Custom Client Tab

Purpose	Configure a provider's Custom Tab 1, 2, or 3, including the tab name, data entry mode, active custom controls, order, search behavior, and Rapid Entry visibility.
Who should do this	CAREWare administrators, data managers, or designated staff with access to Administrative Options and Custom Fields.
Use this guide when you need to	Create, rename, hide, make read-only, or update the controls displayed on a custom client tab.
Main warning	A control may already be assigned to another custom tab. Move or reuse it only after confirming the change will not disrupt an existing workflow.
Video walkthrough	Custom Client Tab video

Quick path
Administrative Options > Custom Features > Custom Fields > Custom Tab 1, Custom Tab 2, or Custom Tab 3 > select provider > Manage Selected Provider

Before you begin

- Create the needed control definitions in Custom Control Setup before activating them on a client tab.
- Confirm the provider or Central Administration domain shown in the top banner.
- Decide the tab name, data entry mode, control order, search fields, and Rapid Entry fields before making changes.
- Review whether a control is already active on another custom tab.

Important
A custom control must be activated on a custom client tab for it to appear. Activation and placement are completed separately. Refrain from repurposing controls after they contain production data; create a new control when the business meaning changes.

Choose the data entry mode

The Data Entry Mode controls whether the tab is visible and whether users can edit its fields.

Mode	What it does	Use it when
Hidden	Removes the tab from the client record menu.	The tab is not ready for use or should be temporarily unavailable.
Normal Data Entry	Displays the tab and allows editing subject to the user's permissions.	Staff must enter or update information on the tab.
Read Only	Displays the tab without allowing normal data entry.	Staff should view the information but not change it from the tab.

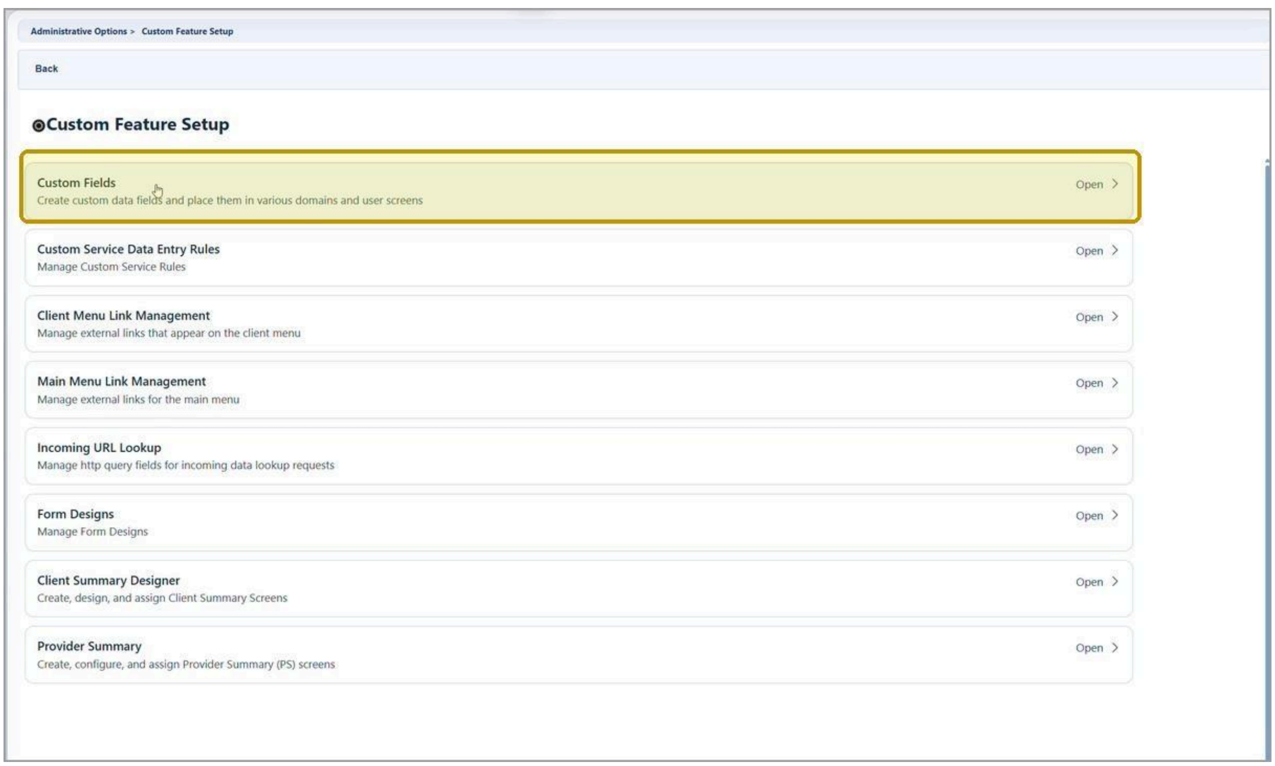
Tip

Use a concise, durable tab name that remains understandable in training, reports, templates, and staff workflows. Coordinate name changes before release.

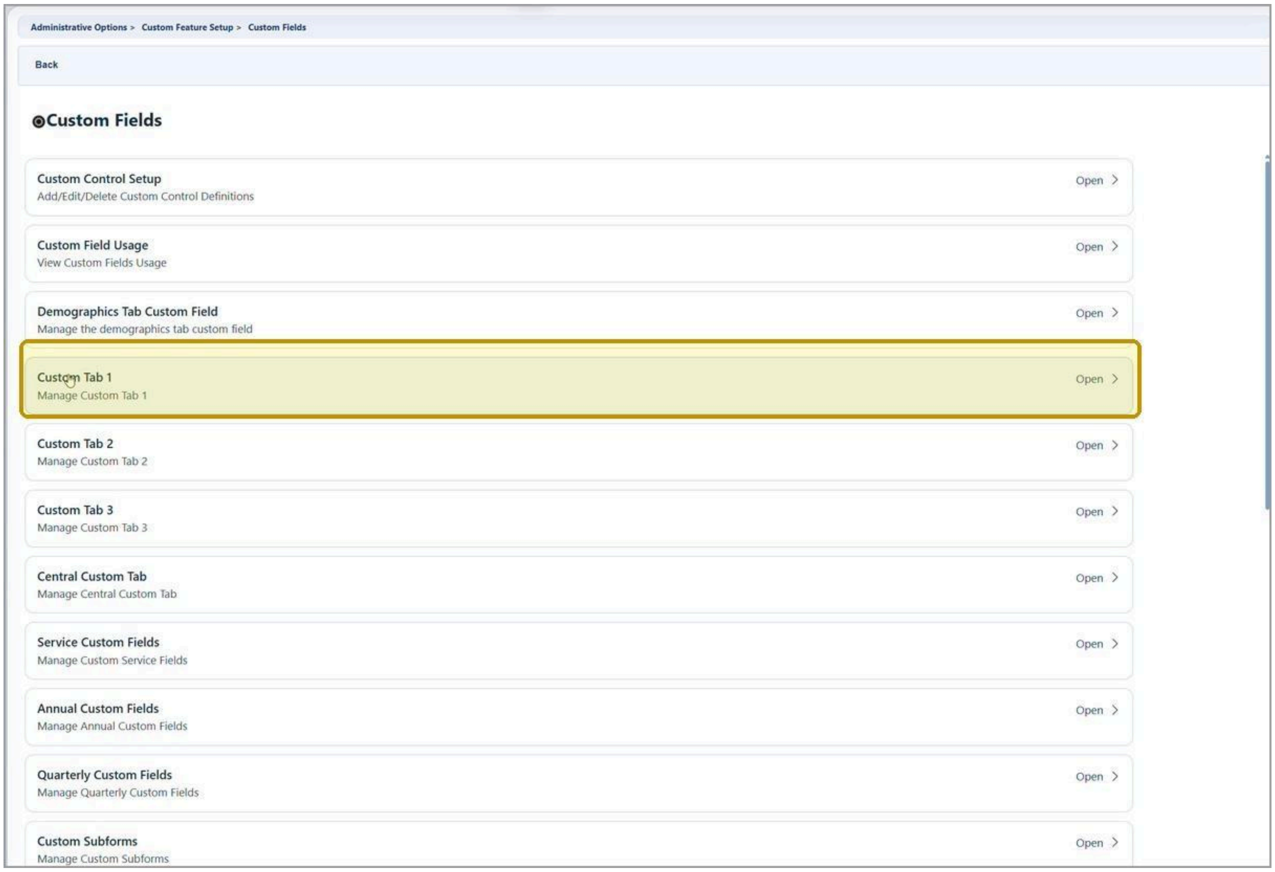
Open the Custom Client Tab setup

Step 1. **Click Administrative Options, then click Custom Features.**

Step 2. **Click Custom Fields.**

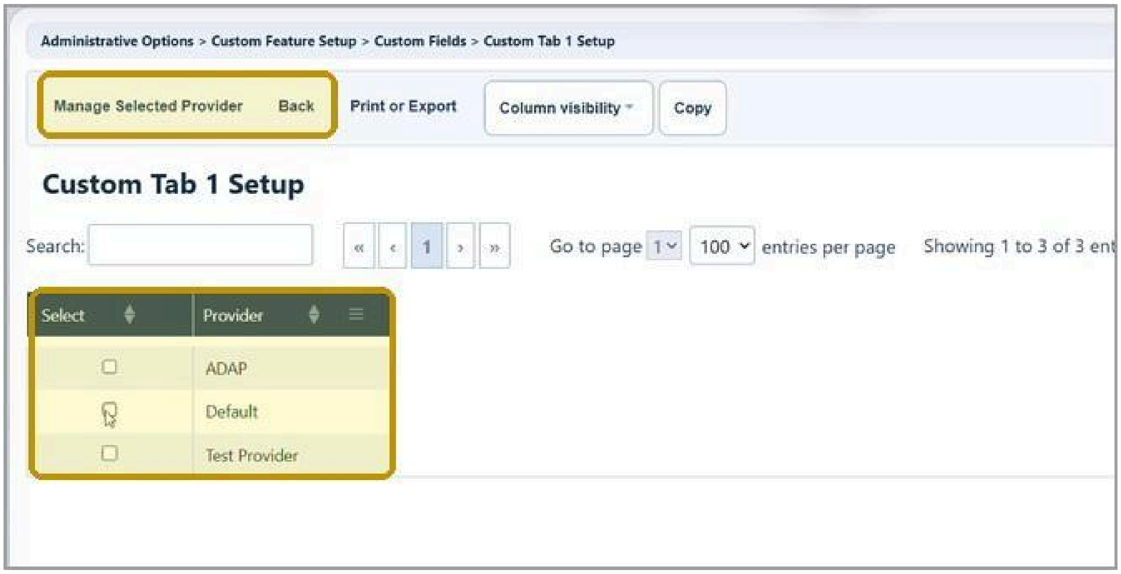


Step 3. **Click Custom Tab 1, Custom Tab 2, or Custom Tab 3.**



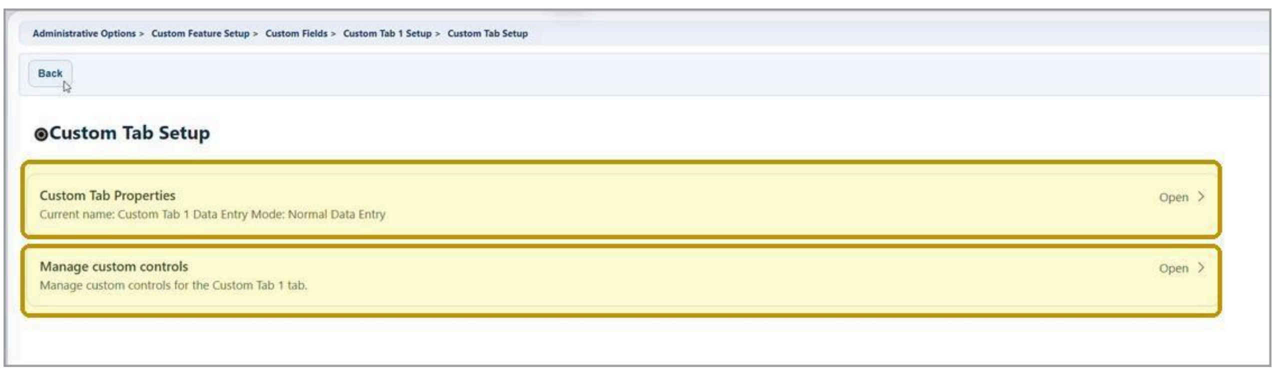
Select the provider and open the tab settings

Step 4. In Central Administration, select the provider and click Manage Selected Provider. Inside a provider, skip this step.



Step 5. Open Custom Tab Properties to change the tab name or data entry mode.

Step 6. Open Manage custom controls to activate, remove, or arrange fields.



Important

Make provider-specific changes in the intended provider. Confirm the top banner and selected provider before saving.

Name the tab and select its mode

Step 7. Open Custom Tab Properties, then click Edit.

Step 8. Enter the Custom Tab Name and select the Data Entry Mode.

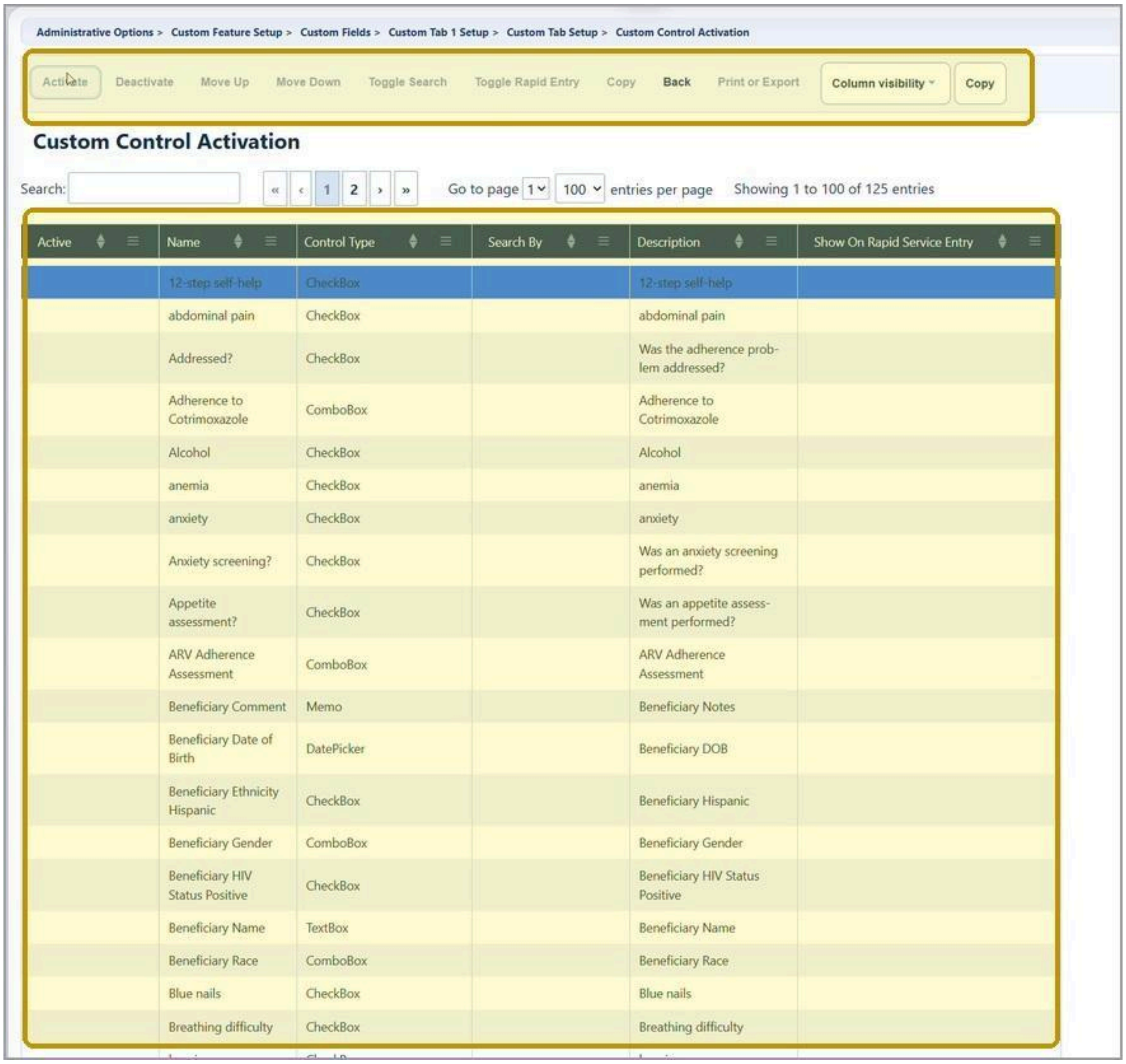
Step 9. Click Save.

Activate custom controls

Step 10. Open Manage custom controls.

Step 11. Select a control and click Activate.

Step 12. Repeat for each control that should appear on the tab.



Active	Name	Control Type	Search By	Description	Show On Rapid Service Entry
	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?	
	ARV Adherence Assessment	ComboBox		ARV Adherence Assessment	
	Beneficiary Comment	Memo		Beneficiary Notes	
	Beneficiary Date of Birth	DatePicker		Beneficiary DOB	
	Beneficiary Ethnicity Hispanic	CheckBox		Beneficiary Hispanic	
	Beneficiary Gender	ComboBox		Beneficiary Gender	
	Beneficiary HIV Status Positive	CheckBox		Beneficiary HIV Status Positive	
	Beneficiary Name	TextBox		Beneficiary Name	
	Beneficiary Race	ComboBox		Beneficiary Race	
	Blue nails	CheckBox		Blue nails	
	Breathing difficulty	CheckBox		Breathing difficulty	

Important

If CAREWare displays “The field is already activated for another Custom Tab,” stop and confirm where the field is currently used. Deactivate it from the other tab only when the move is intentional.

Activated controls display Yes in the Active column and move to the top of the list.

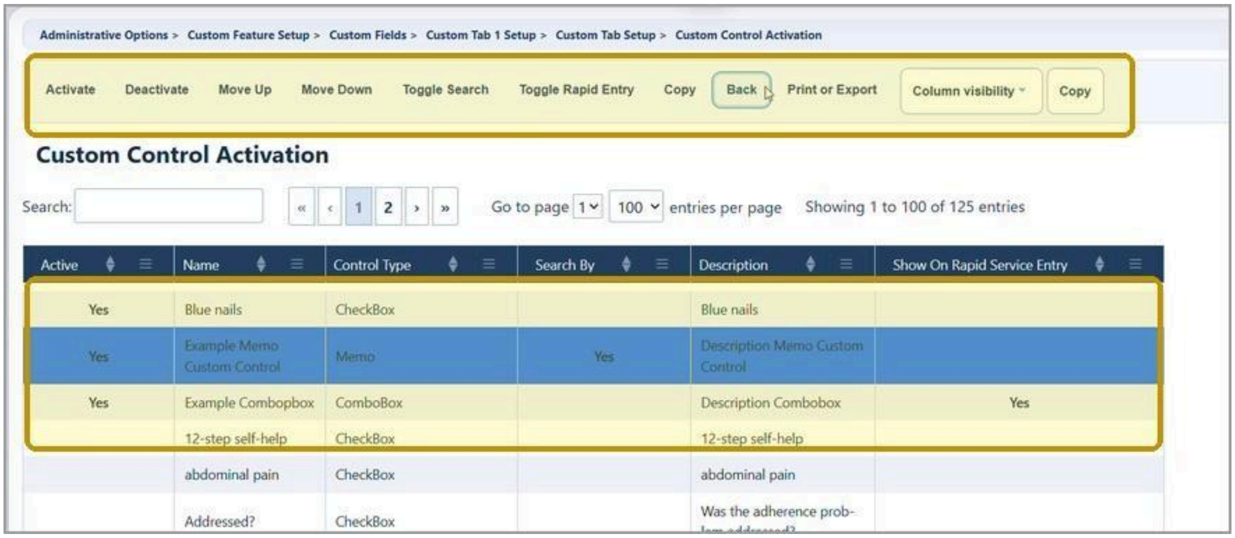
Arrange controls and configure optional behavior

Step 13. **Select an active control and use Move Up or Move Down to set its display order.**

Step 14. **Use Toggle Search only for fields that should help staff [find clients](#).**

Step 15. **Use Toggle Rapid Entry only for fields that should appear during [Rapid Service Entry](#).**

Step 16. **To remove a field from the tab, select the active control and click Deactivate.**



Custom Control Activation buttons

Button	What it does	Use with care
Activate	Adds the selected control to the custom client tab.	A control may only be active in one custom client tab location at a time.
Deactivate	Removes the control from this tab.	Confirm the field is not required by the current workflow.
Move Up / Move Down	Changes the order of active controls.	Keep related fields together and use a logical entry order.
Toggle Search	Adds or removes the field as a client search option.	Use only fields that reliably identify or narrow client results.
Toggle Rapid Entry	Shows or hides the field in Rapid Service Entry.	Limit the screen to fields needed during rapid entry.
Back	Returns to Custom Tab Setup.	Use after reviewing the active fields and options.

Tips for reliable custom client tabs

Topic	Recommended practice
Plan before activation	Document the tab purpose, data owner, control types, valid values, order, permissions, and retention needs.
One meaning per control	Do not reuse an existing control for a different question. Create a replacement control when the meaning changes.
Required fields	Require only information that is consistently available and necessary for the workflow. Required settings apply wherever the control is activated. This affects imports as well.
Default values	Use defaults sparingly. A blank value is safer than a value staff may accept without verification.
Countable data	Use ComboBox or other structured controls for information that must be grouped, counted, or reported consistently.
Narrative data	Use Memo for longer notes and explanations.
Identifiers	Use a text TextBox for IDs, ZIP codes, phone numbers, or codes that may contain leading zeros or punctuation.
Dates	Use DatePicker instead of free text so CAREWare can enforce a valid date format.
ComboBox values	Use stable codes and deactivate used values instead of deleting them.
Permissions	Test each relevant role, especially when Toggle Edit by Permission is enabled on a control.

Important
Changes that seem cosmetic, including renaming a tab, control, or ComboBox value, can affect training materials, reports, imports, exports, templates, and staff workflows. Coordinate and test changes before release.

Troubleshooting and common questions

Why can't I see Custom Tab 1, 2, or 3?

Confirm your account has permission to access Administrative Options, Custom Features, and Custom Fields. Also confirm the tab is not set to Hidden.

Why can't I activate a control?

The control may already be active on another custom tab. Review the warning, confirm the existing location, and move it only when intended.

Why is the tab visible but users cannot edit it?

Check whether the Data Entry Mode is Read Only and review the user permissions associated with the control.

Why does a ComboBox have no choices?

Open the control in Custom Control Setup, click Edit Values, and add or activate the intended values.

Related CAREWare guides and resources

Resource	Description
Edit Values	Manage ComboBox choices, including adding, editing, activating, and deactivating values.
Custom Field Templates	Use active custom client fields in import and export templates.
Resetting the Custom Field List	Refresh the custom field list when new or changed fields are not displayed.
Find Client	Search for clients using standard identifiers and configured custom fields.
Importing Custom Data Using the Provider Data Import	Prepare templates and import data into active custom fields.
Custom Control Setup	Instructions for adding custom controls to the list
Manage User Groups	Update user permissions by group
Group Rapid Entry	Add services for multiple clients at once