods	ComboBox	Family Planning Methods	
Functional status	ComboBox	Functional status	
WHO Stage	ComboBox	WHO Stage	
Other treatment	CheckBox	Other treatment	
12-step self-help	CheckBox	12-step self-help	
Out-patient non-methadone	CheckBox	Out-patient non-methadone	
Residential treatment	CheckBox	Residential treatment	
Methadone	CheckBox	Methadone	

Step 6. Enter a Name and Description.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *:

Description *:

Control Type *: ▼

Numeric *: ☐

Required: ☐

Length *:

Default Value:

Mask Char:

Mask Length:

Mask From Left: ☒

Toggle Edit by Permission: ☐

Naming guidance

Do	Avoid
Use a concise name that will make sense on a form, report, or template.	Generic names such as "Status 2" or "Other Field."
Use the description to define the purpose and expected data.	Changing the meaning of a control after staff have entered data.
Use consistent capitalization and terminology across related controls.	Names that differ only by punctuation or spacing.

Select the control type and common settings

Step 7. Select the Control Type

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Hyperlink Custom Control

Description *: Description Hyperlink Custom Control

Control Type *: **Hyperlink**

Numerics *: Attachment

Required: CheckBox

Length *: ComboBox

Default Value: DatePicker

Mask Char: Memo

Mask Length: TextBox

Mask From Left: ☒

Toggle Edit by Permission: ☐

Settings that appear on several control types

Setting	What it does	Use with care
Required	Requires a value when the field is presented in a workflow that enforces required data.	Do not require a value that staff may be unable to obtain.
Default Value	Pre-populates the field with a starting value.	Defaults can create inaccurate data when users accept them without review.
Toggle Edit by Permission	Allows edit access to be controlled by permissions.	Verify the applicable roles and permissions before activation.

Step 8. Configure the type-specific settings, then click Save.

Important

After a control contains production data, do not change its meaning or replace it with a different data concept. Create a new control when the business meaning changes.

Configure a TextBox

A TextBox collects a single line of short text. Select Numeric only when CAREWare should accept the entry as a number only.

TextBox setting	Guidance
Numeric	Use for quantities or values that will be treated as numbers. Do not use for identifiers, ZIP codes, or phone numbers.
Length	Set the maximum number of characters needed. The video example sets a text length of 50.
Default Value	Enter only a value that is normally correct and safe to prefill.
Mask Char / Mask Length / Mask From Left	Use masking only when the displayed value must be partially obscured or formatted. Test it with realistic data before release.
Required	Select only if every applicable user can provide the value.

Tip

- A value may look numeric but still be an identifier. Keep it as text when leading zeros, letters, separators, or exact formatting must be preserved.
- If a text value is set as numeric, it cannot be changed later. A new control would have to be added to replace it, if it should not be a numeric text field.
- Once the length is set, it cannot be changed to a smaller value. If records were already saved with a longer field value, changing the length to a smaller value may cause errors in CAREWare.

Configure a ComboBox and its values

A ComboBox presents a controlled drop-down list. It is the best choice when users must select one value from a standardized set.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Combopbox

Description *: Description Combobox

Control Type *: ComboBox

Required: ☐

Default Value:

Activate Values Automatically: ☒

Toggle Edit by Permission: ☐

Step 9. Save the ComboBox.

Step 10. Click [Edit Values](#).

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Edit Edit Values Back

Custom Control Setup

Name *: Example Combopbox

Description *: Description Combobox

Control Type: ComboBox

Toggle Edit by Permission: ☐

Required: ☐

Activate Values Automatically: ☒

Step 11. Click Add.

Step 12. Enter a Code and a Value, then save.

Step 13. Repeat for each choice.

Step 14. Activate the values that should be available.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup > Combo Box Value Setup

Activate Deactivate Activate All Deactivate All View Add Edit Delete Back Print or Export Column visibility Copy

Combo Box Value Setup

Search: « < 1 > » Go to page 1 100 entries per page Showing 1 to 2 of 2 entries

Active	Code	Value	Owner
Yes	1	First Value	Default
Yes	2	Second Value	Default

Important

When a ComboBox value has already been used in client data, deactivate it instead of deleting it. Deactivation prevents new selection while preserving historical records.

ComboBox tips

- Use stable, unique codes. Do not recycle a code for a different meaning.
- Order and name choices so staff can distinguish them quickly.
- Use Activate Values Automatically only when newly added values should become available immediately.
- Avoid overlapping choices such as “Other,” “Unknown,” and “Not sure” unless each has a defined reporting purpose.

Configure CheckBox, DatePicker, and Memo controls

CheckBox

Use a CheckBox for a true/false condition. Write the field name so the meaning of a checked box is unambiguous—for example, “Consent received.”

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Checkbox Custom Control

Description *: Description Checkbox Custom Control

Control Type *: CheckBox

Required: ☐

Default Value:

Toggle Edit by Permission: ☐

Tip

A CheckBox cannot clearly represent Unknown, Not Asked, or Not Applicable. Use a ComboBox when you need those additional states.

DatePicker

Use a DatePicker for a calendar date.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Date Picker Custom Control

Description *: Description Date Picker Custom Control

Control Type *: DatePicker

Required: ☐

Default Value:

Toggle Edit by Permission: ☐

Memo

Use a Memo for longer narrative text, explanations, or comments.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Memo Custom Control

Description *: Description Memo Custom Control

Control Type *: Memo

Required: ☐

Default Value:

Toggle Edit by Permission: ☐

Data quality tip

Use structured controls for countable data; reserve Memo fields for longer notes.

Configure a Hyperlink

A Hyperlink stores a web address that users can open from CAREWare. Enter the complete destination in the URL field.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

Save Back

Custom Control Setup

Name *: Example Hyperlink Custom Control

Description *: Description Hyperlink Custom Control

Control Type *: Hyperlink

URL: HTTPS://jprog.happyfox.com/home

Default Value:

Hyperlink URL should start with http/https

Guideline	Why it matters
Begin the URL with lowercase http:// or https://.	Secure sites have a prefix of HTTPS
Use https:// whenever the destination supports it.	HTTPS protects the connection between the user and the destination site.
Open and verify the link before release.	Ensure the destination is correct or accessible.
Do not place credentials, tokens, or client identifiers in the URL.	Sensitive values can be exposed in browser history, logs, or shared links.

Configure an Attachment control

An Attachment control allows users to upload files. Define the permitted file types and a reasonable maximum length before the control is activated.

Setting	Guidance
File Types	Enter only the extensions your organization permits. The video example uses PDF;JPG;DOC;TXT. Follow the delimiter required by your CAREWare build.
Length	Set a maximum file length that aligns with server capacity and local policy. The video example displays 5000000.
Toggle Edit by Permission	Use permissions when only designated staff should add or change attachments.

Step 15. On the saved Attachment detail page, click **Edit Content Types**.

Step 16. Click **Add**.

Step 17. Enter the content type Name

Step 18. Select Universal and/or Secure according to local policy

Step 19. Click **Save**.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup > Content Type Setup

Save Cancel

Content Type Setup

Name:

Universal: ☐

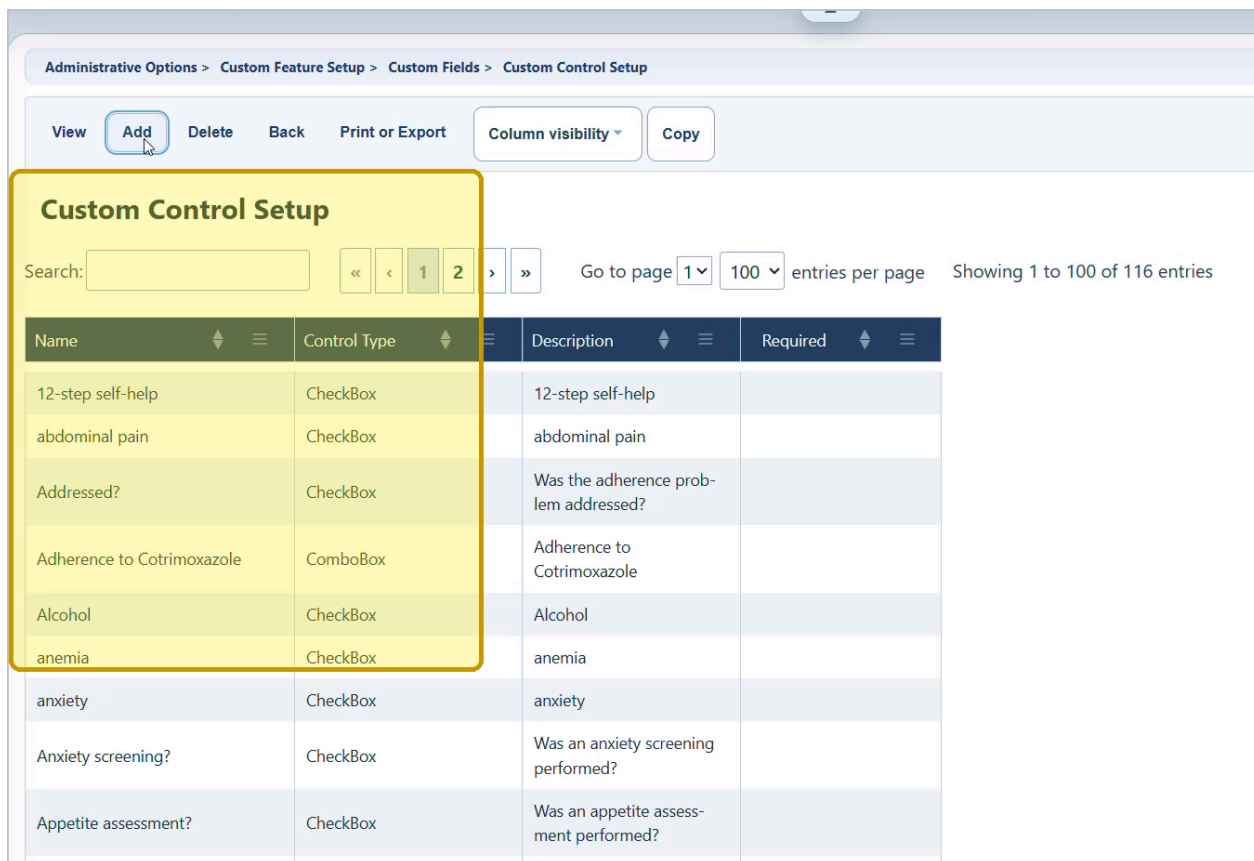
Secure: ☐

Important

Confirm the meaning and permission impact of Universal and Secure with your CAREWare administrator or security policy before production use. Do not allow file types that your organization cannot safely store or review.

Verify the control and make it available

Confirm the Control Name, Control Type, Description, and Required status.



Administrative Options > Custom Feature Setup > Custom Fields > Custom Control Setup

View Add Delete Back Print or Export Column visibility Copy

Custom Control Setup

Search: « < 1 2 > » Go to page 1 100 entries per page Showing 1 to 100 of 116 entries

Name	Control Type	Description	Required
12-step self-help	CheckBox	12-step self-help	
abdominal pain	CheckBox	abdominal pain	
Addressed?	CheckBox	Was the adherence problem addressed?	
Adherence to Cotrimoxazole	ComboBox	Adherence to Cotrimoxazole	
Alcohol	CheckBox	Alcohol	
anemia	CheckBox	anemia	
anxiety	CheckBox	anxiety	
Anxiety screening?	CheckBox	Was an anxiety screening performed?	
Appetite assessment?	CheckBox	Was an appetite assessment performed?	

To activate the custom control, click Back and then select the location the custom control should be active for.

Example: If this custom control should be a Custom Service Field, click Service Custom Fields and activate it there.

Final validation checklist

- Test the control with a non-production or test record when available.
- Confirm required behavior, default values, length limits, and permissions.
- For ComboBox controls, confirm the correct active values appear.
- For Hyperlink controls, open the link.
- For Attachment controls, test that the correct types of files can be uploaded and verify file-size behavior.
- Confirm reports, forms, or templates display the control as expected.

Helpful tips for reliable custom controls

Topic	Recommended practice
Plan before building	Write the field purpose, data owner, control type, valid values, and retention needs before creating it.
One meaning per control	Do not reuse an existing control for a new question simply because its type is convenient.
Required data	Require only information that is consistently available and necessary for the workflow.
Default values	Use defaults sparingly. A blank value is often safer than a value that could be accepted without verification.
Permissions	Use Toggle Edit by Permission for sensitive or controlled data, and test each relevant role.
Standardization	Use ComboBox values for data that must be reported consistently. Keep codes stable even when display wording is refined.
Field names	Choose names that remain understandable outside the original form, including in exports and reports.
Change management	Document who approved the control, when it was activated, and how future changes will be handled.

Before changing an existing control

- Check where the control is currently used.
- Determine whether it already contains client or service data.
- Review any reports, imports, exports, or form logic that depend on it.
- Create a replacement control rather than changing the original meaning.
- For a ComboBox, deactivate obsolete values instead of deleting used values.

Important

Changes that seem cosmetic—such as renaming a field or value—can affect training materials, report definitions, import templates, and staff workflows. Coordinate changes and test them before release.

Troubleshooting and common questions

Why can't I see Custom Control Setup?

Confirm that your user account has [permission](#) to access Administrative Options, Custom Features, and Custom Fields. Ask a local administrator to review permissions.

Why does Save fail?

Check required fields, TextBox Length, URL format, attachment extensions and length, and any validation message shown beside the field.

Why does my ComboBox have no choices?

Open the saved definition, click [Edit Values](#), add the Code and Value entries, and make sure the intended values are active.

Why does the new control not appear on a tab or form?

The control must also be activated in the appropriate custom field location.

Why is the Hyperlink rejected?

Enter the complete URL beginning with lowercase http:// or https:// and remove spaces before the scheme.

Why is an attachment rejected?

Confirm its extension or file type is allowed, the file is smaller than the configured maximum size allowed, the required content type exists, the user has permission to upload files, and the user has not exceeded the [File Quota](#) for daily uploads.

Why am I seeing the wrong provider's setup?

Verify if currently logged into Central Administration or a provider by checking in the top banner, then return to the correct provider before making changes.

Why does a renamed field not appear in another list?

Refresh the list using the [Resetting the Custom Field List](#) guide or contact Help Desk.

Related CAREWare guides and resources

Resource	Description
Edit Values	Manage ComboBox choices, including adding, editing, activating, and deactivating values.
Custom Field Templates	Use custom fields in CAREWare import and export templates.
Resetting the Custom Field List	Refresh the custom field list when a new or changed field is not displayed.
Provider User Manager	Instructions for adjusting permission groups and user accounts
File Quotas	Guide for understanding and adjusting limits for uploads and reports.