

Custom User Fields

Purpose	Activate and arrange custom controls on CAREWare user accounts and verify them on the User Info page.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Central Administration, Custom Fields, and Provider User Manager.
Use this setup when	A custom control should collect staff or user-account information on the User Info page.
Main warning	Custom user fields apply to CAREWare user accounts, not client records. Do not store passwords, authentication tokens, or client information in these fields.
Video walkthrough	Custom User Fields Video

Quick path

Activate: Central Administration > Administrative Options > Custom Features > Custom Fields > Custom User Fields
Verify: Administrative Options > Provider User Manager > Manage Active Users > select user > Manage > User Info

Before you begin

- Create the custom control definition in [Custom Control Setup](#) before activating it for user accounts.
- Confirm that the top banner shows Central Administration. Custom user fields are configured for CAREWare user accounts.
- Decide the field order, the data owner, and who should be allowed to edit the value.
- Use a test user account when available, and avoid changing live user records solely for testing.

Important

Creating a custom control definition and activating it as a user field are separate tasks. Required fields and default values affect every user record where the field is available, including imports. Use them only when the value is consistently appropriate.

Open Custom User Fields

Step 1. Click Administrative Options.

Step 2. Click Custom Features.

Step 3. Click Custom Fields.

Step 4. Click Custom User Fields.



Activate and place a user field

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

Step 6. Select the control.

Step 7. Click Activate.

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

Active displays Yes

test » page 1 entries per page entries)

Active	Name	Control Type	Description
Yes	Test User Custom Fields	TextBox	Test User Custom Fields
	Example Text Custom Control	TextBox	Description of Example Test Custom Control
	Test Attachment	Attachment	Test Attachment

Tip

- If the field is not listed, confirm its definition exists under Custom Control Setup.
- Choose a durable field name that remains understandable in user lists, reports, and documentation.

Verify the field on a user account

Step 9. Return to Administrative Options and click Provider User Manager.

Step 10. Click Manage Active Users.

Step 11. Select the user and click Manage.

Step 12. Click User Info.

Step 13. Confirm the custom field appears. To enter or update a value, click Edit, complete the field, and save.

Step 13 - Confirm the custom user field

User Info

Username/Login ID: CWTEMP

First Name: CW

Last Name: TEMP

Phone: NA

Office Phone:

Extension:

Fax:

Email: NA

Title:

API Worker: ☐ Checking this will disable login through the user interface for this account

Test User Custom Fields:

[Edit](#)

Important

Custom user fields are for information about CAREWare user accounts. Do not use them for client data, passwords, authentication secrets, security answers, or access tokens.

Custom User Field activation buttons

Button	What it does	When to use it
Activate	Adds the selected control to User Info.	Use when the field should appear on CAREWare user accounts.
Deactivate	Stops displaying the selected field on User Info.	Use after reviewing existing data, reports, and staff workflows.
Move Up / Move Down	Changes the field order on User Info.	Place related fields together and put higher-priority items first.
Back	Returns to the Custom Fields menu.	Use to leave the activation list or choose another custom field location.
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 information.

Deactivate a field

Step 14. Select the active field and click Deactivate.

Important

- Deactivation removes the field from the user-information workflow. Review existing user records and any reports or procedures that rely on the field before deactivating it.
- Do not repurpose an existing control for a different meaning. Create a replacement control when the business purpose changes.

How to confirm it worked

- Confirm Active displays Yes for the selected control.
- Open a test user account and confirm the field appears on User Info in the expected order.
- Click Edit and confirm authorized staff can enter or update the value.
- Confirm required behavior, default values, length limits, and edit permissions.
- 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 grouped, filtered, or reported consistently.
- Use a DatePicker for dates so CAREWare can enforce a valid date format.
- Keep IDs, extension codes, and values with leading zeros as text unless they are true quantities.
- Use default values sparingly. A blank value is safer than an incorrect value accepted without review.
- Limit access to fields that contain personnel, role, credentialing, or other sensitive administrative information.
- Document who approved the field, when it was activated, and how future changes will be reviewed.

Important

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

Troubleshooting and common questions

Why does the field not appear on User Info?

Confirm Active displays Yes, open the correct user account, refresh the page, and verify the field order.

Why can't I edit the field?

Click Edit and review Toggle Edit by Permission in Custom Control Setup along with the administrator's permission group.

Why does a ComboBox have no choices?

Open [Custom Control Setup](#), edit the ComboBox values under [Edit Values](#), and confirm the intended values are active.

Why does Save fail for a user record?

Check required custom fields, text length, date format, active ComboBox values, and any validation message displayed beside the field.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain custom control definitions before activation.
Custom Field Usage	Review where a custom control is active in CAREWare.
Resetting the Custom Field List	Refresh the list when a new or changed control is not displayed.
Provider User Manager	Manage user accounts, provider assignments, permissions, and user groups.
Manage Users	Review instructions for creating and maintaining CAREWare user accounts.
Edit Values	Add, edit, or deactivate drop down list values.