# Demographics Tab Custom Field

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|---|---|
| **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.

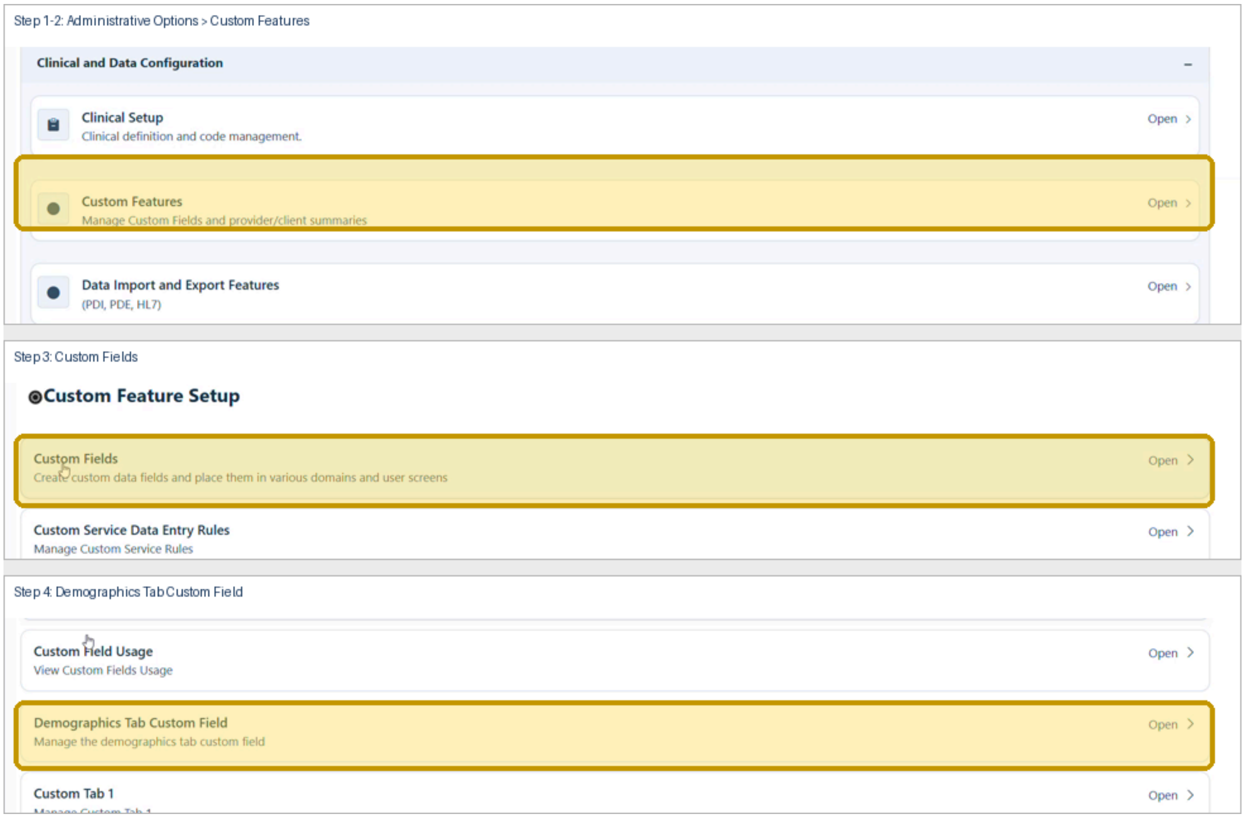
# Open Demographics Tab Custom Field

**Step 1.** **Click Administrative Options.**

**Step 2.** **Click Custom Features.**

**Step 3.** **Click Custom Fields.**

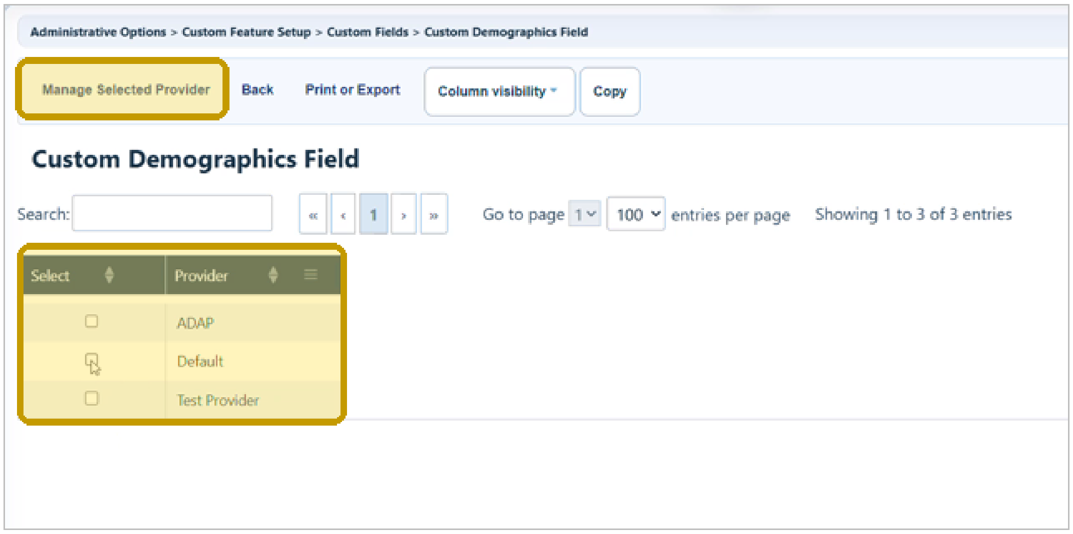
**Step 4.** **Click Demographics Tab Custom Field.**



## 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.

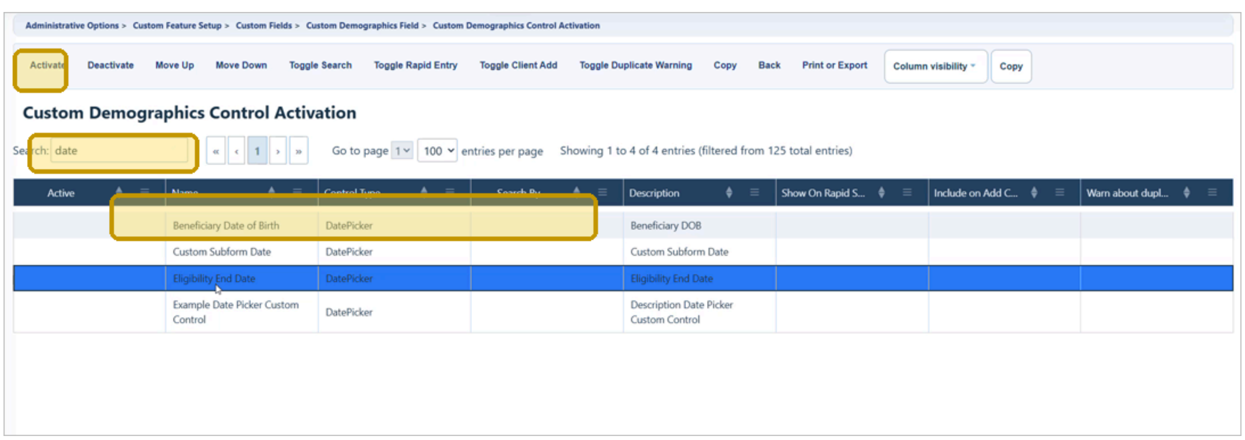


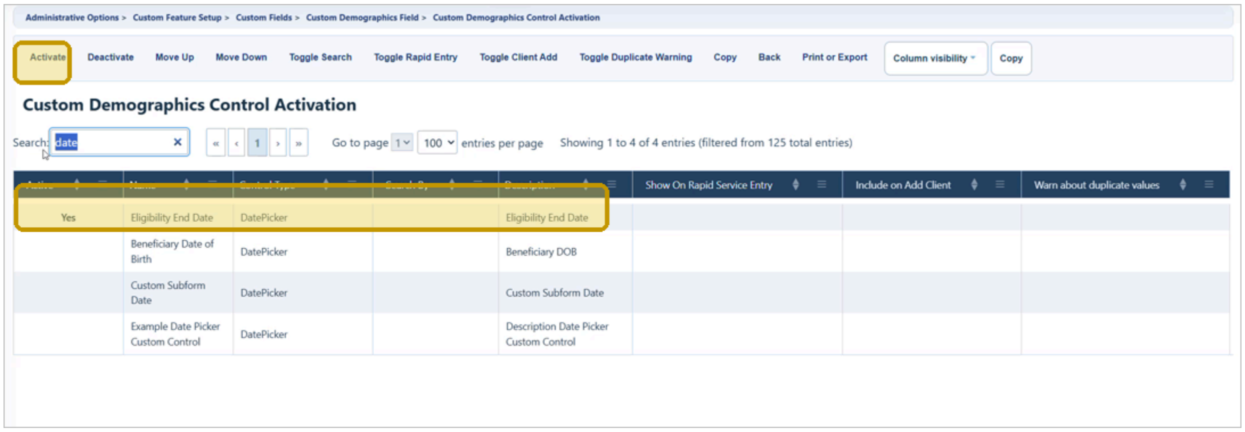

**Important**
Changes made here apply to the selected provider. Verify the provider before activating, deactivating, or reordering fields. If these changes are made in the provider instead of Central Administration, these changes only affect the provider the user is logged into.

## 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.**



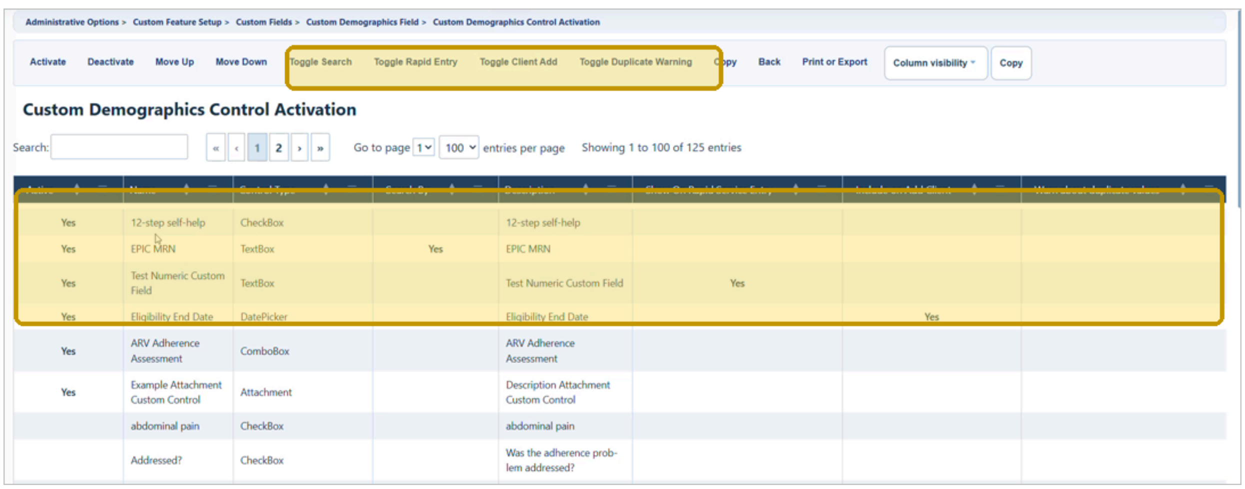



**Step 8.** **Select the active control and click Move Up or Move Down until it appears in the preferred order.**

## 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.




**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 |