

Custom Agency Fields

Purpose	Activate existing custom controls on a provider's Agency Information screen and collect provider-level information.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Administrative Options, Custom Fields, and Provider Setup.
Use this setup when	A custom field must be activated, deactivated, or reordered for provider Agency Information.
Main warning	Activation is completed in Central Administration. Confirm the field's scope before release, and do not store client-level information in an agency field.
Video walkthrough	Custom Agency Fields Video

Quick path

Administrative Options > Custom Features > Custom Fields > Custom Agency Fields

Before you begin

- Create the custom control definition in [Custom Control Setup](#) before activating it for Agency Information.
- Confirm the top banner shows Central Administration before changing Custom Agency Fields.
- Choose the simplest control type and avoid duplicating built-in fields such as Name, address, State, County, Area, or ZIP.
- Identify a test provider and confirm you have permission to edit Provider Setup.

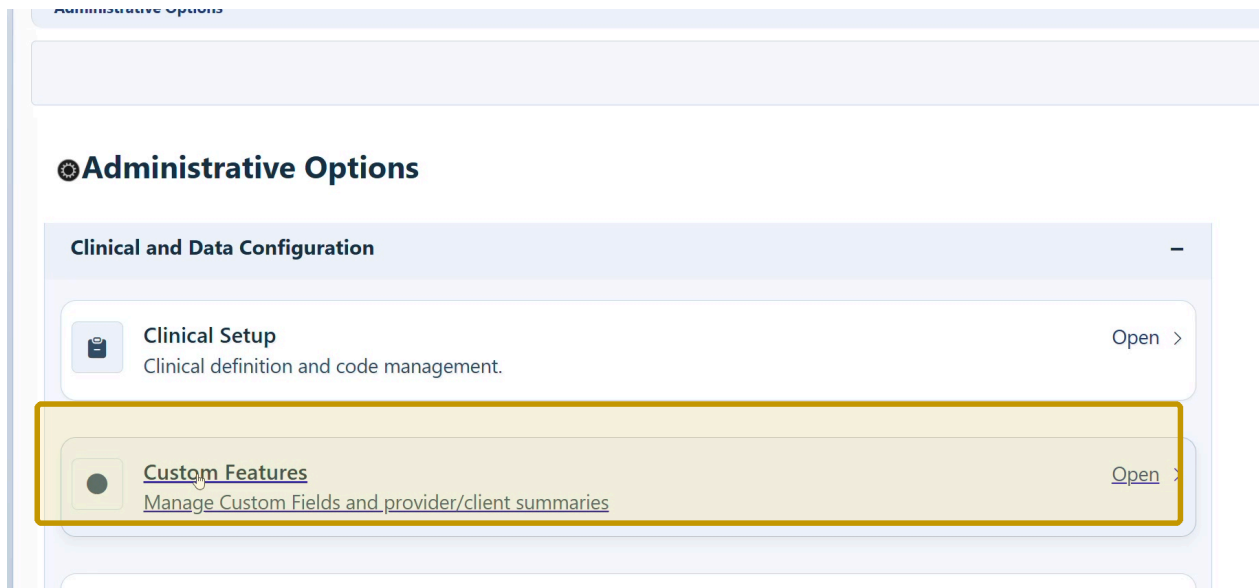
Important

Creating a custom control definition and activating it as a Custom Agency Field are separate tasks. The activated field appears in Agency Information, and each provider stores its own value.

Open Custom Agency Fields

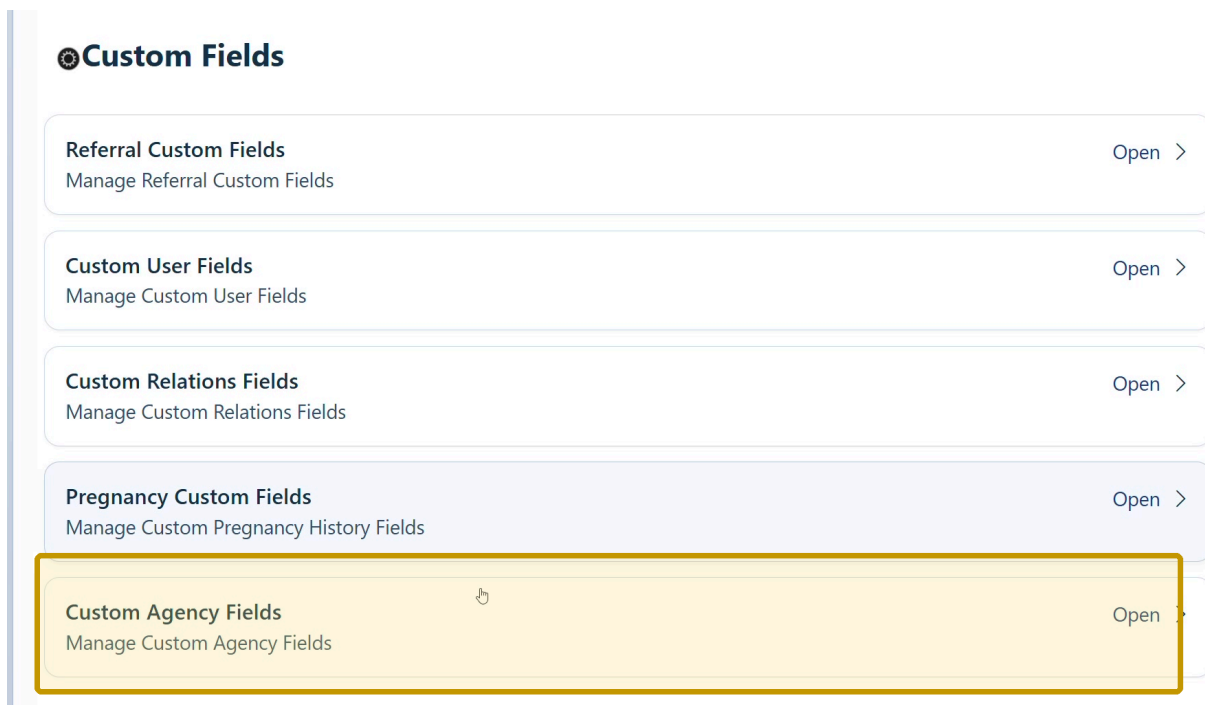
Step 1. Click Administrative Options.

Step 2. Click Custom Features.



Step 3. Click Custom Fields.

Step 4. Click Custom Agency Fields.



Activate and order a custom field

Step 5. Enter part of the control name or description in Search.

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

Activate Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

Custom Control Activation

Search: agency

« < 1 > »

Go to page 1 entries per page 100

Showing 1 to 1 of 1 entry (filtered from 131 total entries)

Active	Name	Control Type	Description
	Test Custom Agency Fields	TextBox	Test Custom Agency Fields

Step 6. Select the control, then click Activate.

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

Activate Deactivate Move Up Move Down Copy Back Print or Export Column visibility Copy

Custom Control Activation

Search: agency

« < 1 > »

Go to page 1 entries per page 100

Showing 1 to 1 of 1 entry (filtered from 131 total entries)

Active	Name	Control Type	Description
	Test Custom Agency Fields	TextBox	Test Custom Agency Fields

Step 7. Confirm that Active displays Yes for the control.

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

Deactivate a field

Step 9. Select the active control and click Deactivate.

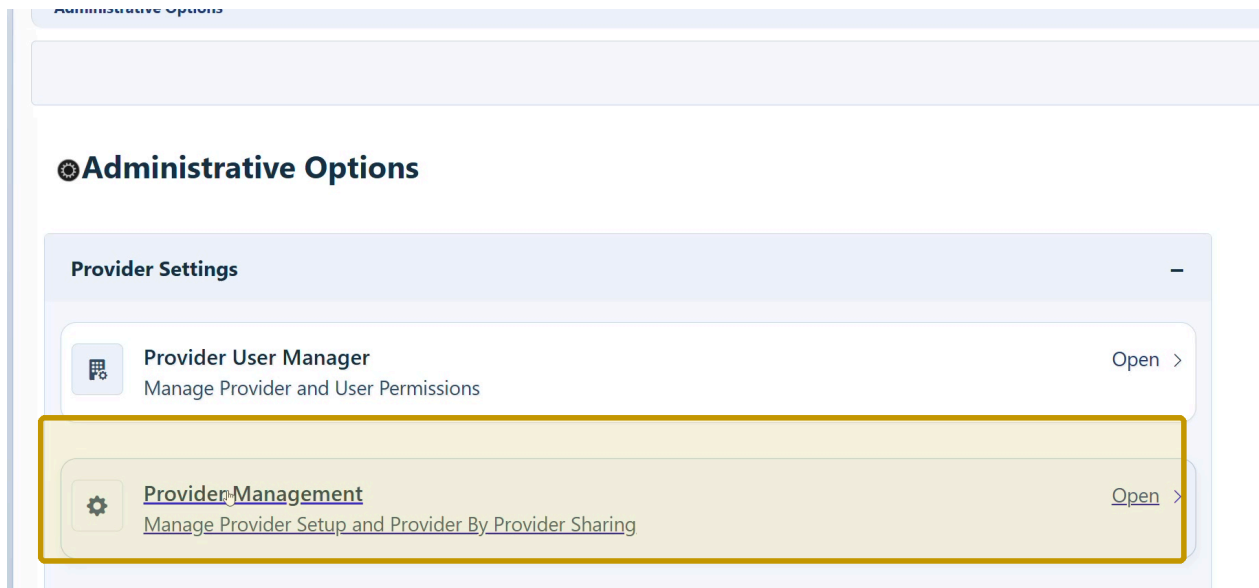
Important

Deactivating a Custom Agency Field stops displaying it for new or edited Agency Information records. It does not delete the control definition or remove provider values already stored.

Open Provider Setup

Step 10. Click Administrative Options.

Step 11. Click Provider Management.



Step 12. Click Provider Setup.

Select the provider and open Agency Information

Step 13. Select the provider, then click Manage Selected Provider.

The screenshot shows the 'Provider Setup' page. At the top, there is a breadcrumb trail: 'Administrative Options > Provider Management > Provider Setup'. Below this, a toolbar contains the 'Manage Selected Provider' button (highlighted with a yellow box), 'Back', 'Print or Export', 'Column visibility' (with a dropdown arrow), and 'Copy'. The main heading is 'Provider Setup'. Below the heading is a search bar and pagination controls: 'Search: [input]', '<< < 1 > >>', 'Go to page [1] [100] entries per page', and 'Showing 1 to 3 of 3 entries'. A table lists providers: 'ADAP', 'Default' (highlighted with a yellow box), and 'Test Provider'.

Important

Verify the provider before entering or changing agency information. Each provider maintains its own Agency Information record.

Step 14. Scroll to Agency Information and click Open.

The screenshot shows the 'Agency Information' section. At the top, there is a 'Share No Form Designer Data' button. Below it, the 'Provider Areas' section shows '0 total Provider areas' and an 'Open >' button. The 'Agency Information' section is highlighted with a yellow box and shows 'Default,' and an 'Open >' button. Below it, the 'Additional Agency Information' section shows 'Default Provider ID: 12345' and an 'Open >' button.

Enter and save the agency value

Step 15. Enter the value in the custom agency field.

Step 16. Click Save.

Administrative Options > Provider Management > Provider Setup > Default > Agency Information

Save Cancel

Agency Information

Name: Default

Street Address:

City:

State:

County:

Area:

ZIP:

HOPWA Area Median Income:

Test Custom Agency Fields: Custom Agency Field Value

Step 17. Reopen Agency Information.

Step 18. Confirm that the saved value is retained.

Important

Required controls must be completed before Save succeeds. Test required behavior, default values, length limits, ComboBox choices, and edit permissions before production use.

How to confirm it worked

- The custom field appears in the expected order on Agency Information.
- A test value can be saved, reopened, and retained for the selected provider.
- Only the intended active ComboBox values are available, when applicable.
- Users with the appropriate role can edit the field, and restricted users cannot.

Custom Control Activation buttons

Button	What it does	When to use it
Activate	Adds the selected control to Agency Information.	Use when providers should collect the field.
Deactivate	Removes the field from Agency Information without deleting its definition.	Use when the field should no longer be displayed.
Move Up / Move Down	Changes the field's position on Agency Information.	Use to place related fields in a logical order.
Copy	Copies selected activation information where supported.	Use only under the local change-control process.
Back	Returns to the Custom Fields page.	Use when leaving Custom Agency Fields.
Print or Export	Opens options to print or export the grid.	Use for review or change documentation.
Column visibility	Shows or hides grid columns.	Use to simplify the list or display details.

Provider Setup buttons

Button	What it does
Manage Selected Provider	Opens setup for the highlighted provider.
Agency Information	Opens the provider name, address, area, and active custom agency fields.
Save	Saves built-in and custom agency information for the selected provider.
Cancel	Leaves the edit screen without saving the current changes.

Helpful data-quality tips

- Use a ComboBox for standardized agency information that must be counted, grouped, or reported consistently.
- Use a TextBox for short identifiers or labels, a DatePicker for dates, and a Memo only for longer narrative information.
- Do not duplicate built-in Agency Information fields or use an agency field to store client-level data.
- 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 training materials.
- For a ComboBox, manage choices through [Edit Values](#) and deactivate a used value instead of deleting it.
- Use Toggle Edit by Permission for sensitive or controlled data, then test each applicable role. See [Manage User Groups](#).

Before changing an existing agency field

- Check where the control is active and whether provider values already exist.
- Review reports, imports, exports, templates, and staff procedures that may depend on the field.
- Create a replacement control instead of changing the original business meaning.

Tip

After a control contains production data, do not repurpose it. Create a new control, test it, and deactivate the old control only after affected workflows have been reviewed.

Troubleshooting and common questions

Why is the control not listed?

Confirm that the definition exists under [Custom Control Setup](#). Refresh the list using [Resetting the Custom Field List](#) when appropriate.

Why does an active field not appear in Agency Information?

Confirm that Active displays Yes, reopen the selected provider's Agency Information screen, and verify that you are in the intended provider.

Why does Save fail?

Complete required fields, verify length or allowed values, and review any validation message displayed beside the field.

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.

Why does a ComboBox have no choices?

Open the control in [Custom Control Setup](#), select [Edit Values](#), and confirm the intended values are active.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain the control definition before activation.
Provider Setup	Select a provider and maintain its Agency Information record.
Custom Field Usage	Review where custom controls are active and how they are used.
Resetting the Custom Field List	Refresh custom field lists when a new or changed control is not displayed.
Edit Values	Add, edit, activate, and deactivate ComboBox choices.
Custom Fields	Open the CAREWare Custom Fields section for related setup guides.
Manage User Groups	Review and assign permissions by user role or group.