

Demographics Tab Custom Field

Purpose	Activate existing custom controls on a provider's client Demographics tab and configure where those controls are available.
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 expose a demographics custom field in Find Client, Rapid Entry, or Add Client.
Main warning	Confirm the correct provider before making changes. Activation and optional display settings affect staff workflows for that provider.
Video walkthrough	Demographics Tab Custom Field Video

Quick path

Administrative Options > Custom Features > Custom Fields > Demographics Tab Custom Field > 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 the field order and whether the field should also appear in [Find Client](#), [Rapid Service Entry](#), or [Add Client](#).
- Use a test or non-production record when available.

Important

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

Open Demographics Tab Custom Field

Step 1. Click Administrative Options.

Step 2. Click Custom Features.

Step 3. Click Custom Fields.

Step 4. Click Demographics Tab Custom Field.

Step 1-2: Administrative Options > Custom Features

Clinical and Data Configuration

- Clinical Setup**
Clinical definition and code management. [Open >](#)
- Custom Features**
Manage Custom Fields and provider/client summaries. [Open >](#)
- Data Import and Export Features**
(PDI, PDE, HL7) [Open >](#)

Step 3: Custom Fields

Custom Feature Setup

- Custom Fields**
Create custom data fields and place them in various domains and user screens. [Open >](#)
- Custom Service Data Entry Rules**
Manage Custom Service Rules [Open >](#)

Step 4: Demographics Tab Custom Field

- Custom Field Usage**
View Custom Fields Usage [Open >](#)
- Demographics Tab Custom Field**
Manage the demographics tab custom field. [Open >](#)
- Custom Tab 1**
Manage Custom Tab 1 [Open >](#)

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.

Expected result: The Custom Demographics Control Activation page opens for the selected provider.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Demographics Field

Manage Selected Provider Back Print or Export Column visibility Copy

Custom Demographics Field

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 made here apply to the selected provider. Verify the provider before activating, deactivating, or reordering fields. If these changes are made in the provider instead of Central Administration, these changes only affect the provider the user is logged into.

Activate and place a field

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

Step 7. Select the control, then click Activate.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Demographics Field > Custom Demographics Control Activation

Activate Deactivate Move Up Move Down Toggle Search Toggle Rapid Entry Toggle Client Add Toggle Duplicate Warning Copy Back Print or Export Column visibility Copy

Custom Demographics Control Activation

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

Active	Name	Control Type	Search By	Description	Show On Rapid S...	Include on Add C...	Warn about dupl...
	Beneficiary Date of Birth	DatePicker		Beneficiary DOB			
	Custom Subform Date	DatePicker		Custom Subform Date			
	Eligibility End Date	DatePicker		Eligibility End Date			
	Example Date Picker Custom Control	DatePicker		Description Date Picker Custom Control			

Administrative Options > Custom Feature Setup > Custom Fields > Custom Demographics Field > Custom Demographics Control Activation

[Activate](#)
[Deactivate](#)
[Move Up](#)
[Move Down](#)
[Toggle Search](#)
[Toggle Rapid Entry](#)
[Toggle Client Add](#)
[Toggle Duplicate Warning](#)
[Copy](#)
[Back](#)
[Print or Export](#)
[Column visibility](#)
[Copy](#)

Custom Demographics Control Activation

Search: x « 1 » Go to page 1 100 entries per page Showing 1 to 4 of 4 entries (filtered from 125 total entries)

Active	Name	Control Type	Search On	Show On Rapid Service Entry	Include on Add Client	Warn about duplicate values
Yes	Eligibility End Date	DatePicker		Eligibility End Date		
	Beneficiary Date of Birth	DatePicker		Beneficiary DOB		
	Custom Subform Date	DatePicker		Custom Subform Date		
	Example Date Picker Custom Control	DatePicker		Description Date Picker Custom Control		

Step 8. Select the active control and click Move Up or Move Down until it appears in the preferred order.

Configure optional locations

Step 9. Select an active field and use the applicable toggle buttons:

- Toggle Search: allow the field to be used on [Find Client](#).
- Toggle Rapid Entry: display the field on [Rapid Service Entry](#).
- Toggle Client Add: display the field during [Add Client](#).
- Toggle Duplicate Warning: warn when the same TextBox value is entered for another client.

Administrative Options > Custom Feature Setup > Custom Fields > Custom Demographics Field > Custom Demographics Control Activation

[Activate](#)
[Deactivate](#)
[Move Up](#)
[Move Down](#)
[Toggle Search](#)
[Toggle Rapid Entry](#)
[Toggle Client Add](#)
[Toggle Duplicate Warning](#)
[Copy](#)
[Back](#)
[Print or Export](#)
[Column visibility](#)
[Copy](#)

Custom Demographics Control Activation

Search: « 1 2 » Go to page 1 100 entries per page Showing 1 to 100 of 125 entries

Active	Name	Control Type	Search On	Show On Rapid Service Entry	Include on Add Client	Warn about duplicate values
Yes	12-step self-help	CheckBox		12-step self-help		
Yes	EPIC MRN	TextBox	Yes	EPIC MRN		
Yes	Test Numeric Custom Field	TextBox		Test Numeric Custom Field	Yes	
Yes	Eligibility End Date	DatePicker		Eligibility End Date	Yes	
Yes	ARV Adherence Assessment	ComboBox		ARV Adherence Assessment		
Yes	Example Attachment Custom Control	Attachment		Description Attachment Custom Control		
	abdominal pain	CheckBox		abdominal pain		
	Addressed?	CheckBox		Was the adherence problem addressed?		

Important

Enable optional locations only when they support the workflow. Required fields and default values affect every screen where the control is active; required custom fields can also affect imports.

Important

Toggle Duplicate Warnings only works for textbox type custom controls.

Custom Demographics Control Activation buttons

Button	What it does	When to use it
Activate	Adds the selected control to the provider's Demographics tab.	Use for a field that should appear on the client record.
Deactivate	Removes the selected control from the Demographics tab.	Use to stop displaying the field without deleting its definition.
Move Up / Move Down	Changes the field's position on the client record.	Use after activation to place the field in a logical order.
Toggle Search	Turns availability on Find Client on or off.	Use only when staff need to search for clients by this field.
Toggle Rapid Entry	Turns display on Rapid Service Entry on or off.	Use for information needed during rapid service entry.
Toggle Client Add	Turns display on Add Client on or off.	Use when the value should be collected during client creation.
Toggle Duplicate Warning	Turns duplicate-value checking on or off.	TextBox controls only. Use for identifiers that should be unique.
Back	Returns to the provider selection page.	Use when changing providers or leaving the 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.	Use to simplify the list or display optional settings.

Deactivate a field

Step 10. Select the active field and click Deactivate.

Important

Deactivating a field from the Demographics tab does not delete the control definition or historical data. Before changing an existing control, review where it is used and whether reports, imports, exports, forms, or staff workflows depend on it.

How to confirm it worked

- Open a test client record for the selected provider and confirm the field appears on the [Personal Info](#) tab in the expected order.
- Confirm required behavior, default values, length limits, and edit permissions.
- If Toggle Search is enabled, confirm the field appears on Find Client.
- If Toggle Rapid Entry is enabled, confirm the field appears during Rapid Service Entry.
- If Toggle Client Add is enabled, confirm the field appears during Add Client.
- For a ComboBox, confirm that only the intended active values are available.

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 client data, deactivate the value instead of deleting it.

Important

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

Troubleshooting and common questions

Why can't I see Demographics Tab Custom Field?

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

Why is the provider missing or the wrong provider displayed?

Check the top banner, return to the provider selection page, and select the correct provider before continuing.

Why is the control not listed?

Confirm that the control definition exists in the correct provider or Central Administration domain. Refresh the list using the Resetting the Custom Field List guide when appropriate.

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

Confirm the correct provider, verify that Active displays Yes, check the field order, refresh the client record, and test with a record in that provider.

Why did Duplicate Warning fail?

The selected control must be a TextBox. Select a TextBox control, then try Toggle Duplicate Warning again.

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 on the Demographics tab.
Find Client	Use Search By fields to locate client records.
Add Client	Review the client creation workflow before displaying a field during client entry.
Personal Info	Clients information tab containing custom demo tab fields
Service Rapid Entry	Review the rapid service workflow before enabling a demographics field there.
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.
Manage User Groups	Instructions for managing user permissions by group