

Eligibility Custom Fields

Purpose	Activate and organize existing custom controls for eligibility records and choose whether each field appears for all records, eligibility starts, or eligibility stops.
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, deactivate, reorder, or limit an eligibility custom field to Start Only or Stop Only for a provider.
Main warning	Confirm the correct provider and activation scope before making changes. Eligibility custom fields affect data collection for that provider.
Video walkthrough	Eligibility Custom Fields Video

Quick path

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

Before you begin

- The custom control definition must already exist in [Custom Control Setup](#).
- Confirm whether you are working in Central Administration or inside a provider, and verify the provider shown in the top banner.
- Decide whether the field belongs on all [eligibility](#) records, Start Only (Active for Yes), or Stop Only (Active for No), and determine its order.
- Use a test or non-production record when available.

Important

Creating a custom control definition and activating it for eligibility are separate tasks. Do not repurpose a control after it contains data; create a replacement when the business meaning changes.

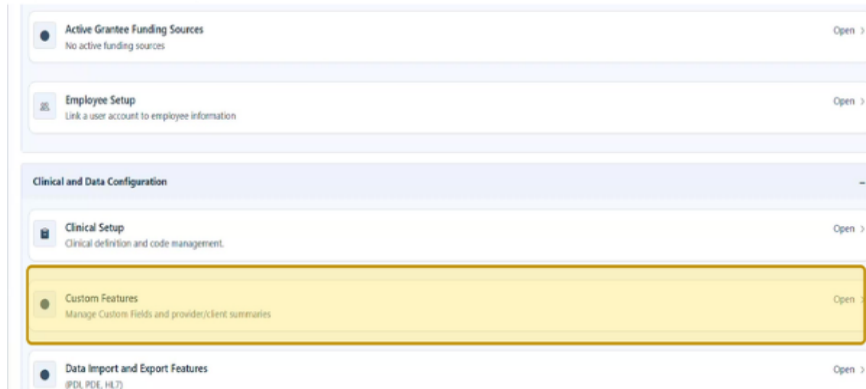
Open Eligibility Custom Fields

Step 1. Click Administrative Options.

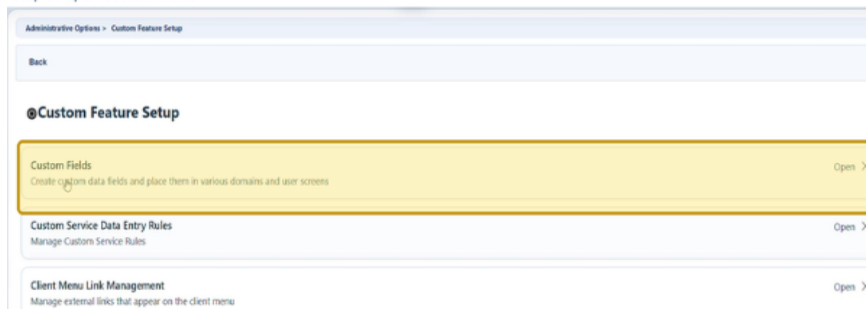
Step 2. Click Custom Features.

Step 3. Click Custom Fields.

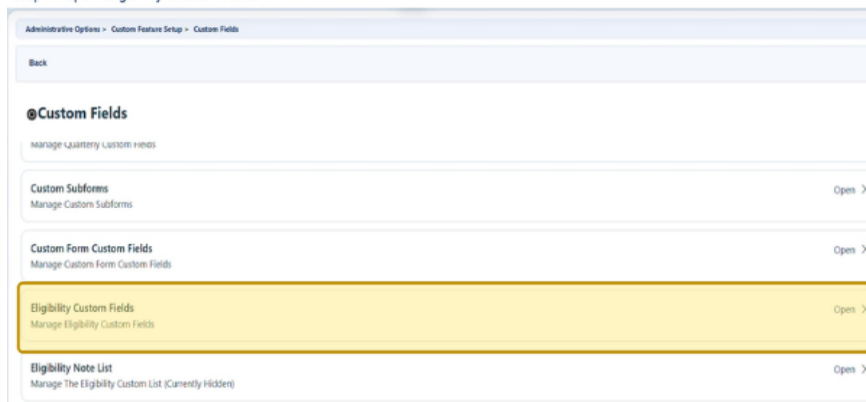
Step 4. Click Eligibility Custom Fields.



Step 3: Open Custom Fields



Step 4: Open Eligibility 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.

Step 5: Select the provider, then click Manage Selected Provider

Administrative Options > Custom Feature Setup > Custom Fields > Custom Eligibility Setup

Manage Selected Provider Back Print or Export Column visibility Copy

Custom Eligibility 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, reordering, or changing the field scope.

Activate a field

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

Step 7. Select the control you want to activate.

Steps 6-7: Search, select the control, and choose an activation action

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

Activate Start Only Stop Only Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

Custom Control Activation

Search: test < 1 > Go to page 1 100 entries per page Showing 1 to 4 of 4 entries (filtered from 125 total entries)

Active	Active for Yes	Active for No	HOPWA	Name	Control Type	Description
				Example Text Custom Control	TextBox	Description of Example Test Custom Control
				Test Attachment	Attachment	Test Attachment
				Test Numeric Custom Field	TextBox	Test Numeric Custom Field
				Test Text Field	TextBox	Test Text Field

Step 8: Confirm Active, Active for Yes, or Active for No

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

Activate Start Only Stop Only Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

Custom Control Activation

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Active	Active for Yes	Active for No	HOPWA	Name	Control Type	Description
Yes				Example Text Custom Control	TextBox	Description of Example Test Custom Control
	Yes			Test Attachment	Attachment	Test Attachment
		Yes		Test Numeric Custom Field	TextBox	Test Numeric Custom Field
				Test Text Field	TextBox	Test Text Field

Step 8. Choose the applicable activation option.

Choose the eligibility scope

Use the option that matches when the field should appear:

- Activate: show the field for eligibility records without limiting it to one status.
- Start Only: show the field when Is Eligible = Yes; the grid displays Active for Yes.
- Stop Only: show the field when Is Eligible = No; the grid displays Active for No.
- Confirm the scope in the Active, Active for Yes, or Active for No column.

Step 9. Select an active field and click Move Up or Move Down until it is in the preferred order.

Before: select the field and click Move Up or Move Down

After: verify the preferred order

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

Activate Start Only Stop Only Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

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	Yes			Test Attachment	Attachment	Test Attachment
		Yes		Test Numeric Custom Field	TextBox	Test Numeric Custom Field
				Test Text Field	TextBox	Test Text Field

Important

Required fields and default values affect every eligibility workflow where the control appears. Use Required only when staff can reliably provide the value.

Custom Eligibility Control Activation buttons

Button	What it does	When to use it
Activate	Makes the selected control active without limiting it to start or stop.	Collect the field for both eligibility states.
Start Only	Sets Active for Yes.	Collect the field when starting eligibility or Is Eligible = Yes.
Stop Only	Sets Active for No.	Collect the field when stopping eligibility or Is Eligible = No.
Deactivate	Removes the field from eligibility entry while retaining its definition and history.	Stop new entry without deleting the control definition.
Move Up / Move Down	Changes the field position in the eligibility workflow.	Place active fields in a logical order.
Search	Filters controls by name or description.	Find a control quickly.
Back	Returns to the provider selection page.	Change providers or leave setup.
Print or Export	Opens options to print or export the grid.	Review or document the configuration.
Column visibility	Shows or hides grid columns.	Simplify the grid or check activation status columns.

Deactivate a field

Step 10. Select the active field and click Deactivate.

Important

Deactivating an eligibility field does not delete the control definition or historical data. Before changing an existing control, review reports, imports, exports, forms, and staff workflows that depend on it.

How to confirm it worked

- Open a test client and eligibility record for the selected provider; confirm the field appears in the intended order.
- Confirm required behavior, default values, length limits, and edit permissions.
- For Start Only, confirm the field appears when Is Eligible = Yes.
- For Stop Only, confirm the field appears when Is Eligible = No.
- For Activate, confirm the field is not limited to one eligibility status.

Helpful data-quality tips

- Use a ComboBox for standardized values that must be counted, grouped, or reported consistently.
- Use a DatePicker for dates so CAREWare can enforce a valid date format.
- Keep identifiers, ZIP codes, and phone numbers 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.
- Choose durable field names that remain understandable in reports, exports, and templates.
- For an obsolete ComboBox choice that has been used in data, deactivate the value instead of deleting it.

Troubleshooting and common questions.

Why does the field appear for the wrong eligibility status?

Check the Active, Active for Yes, and Active for No columns. Select the field and apply Activate, Start Only, or Stop Only as appropriate.

Why does an active field not appear on the eligibility record?

Confirm the correct provider and eligibility status, verify the field order, refresh the record, and test with a record in that provider.

Why can't a user edit the field?

Review Toggle Edit by Permission and the [user's permission group](#). Test each applicable role before production use.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain control definitions before activating them for eligibility.
Eligibility	Review the client eligibility workflow where these fields appear.
Edit Values	Manage ComboBox choices, including adding, activating, and deactivating values.
Resetting the Custom Field List	Refresh custom field lists when a new or changed control is not displayed.
Custom Field Templates	Use custom fields in CAREWare import and export templates.
Provider User Manager	Review or adjust permission groups and user access.