

Annual Custom Fields

Purpose	Activate custom controls for annual client data and enter one value for each applicable calendar year.
Who should do this	CAREWare administrators or data managers activate fields. Authorized staff enter annual values in client records.
Use this setup when	Your program needs to collect information once per year that is not available in the standard Annual Review fields.
Main warning	Confirm the correct provider before activation. Do not repurpose a control after annual data has been entered.
Video walkthrough	Annual Custom Fields Video

Quick path

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

Before you begin

- Create the custom control definition in [Custom Control Setup](#) before activating it for Annual Custom Fields.
- Confirm whether you are working in Central Administration or a provider, and verify the provider in the top banner.
- Choose a durable control name, control type, valid values, default, and required status before production use.
- Use a test client or non-production environment when available to test the custom control.

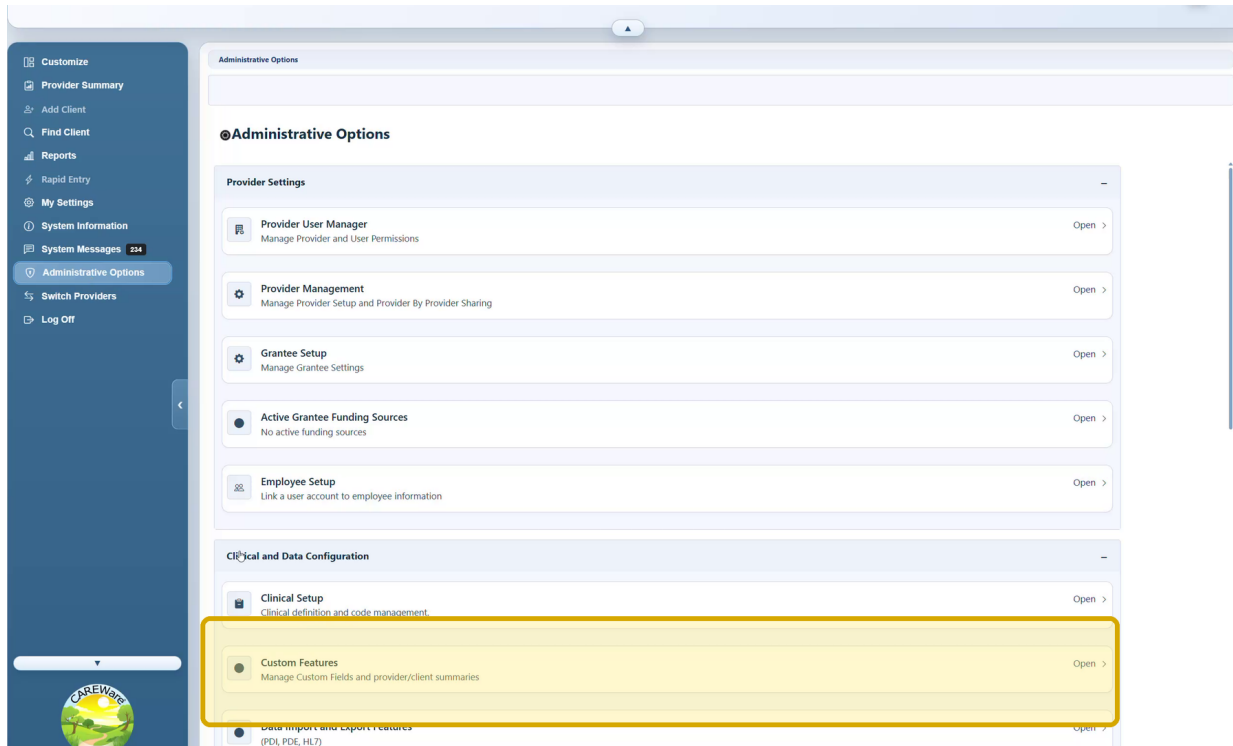
Important

Required settings, defaults, permissions, and ComboBox values affect annual data entry and may affect imports. Test the control before staff use it.

Open Annual Custom Fields

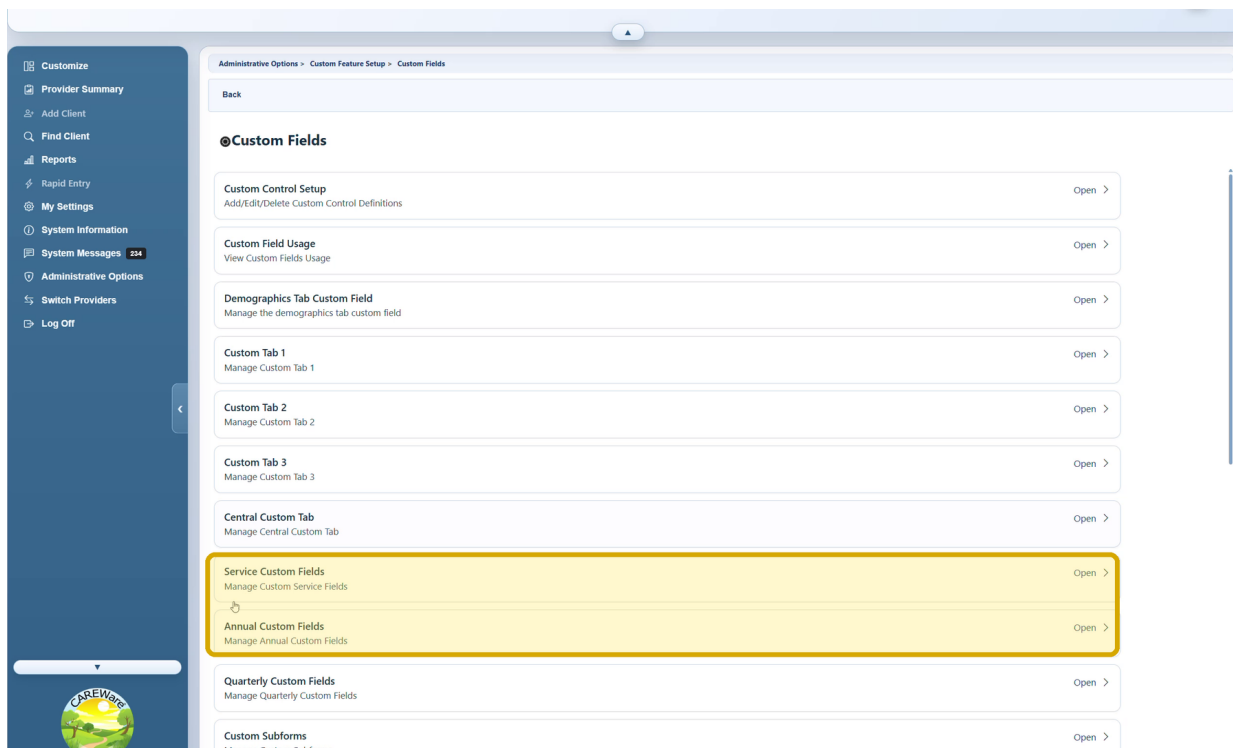
Step 1. Click Administrative Options.

Step 2. Click Custom Features.



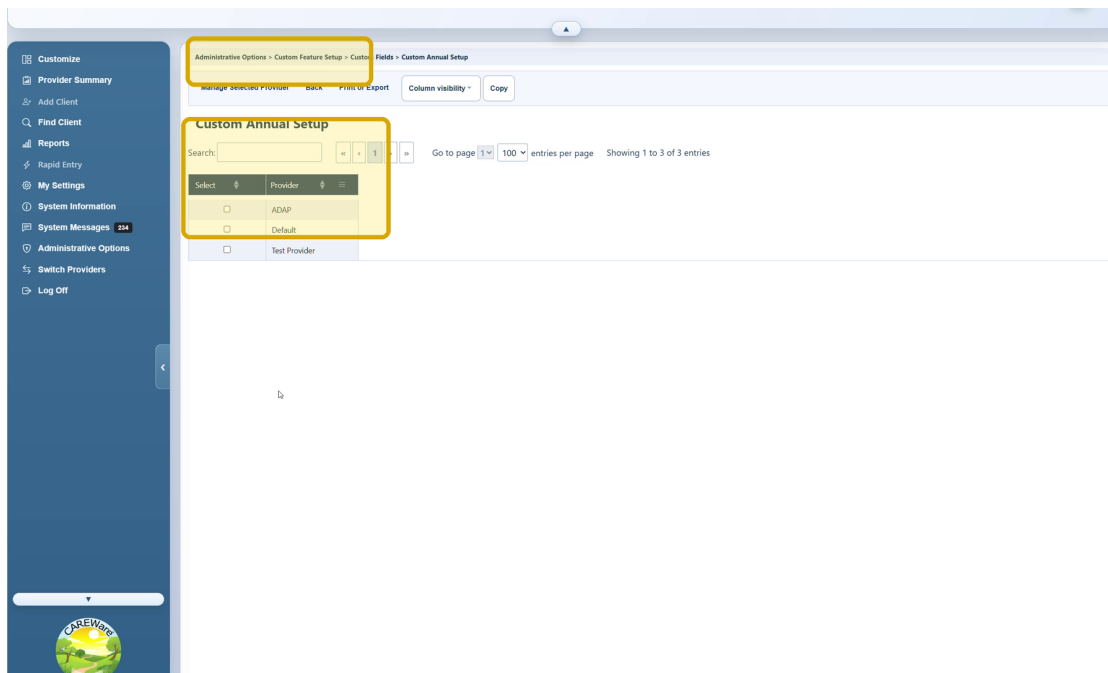
Step 3. Click Custom Fields.

Step 4. Click Annual 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.



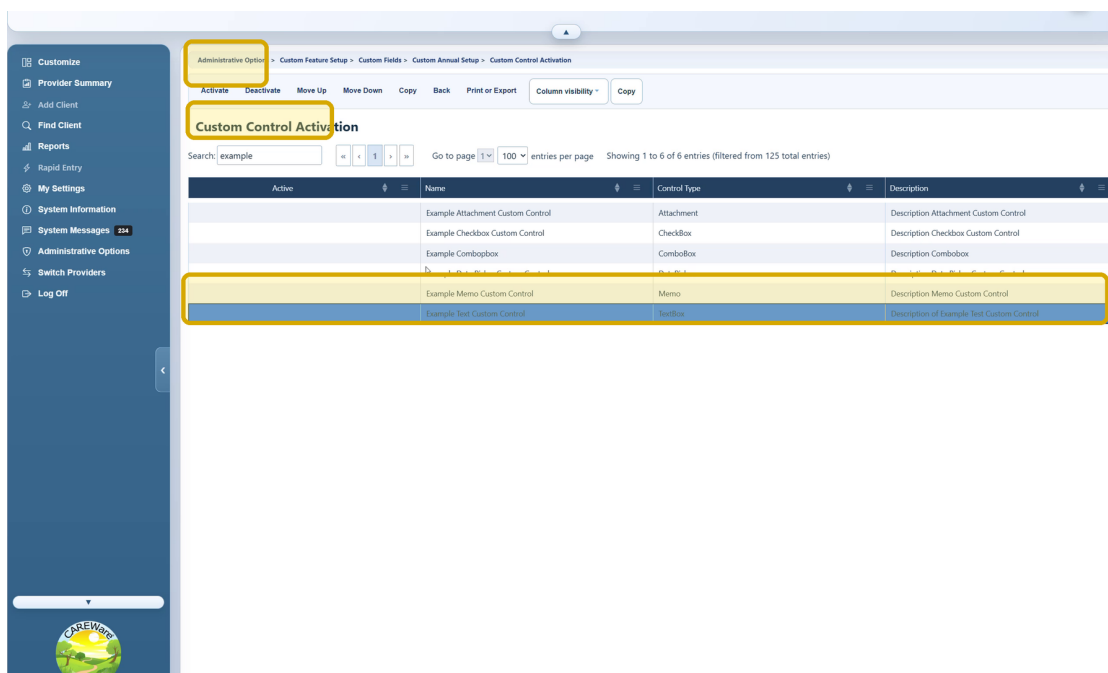
Important

Changes apply to the selected provider. Verify the provider before activating, deactivating, or reordering controls.

Activate an annual field

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

Step 7. Select the control, then click Activate.



Arrange or deactivate annual fields

Step 8. Confirm Active displays Yes for the control.

Step 9. Use Move Up or Move Down to place active controls in the preferred order.

Step 10. To stop displaying a field, select the active control and click Deactivate.

Important

Deactivating an annual field does not delete the control definition or historical annual values. Review reports, imports, exports, and workflows before making changes.

Custom Control Activation buttons

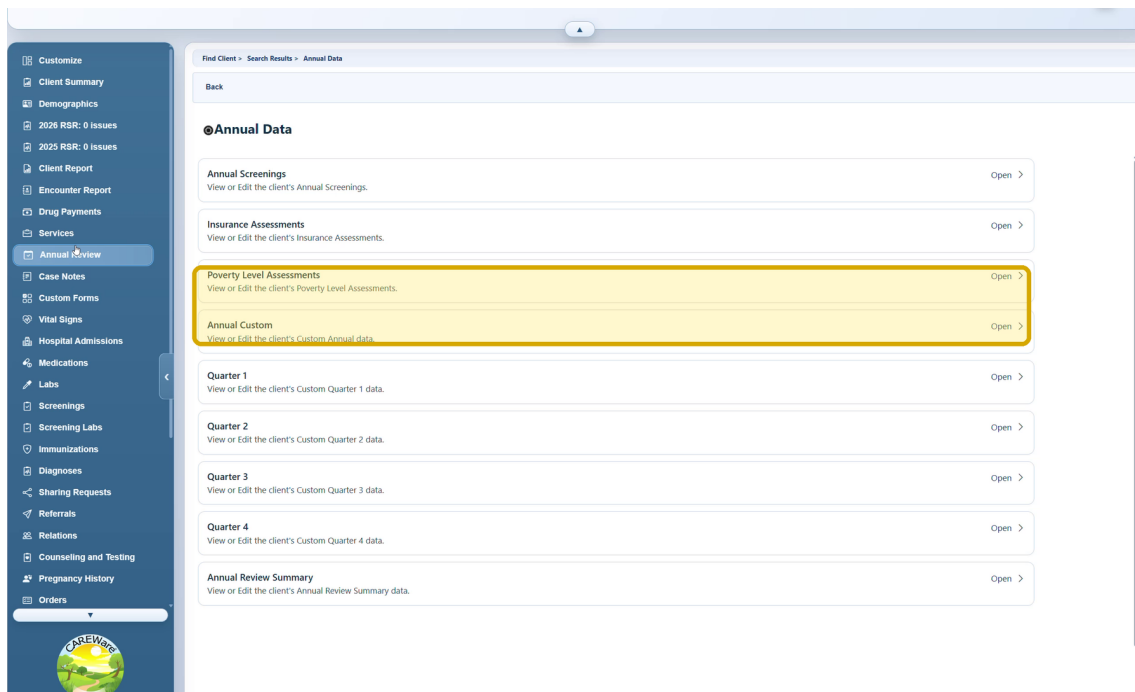
Button	What it does	When to use it
Activate	Makes the selected control available for annual data.	Use when staff should enter the field by year.
Deactivate	Stops displaying the control for new annual entry.	Use without deleting the definition or history.
Move Up / Move Down	Changes the order of active annual fields.	Place related fields in a logical sequence.
Back	Returns to provider selection.	Use to change providers or leave setup.
Print or Export	Prints or exports the activation list.	Use for review and change documentation.

Open Annual Custom in a client record

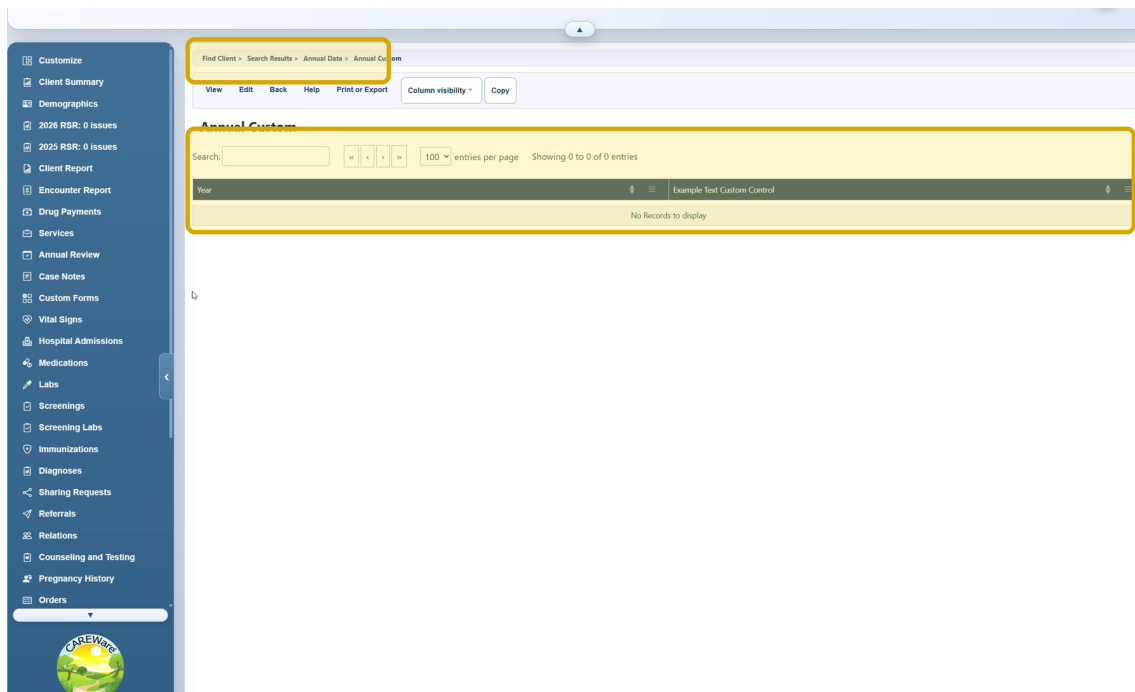
Step 11. Connect to the provider, click Find Client, and open the client record.

Step 12. Click Annual Review in the left menu.

Step 13. Click Annual Custom.



Step 14. Select the row for the year you need, then click Edit.



Tip

Annual Custom stores a separate value set for each year. If the year is not listed, then the client has yet to receive their first service for that year. Add a service to the client prior to adding Annual Review Custom records.

Create and complete the annual record

Step 15. If needed, add a valid service or other qualifying record dated in the target year.

Find Client > Search Results > Services

Save Add Add Receipt Back

Add Service

Client: Cotton Test

Date: 07/16/2026

Contract: This year contract 2026-2027

Service Category: Outpatient Ambulatory Health Services

Service Name: A/O Medical

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Provided By:

Start Time: --:--

End Time: --:--

12-step self-help: ☐

Blue pills: ☐

The client is not eligible to receive Ryan White services as of: 2026-07-16

Step 16. Return to Annual Review > Annual Custom, select the year, and click Edit.

Step 17. Enter the annual custom value, then click Save.

Find Client > Search Results > Annual Custom

Custom Value Step

Annual Custom

Year	Value	Description
2026	100	100 % within per page

Go to page 100 % within per page Showing 1 of 1 entry

Find Client > Search Results > Annual Custom

Annual Custom

Year	Value	Description
2026	100	100 % within per page

Data-quality tips

- Use a ComboBox for standardized values that must be counted, grouped, or reported consistently.
- Use a DatePicker for dates and a Memo only for longer narrative information.
- Use default values sparingly; a blank value is often safer than an incorrect value accepted without review.
- For a used ComboBox choice, deactivate the value instead of deleting it.

Important

Do not change a control's business meaning after annual data exists. Create a replacement control when the question or data concept changes.

How to confirm it worked

- Open a test client and confirm the active control appears under Annual Review > Annual Custom for the intended year.
- Confirm required behavior, default values, length limits, ComboBox choices, and edit permissions.
- Confirm reports, exports, and custom field templates display the field as intended.

Troubleshooting and common questions

Why can't I see Annual Custom Fields?

Confirm the account can access Administrative Options, Custom Features, and Custom Fields. Ask a local administrator to review permissions.

Why is the control not listed?

Confirm the control definition exists in the correct domain.

Why does the client have no row for the year?

Confirm the client has services for the target year.

Why can't a user edit the value?

Review Toggle Edit by Permission and the user's permission group. Test each applicable role.

Why is an old ComboBox value still visible?

Historical records preserve values that were previously used. Deactivate obsolete choices rather than deleting used values.

Related CAREWare guides and resources

Resource	How it helps
Find Client	Locate and open the client record used for annual data entry.
Custom Control Setup	For adding new custom fields to the list
Provider User Manager	Review permissions for administrators and data-entry staff.
Services	For adding service records to clients
Edit Values	For updating drop down lists