

Service Custom Fields

Purpose	Activate existing custom controls for service records and define whether each field applies to all services, selected service categories, or selected subservices.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Administrative Options and Custom Fields.
Use this setup when	You need to activate, scope, reorder, or deactivate custom fields used during service entry.
Main warning	Confirm the correct provider and activation scope. A required field can affect every selected service workflow and service import.
Video walkthrough	Service Custom Fields Video

Quick path

Administrative Options > Custom Features > Custom Fields > Service Custom Fields > select provider > Manage Selected Provider

Before you begin

- The custom control definition must already exist in [Custom Control Setup](#).
- Confirm whether the field should apply to all services, one or more service categories, or specific subservices.
- For a ComboBox, confirm that the intended values are active before staff begin data entry.
- Use a test or non-production record when available.

Important

Creating a custom control definition and activating it for services are separate tasks. Refrain from repurposing controls after they contain data; create a replacement when the business meaning changes.

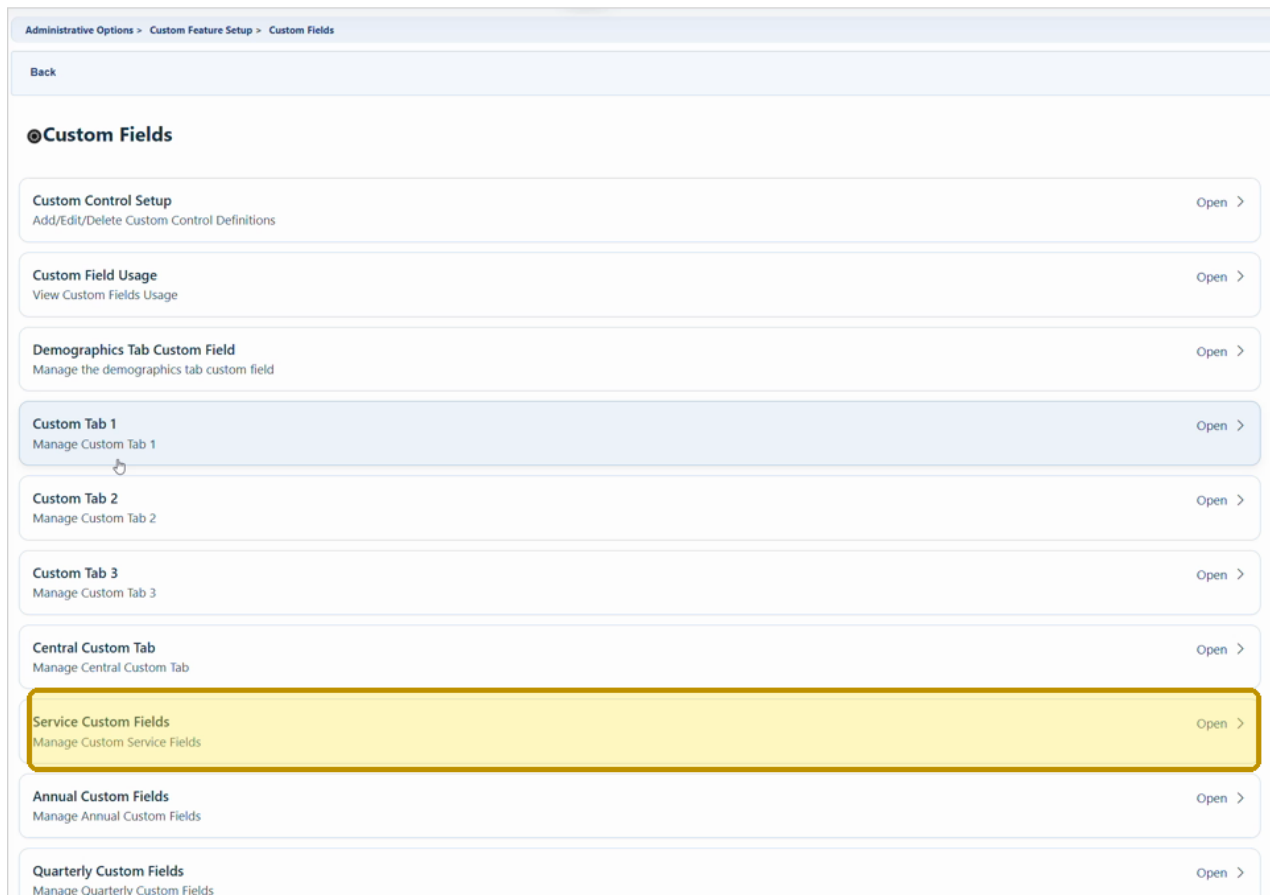
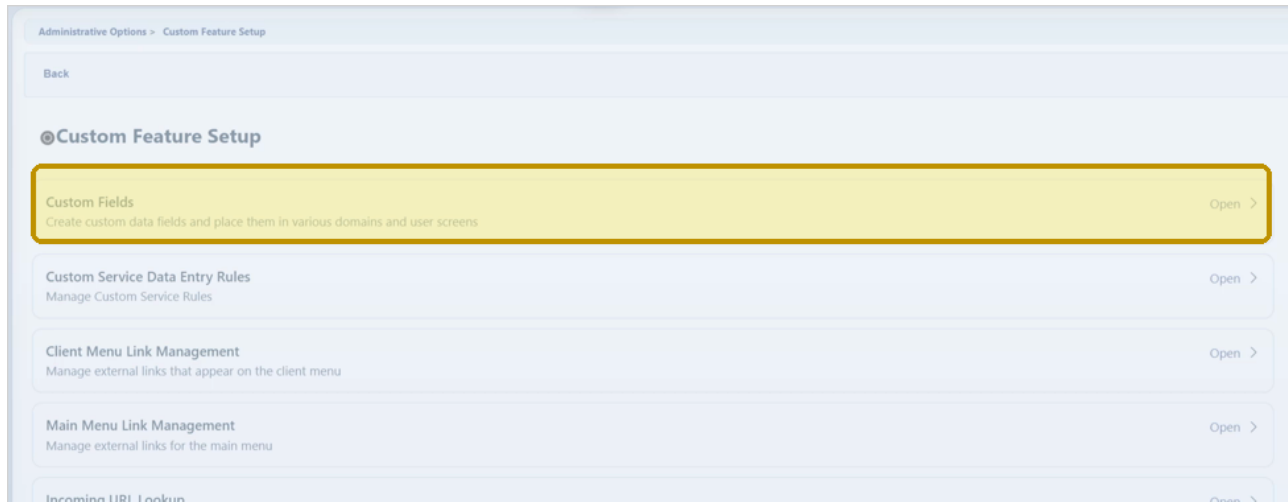
Open Service Custom Fields

Step 1. Click Administrative Options.

Step 2. Click Custom Features.

Step 3. Click Custom Fields.

Step 4. Click Service Custom Fields.



Select the provider

Step 5. In Central Administration, select the provider and click **Manage Selected Provider**. If you are already inside one provider, skip this step.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Service Setup

Manage Selected Provider Back Print or Export Column visibility Copy

Custom Service Setup

Search: « < 1 > » Go to page 1 100 entries per page Showing 1 to 3 of 3 entries

Select	Provider
☐	ADAP
☒	Default
☐	Test Provider

Important

Changes apply to the selected provider. Verify the provider before activating, deactivating, or reordering service custom fields.

Activate a field for all services

Step 6. Enter part of the control name or description in Search, then select the control.

Step 7. Click **Activate For All**.

Activate For All Activate By Category Activate By Subservice Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

Custom Control Setup

	Beneficiary Race	ComboBox	Beneficiary Race				Default
	Blue nails	CheckBox	Blue nails				Default
	Breathing difficulty	CheckBox	Breathing difficulty				Default

Active	Name	Control Type	Description	Service Category	Service Type	Position	Domain Name
Yes	12-step self-help	CheckBox	12-step self-help	ALL	ALL	0	Default
Yes	Blue nails	CheckBox	Blue nails	ALL	ALL	1	Default
	abdominal pain	CheckBox	abdominal pain				Default

Important

Use **Activate For All** only when the field is appropriate for every service. Required fields and default values apply wherever the control is active, including service imports.

Activate a field by service category

Step 8. Select the control and click Activate By Category.

Step 9. Select each service category where the field should appear, then click Save.

☐	HOPWA Supportive
☐	HOPWA TBRA
☐	HOPWA Transitional/Short Term
☐	HOPWA Transitional/Short Term Capital Development
☐	Hospice Services
☐	Housing Services
☐	Legal Services
☐	Linguistics Services
☐	Medical Case Management
☒	Medical Nutrition Therapy
☐	Medical Transportation Services
☐	Mental Health Services
☐	Non CARE Act Service
☐	Non-Medical Case Management Services
☐	Oral Health Care

Important

Select only categories that share the same data requirement. A field activated by category appears for every applicable subservice in that category.

Activate a field by subservice

Step 10. Select the control and click **Activate By Subservice**.

Step 11. Select each subservice where the field should appear, then click **Save**.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Service Setup > Custom Control Setup > Subservices for Test Attachment

Save Cancel Print or Export Column visibility Copy

Subservices for Test Attachment

Search: « < 1 > » Go to page 1 100 entries per page Showing 1 to 48 of 48 entries

Active	Service Category	Short Name	Long Name
☐	Outpatient/Ambulatory Health Services	A/O Medical	A/O Medical
☐	Outpatient/Ambulatory Health Services	A/O Medical Care	A/O Medical Care
☐	Medical Transportation Services	Advocacy	General Client Advocacy
☒	Medical Case Management	Applying tea leaves	Applying tea leaves/Ambulatory/Outpatient Medical Care
☐	Medical Case Management	BCM/RWB	BCM/RWB
☐	Medical Case Management	Brief Other Case Mgt	Brief Other Case Mgt/CMO
☐	AIDS Pharmaceutical Assistance	Copays	Copays
☐	ADAP Insurance	Copays1	Copays1
☐	Outpatient/Ambulatory Health	Copays2	Copays2

Tip

Use subservice activation when the field is needed only for a narrowly defined service workflow.

Review scope and field order

Step 12. Confirm **Active** displays **Yes** and review the **Service Category** and **Service Type** columns.

Step 13. Select an active field and click **Move Up** or **Move Down** until it appears in the preferred order.

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

Activate For All Activate By Category Activate By Subservice Deactivate Move Up Move Down Copy 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 125 entries

Active	Name	Service Type	Subcategory	Service Category	Service Type	Position	Default Value
Yes	12-step self-help	CheckBox	12-step self-help	ALL	ALL	0	Default
Yes	Blue nails	CheckBox	Blue nails	ALL	ALL	1	Default
Yes	ARV Adherence Assessment	ComboBox	ARV Adherence Assessment	Medical Nutrition Therapy		0	Default
Yes	Test Attachment	Attachment	Test Attachment	Applying tea leaves		0	Default
	abdominal pain	CheckBox	abdominal pain				Default
	Addressed?	CheckBox	Was the adherence problem addressed?				Default
	Adherence to Cotrimoxazole	ComboBox	Adherence to Cotrimoxazole				Default
	Alcohol	CheckBox	Alcohol				Default
	anemia	CheckBox	anemia				Default
	anxiety	CheckBox	anxiety				Default
	Anxiety screening?	CheckBox	Was an anxiety screening performed?				Default
	Appetite assessment?	CheckBox	Was an appetite assessment				Default

Service Custom Fields buttons

Button	What it does	When to use it
Activate For All	Activates the selected control for every service category and subservice.	Use only when the field applies to all service entry workflows.
Activate By Category	Opens the service category selection list.	Use when the field applies to all subservices in selected categories.
Activate By Subservice	Opens the subservice selection list.	Use when the field applies only to specific subservices.
Deactivate	Removes the selected activation from service entry.	Use to stop displaying the field without deleting its definition or historical data.
Move Up / Move Down	Changes the field position for its activation scope.	Use after activation to place fields in a logical entry order.
Back	Returns to the provider selection page.	Use when changing providers or leaving setup.
Print or Export	Opens options to print or export the grid.	Use for review, documentation, or change control.
Column visibility	Shows or hides grid columns.	Used to alter columns in list

Deactivate a service custom field

Step 14. Select the active field and click Deactivate.

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

Activate For All Activate By Category Activate By Subservice **Deactivate** Move Up Move Down Copy 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 125 entries

Active	Name	Control Type	Description	Service Category	Service Type	Position	Domain Name
Yes	12-step self-help	CheckBox	12-step self-help	ALL	ALL	0	Default
Yes	Blue nails	CheckBox	Blue nails	ALL	ALL	1	Default
Yes	ARV Adherence Assessment	ComboBox	ARV Adherence Assessment	Medical Nutrition Therapy		0	Default
Yes	Test Attachment	Attachment	Test Attachment		Applying tea leaves	0	Default
	abdominal pain	CheckBox	abdominal pain				Default
	Addressed?	CheckBox	Was the adherence problem addressed?				Default
	Adherence to Cotrimoxazole	ComboBox	Adherence to Cotrimoxazole				Default
	Alcohol	CheckBox	Alcohol				Default
	anemia	CheckBox	anemia				Default

Important

Deactivation does not delete the custom control definition or historical service data. Review reports, imports, exports, forms, and staff workflows before changing an existing control.

How to confirm it worked

- Open service entry for a test client in the selected provider and choose a service within the configured scope.
- Confirm the field appears in the intended order and does not appear for services outside the selected scope.
- Verify required behavior, default values, length limits, [permissions](#), and active ComboBox values.
- For an Attachment control, verify permitted file types, file size, content type, and upload [permissions](#).

Helpful data-quality tips

- Use a ComboBox for standardized values that must be counted, grouped, or reported consistently.
- Use a DatePicker for dates and keep identifiers as text when leading zeros or punctuation must be preserved.
- Use default values sparingly; a blank value is safer than an incorrect value accepted without review.
- Use an attachment custom control if documents need to be uploaded and attached to the service.

Important

Changes that appear cosmetic, including renaming a field or value, can affect training materials, custom field templates, reports, imports, and staff workflows. Coordinate and test changes before release.

Troubleshooting and common questions

Why does the field appear for the wrong services?

Review the Service Category and Service Type columns. Deactivate the incorrect activation, then activate the field again using the correct scope.

Why does service entry or an import fail?

Review whether the custom field is Required, whether a valid value was supplied, and whether the field is active for the imported service scope.

Why does a ComboBox have no choices?

Open Custom Control Setup, click [Edit Values](#), add or review the values, and activate the intended choices.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Add or edit custom controls to be activated as service custom fields
Edit Values	Add drop down list items to combobox custom controls
Subservice Manager	Create and maintain the subservices used for subservice-scoped activation.
Manage User Groups	Change user permissions by group