Quarterly Custom Fields

Purpose	Activate quarterly custom controls for a provider and enter client values for Quarter 1 through Quarter 4 by calendar year.
Who should do this	CAREWare administrators or data managers who configure fields, and authorized staff who enter quarterly client data.
Use this setup when	You need to collect, review, or update custom information separately for each calendar quarter.
Main warning	Verify the provider, client, year, and quarter. Quarterly rows are tied to service dates, so a service needs to be entered during the calendar year for a row to appear.
Video walkthrough	Quarterly Custom Fields Video

Quick path

Setup: Administrative Options > Custom Features > Custom Fields > Quarterly Custom Fields > select provider > Manage Selected Provider
Data entry: Find Client > select client > Annual Review > Quarter 1, Quarter 2, Quarter 3, or Quarter 4

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, valid values, required status, default value, and edit permissions before activation.
- Confirm the client has a valid service in the quarter and year you need to document. Enter only services that actually occurred.
- Use a test or non-production record when available.

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

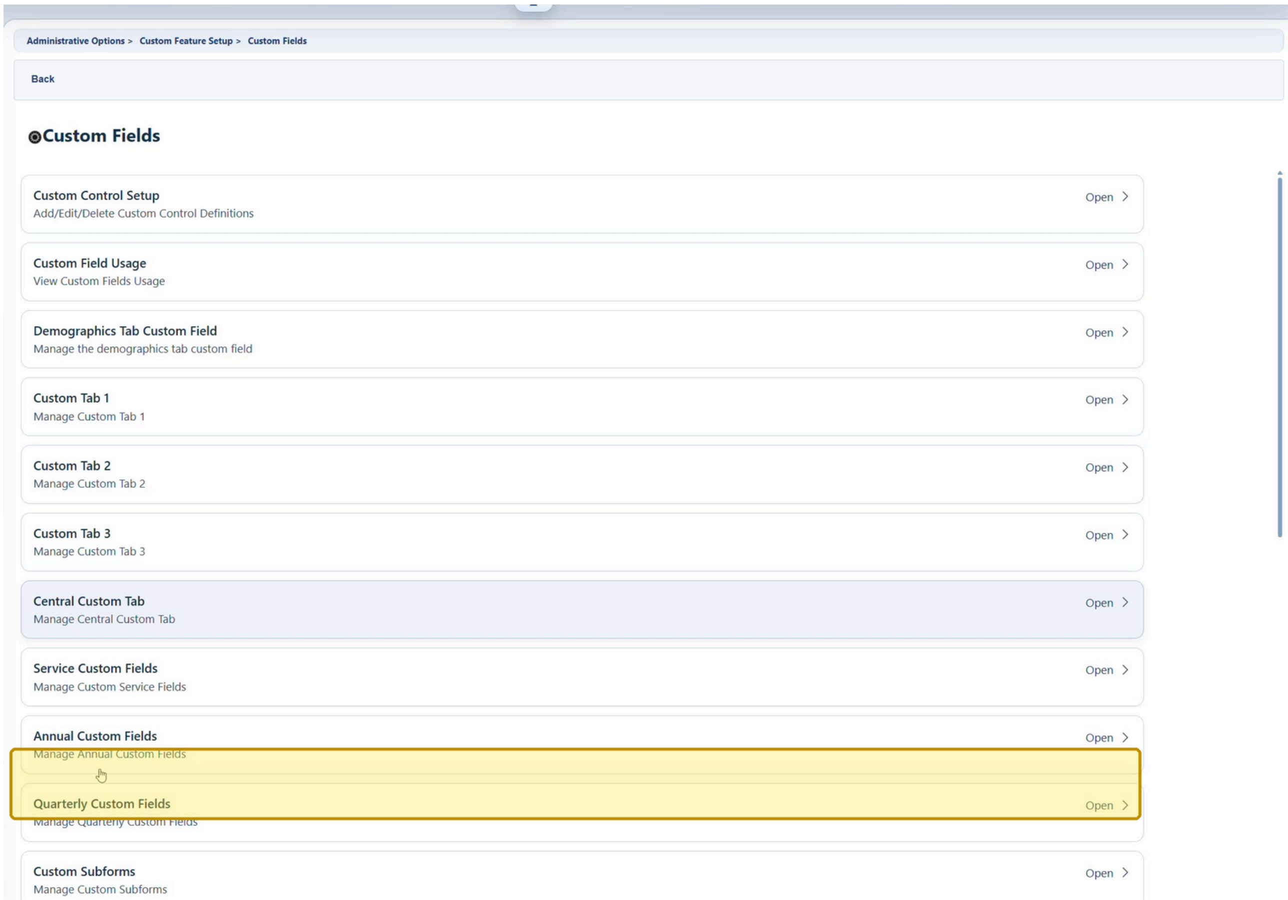
Open Quarterly Custom Fields

Step 1. **Click Administrative Options.**

Step 2. **Click Custom Features.**

Step 3. **Click Custom Fields.**

Step 4. **Click Quarterly Custom Fields.**

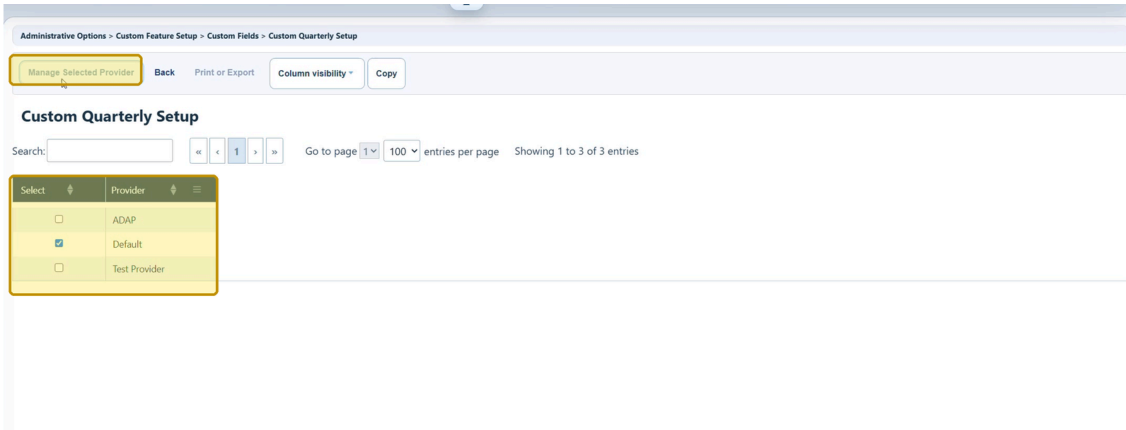


Tip

If Quarterly Custom Fields are missing, ask a local administrator to verify access to Administrative Options, Custom Features, and 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.



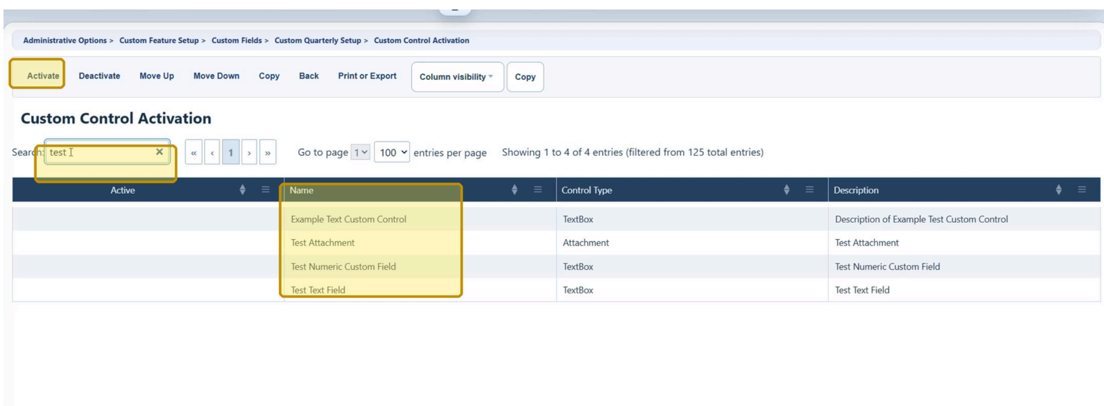
Important
Changes apply to the selected provider. Verify the provider before activating, deactivating, or reordering controls.

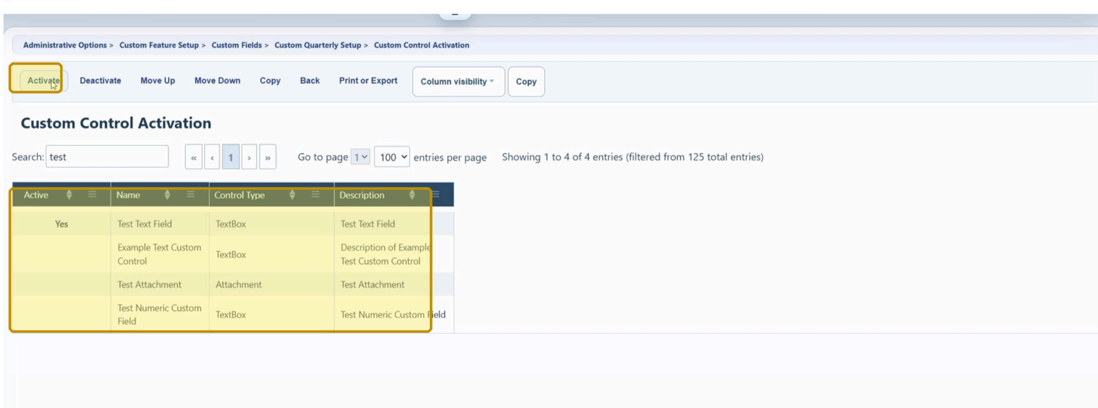
Activate and place a field

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.





Find a client and open an annual quarterly assessment record

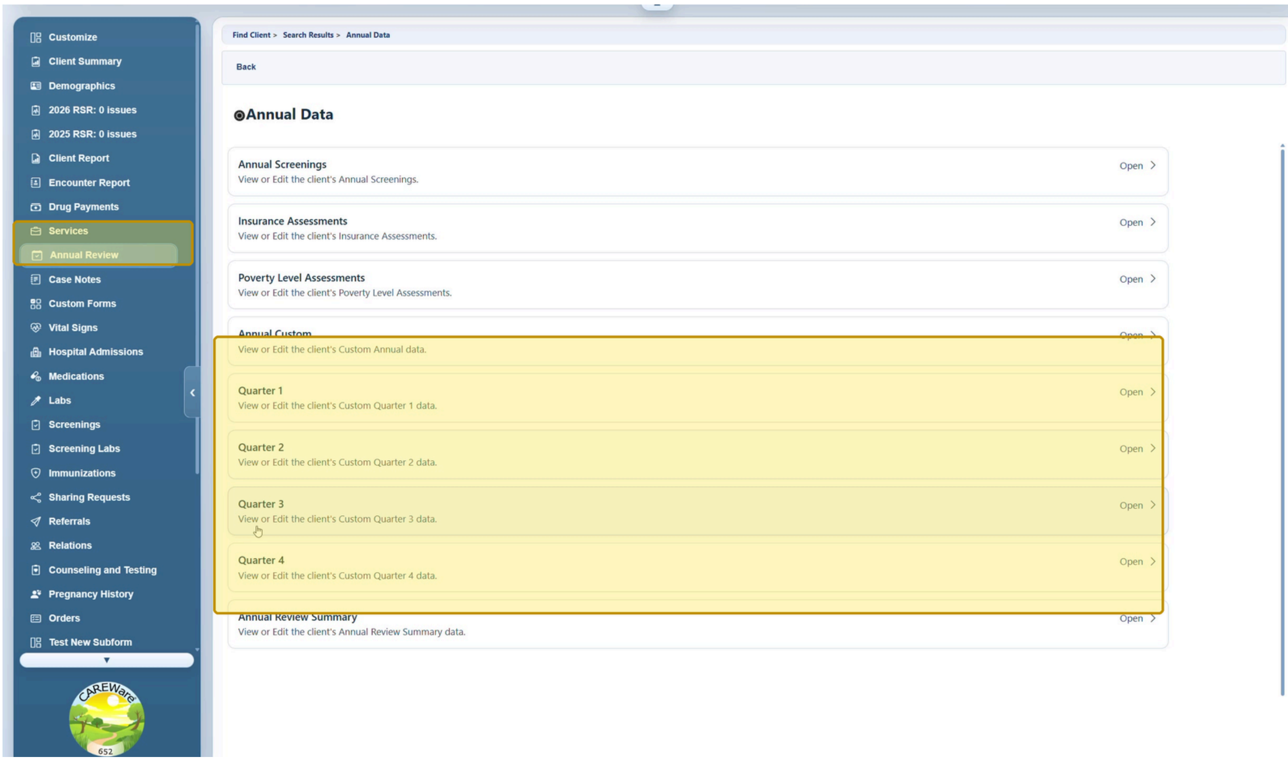
Step 9. Switch to the provider used for the quarterly setup.

Step 10. Click Find Client, enter search criteria, and click Client Search.

Step 11. Select the client and click View Details.

Step 12. Click Annual Review.

Step 13. Open Quarter 1, Quarter 2, Quarter 3, or Quarter 4.



Create the quarter-year row when needed

If the quarter list does not contain the needed year, verify whether the client has a valid service dated in that quarter.

Step 14. Click Services, then add a service record.

Step 15. Set the Date within the quarter you need to document.

Quarter	Calendar dates
Quarter 1	January 1 through March 31
Quarter 2	April 1 through June 30
Quarter 3	July 1 through September 30
Quarter 4	October 1 through December 31

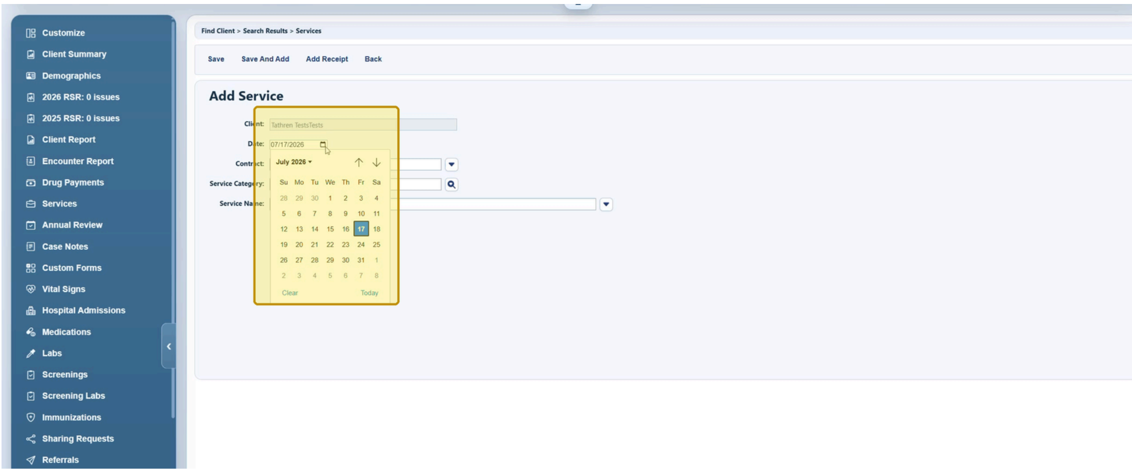
Step 16. Select the Contract, Service Category, and Service Name. Complete all required service fields.

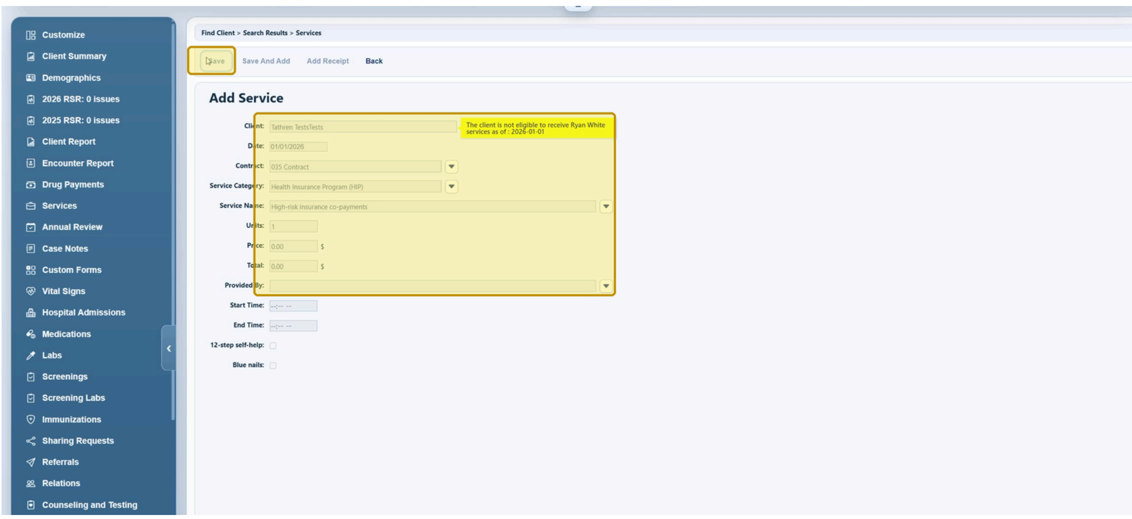
Step 17. Click Save and resolve any eligibility or validation warning according to local policy.

Step 18. Return to Annual Review and open the target quarter.

Important

If there are no services in the drop down list or contracts are missing, update contracts to ensure there is at least one active funded contract as of the date of service.





Important
Enter only services that actually occurred. Do not create a placeholder or fictitious service merely to make a quarterly row appear.

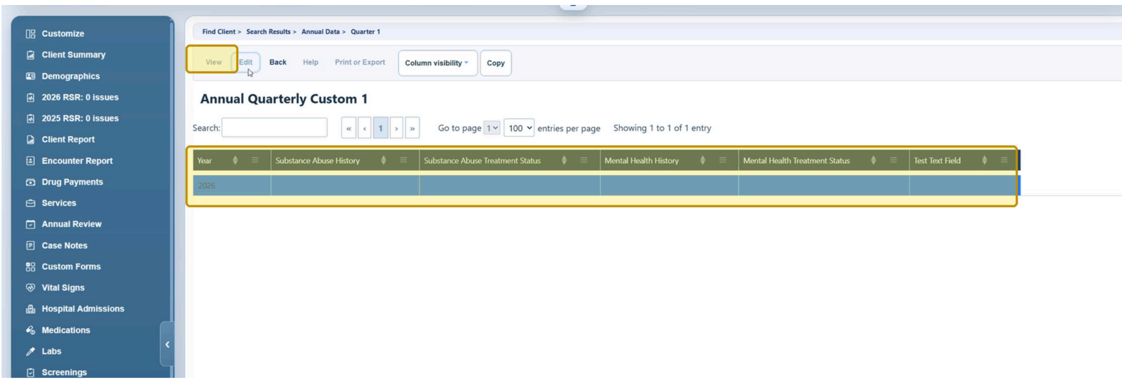
Enter quarterly custom field values

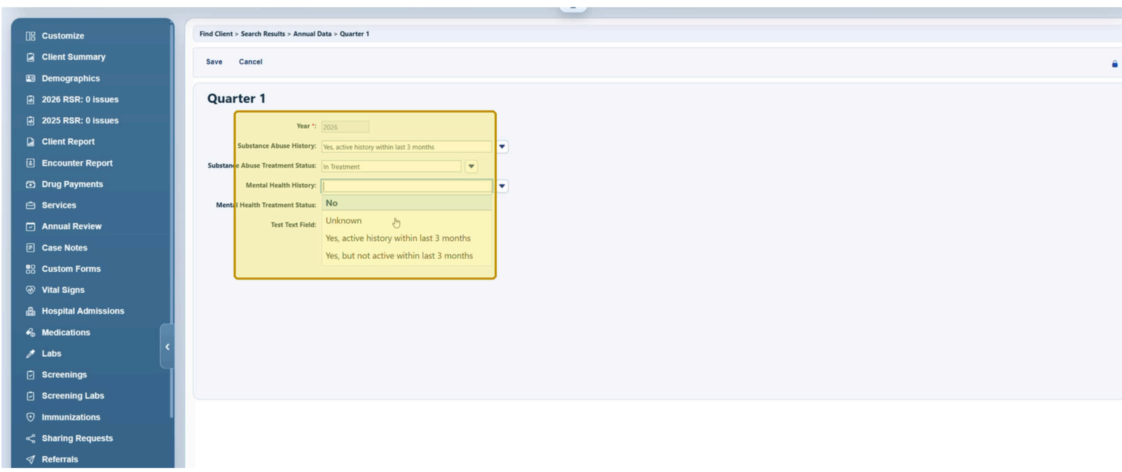
Step 19. **Select the year row and click Edit.**

Step 20. **Complete each quarterly custom field. Use the available drop-down values when the control is a ComboBox.**

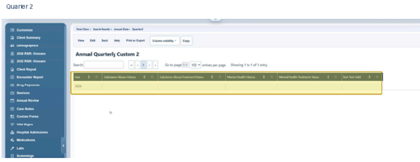
Step 21. **Click Save.**

Step 22. **Repeat the process for each additional quarter and year that requires data.**

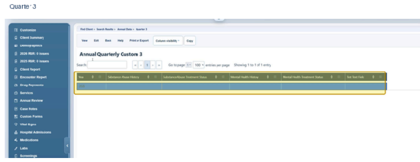




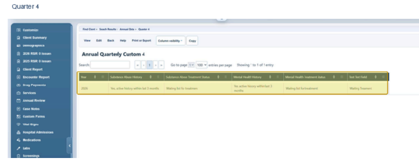
Quarter 2



Quarter 3



Quarter 4



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 and codes 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.

Important

Required fields and default values affect every quarter where the control is active. Test each relevant role and workflow before production use. Required fields also affect imported client records.

Custom Control Activation buttons

Button	What it does	When to use it
Activate	Adds the selected control to the provider's quarterly forms.	Use when the field should appear in Quarter 1 through Quarter 4.
Deactivate	Stops displaying the selected control for future quarterly entry.	Use to retire a field without deleting its definition or historical data.
Move Up / Move Down	Changes the field order on the quarterly edit page.	Use after activation to place fields in a logical order.
Back	Returns to the provider selection page.	Use when changing providers or leaving 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 details.

How to confirm it worked

- Open a test client in the selected provider and confirm the field appears in the expected order on each applicable quarter.
- Confirm the year row matches the year of the service date used for that quarter.
- Save values, reopen the quarter, and confirm the values remain.
- For ComboBox controls, confirm that only intended active values are available.
- Confirm required behavior, default values, length limits, and edit permissions for each role.
- If the fields are used in reports, imports, exports, forms, or templates, verify those workflows after the change.

> **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 Quarterly Custom Fields?

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

Why is there no row for the year in a quarter?

Confirm that the client has a valid service dated in that calendar quarter and year for the selected provider.

Why can't a user edit the field?

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

Why are expected ComboBox choices missing?

Open the control definition, review Edit Values, and confirm the intended values are active.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain control definitions before activation.
Find Client	Locate the client record used for quarterly entry.
Services	Add and review valid client service records.
Edit Values	Manage ComboBox choices, including activation and deactivation.
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 user access and individual permissions.
Manage User Groups	Manage permission groups for users and providers.
Contract Manager	Add, Update, or copy contracts for providers