Custom Relations Fields

Purpose	Activate existing custom controls for use on client Relations records and collect relationship-specific information when two client records are linked.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Administrative Options and Custom Fields.
Use this setup when	A custom field must be activated, deactivated, or reordered on the Relations entry screen for a provider.
Main warning	Confirm the correct provider before making changes. Activation affects the selected provider, and repurposing a control after it contains data can affect reports and historical records.
Video walkthrough	Custom Relations Fields Video

Quick path

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

Before you begin

- Create the custom control definition in Custom Control Setup before activating it for Relations.
- Confirm whether you are working in Central Administration or inside a provider, and verify the provider shown in the top banner.
- Decide what the field must collect and choose the simplest control type that represents the data.
- Use a test or non-production client relationship when available.

Important

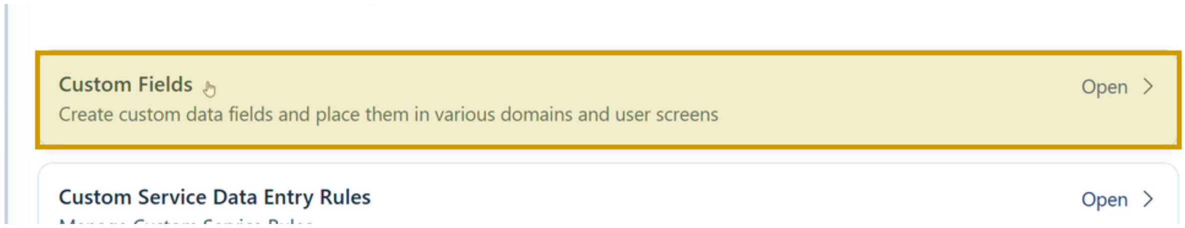
Creating a custom control definition and activating it for Relations are separate tasks. Custom relation fields add information to the relationship record; they do not replace the built-in relationship type selected in Is The.

Open Custom Relations Fields

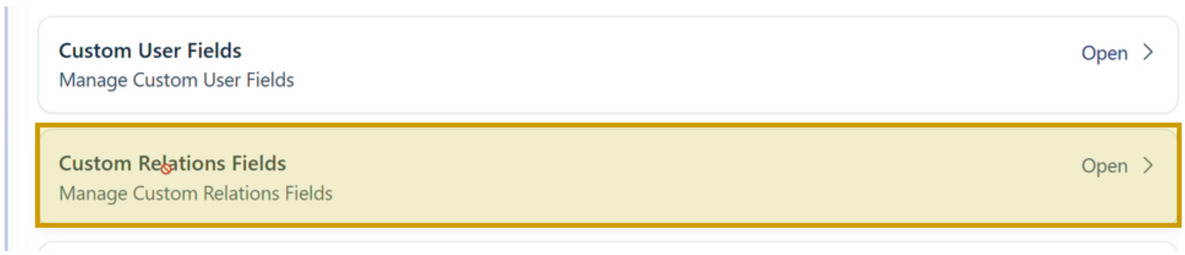
Step 1. **Click Administrative Options.**

Step 2. **Click Custom Features.**

Step 3. **Click Custom Fields.**

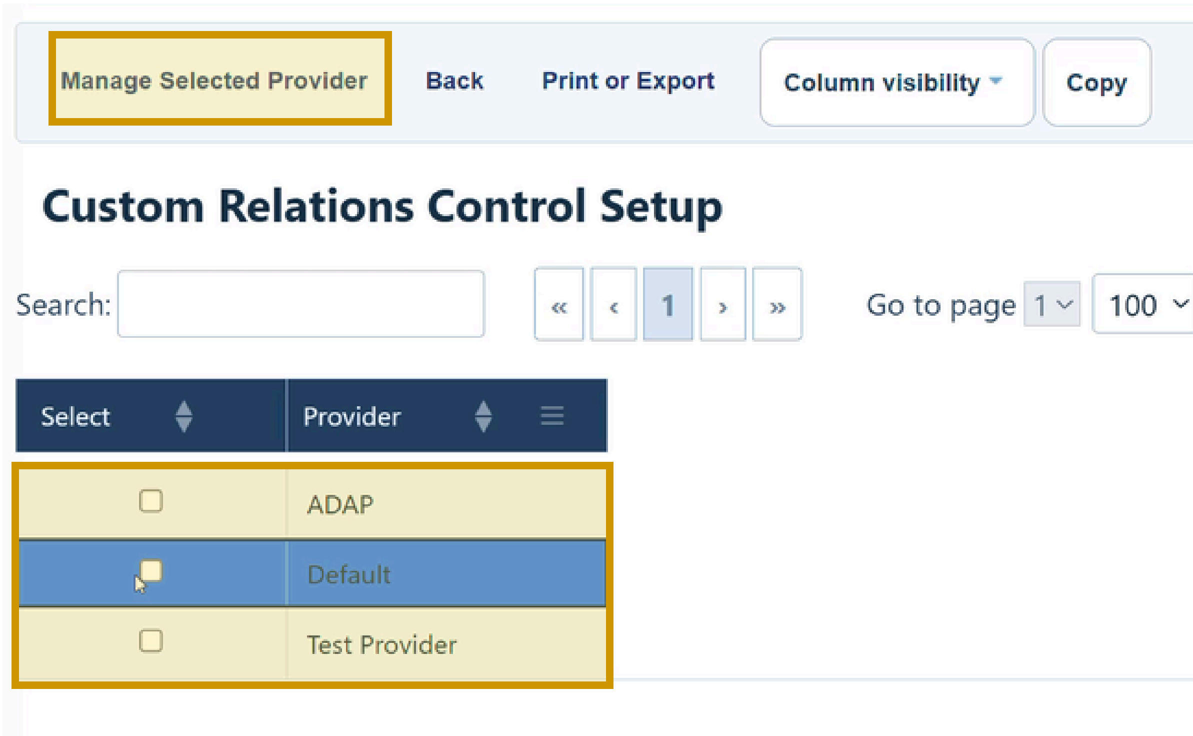


Step 4. **Click Custom Relations Fields.**



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.



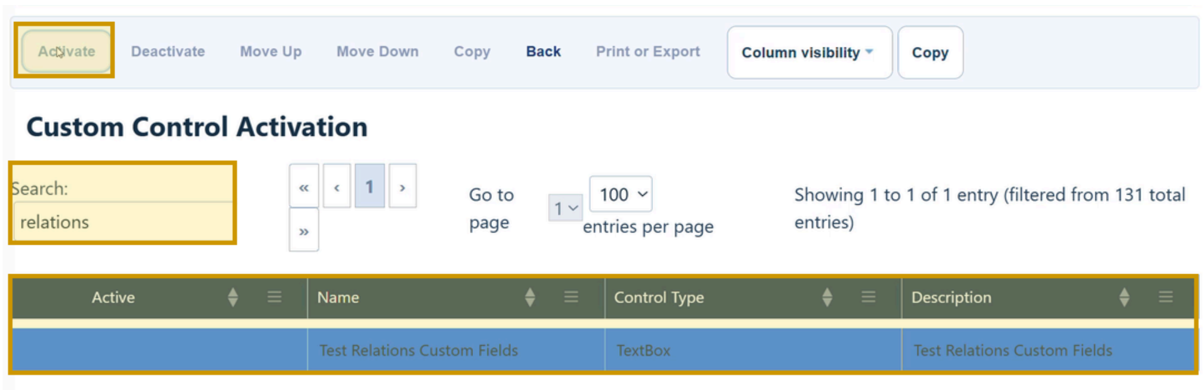
Important

Changes made here apply to the selected provider. Verify the provider before activating, deactivating, copying, or reordering fields.

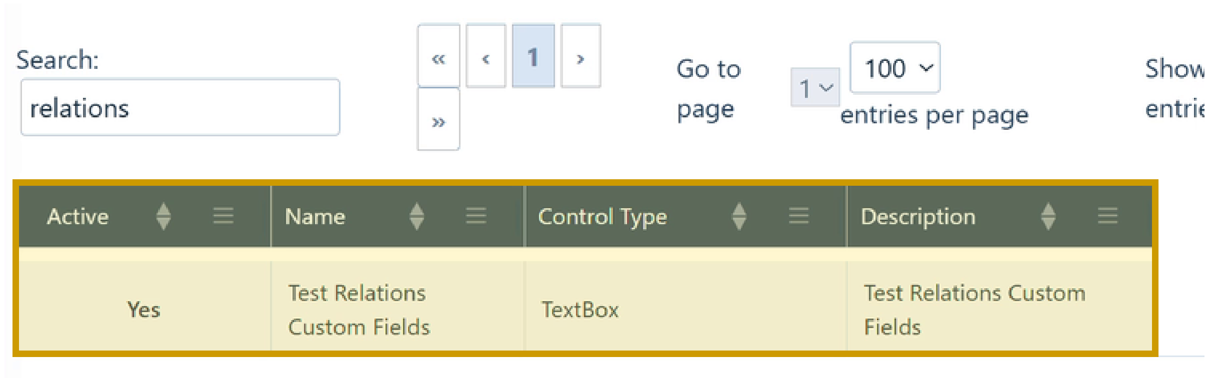
Activate and order a custom field

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

Step 7. Select the control, then click Activate.



Step 8. **Confirm that Active displays Yes for the control.**



Step 9. **Select an active control and click Move Up or Move Down until it appears in the preferred order.**

Deactivate a field

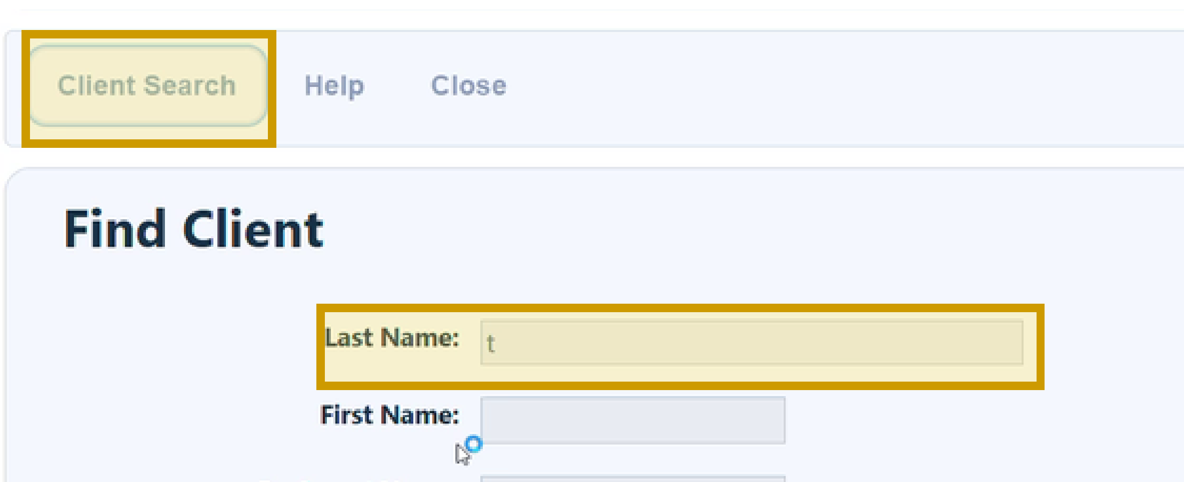
Step 10. **Select the active control and click Deactivate.**

> **Important**
>
> Deactivating a custom relation field stops displaying it for new or edited relationship records. It does not delete the control definition or remove historical values already stored with relationship records.

Verify the field in a client relationship

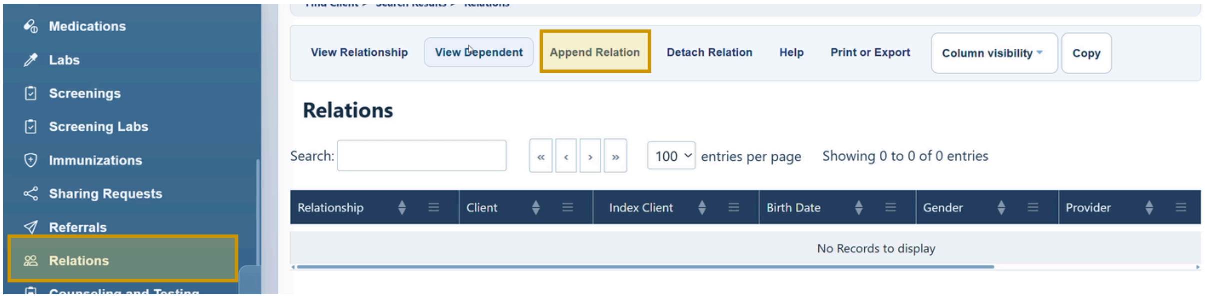
Step 11. **Switch to the provider where the field was activated.**

Step 12. **Click Find Client, enter a search term, click Client Search, select the client, and click View Details.**



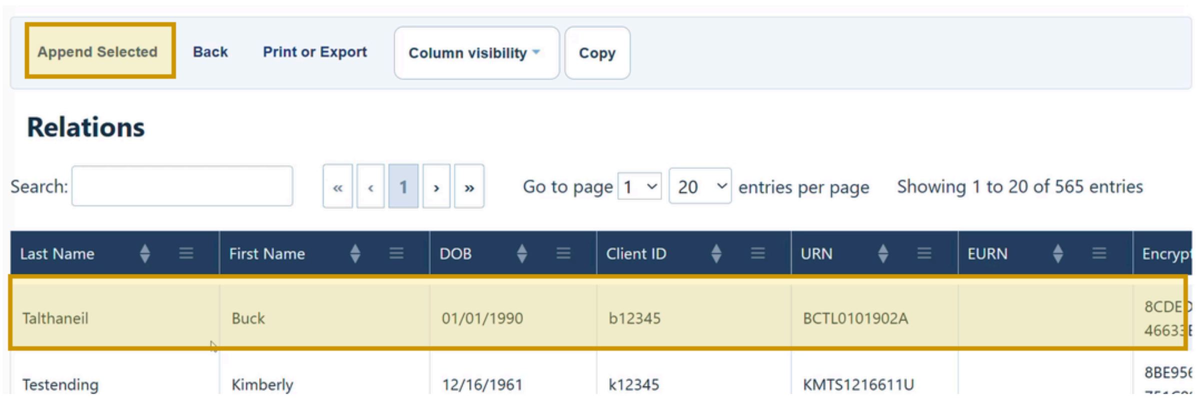
Step 13. **In the client record, click Relations.**

Step 14. **Click Append Relation.**



Step 15. **Search for the dependent client.**

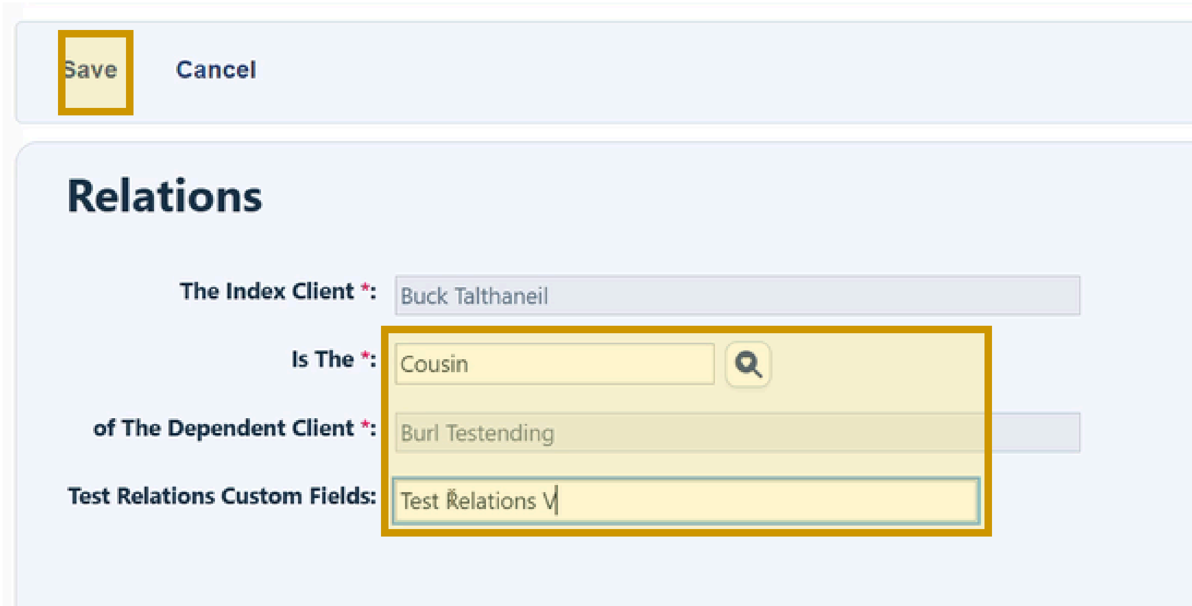
Step 16. **Select the dependent client, then click Append Selected.**



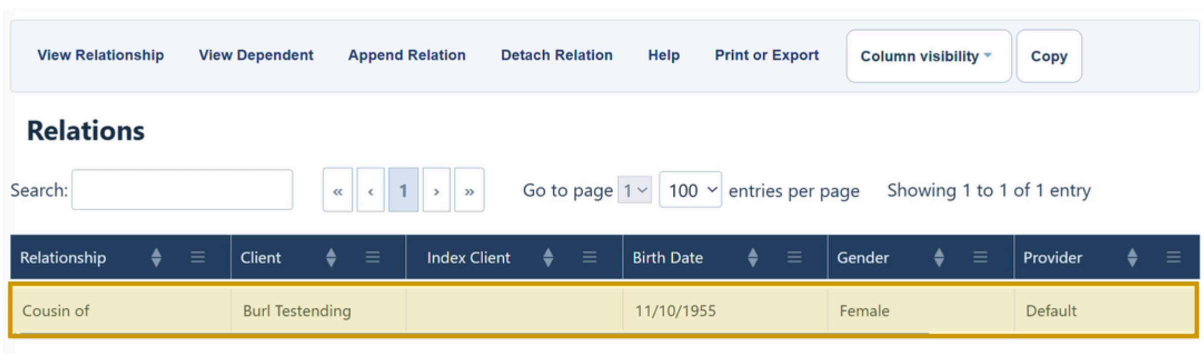
Step 17. **In Is The, select the relationship type.**

Step 18. **Enter the relationship-specific value in the custom relation field.**

Step 19. **Click Save.**



Step 20. **Confirm that the relationship appears in the Relations list.**



Important

CAREWare creates the corresponding relationship record for the dependent client. Detaching the relation removes the link from both client records, so confirm the selected clients before saving or detaching.

Custom Control Activation buttons

Button	What it does	When to use it
Manage Selected Provider	Opens the activation list for the selected provider.	Use after selecting the provider in Central Administration.
Activate	Adds the selected control to the provider's Relations entry screen.	Use when the field should be collected for relationship records.
Deactivate	Removes the field from new or edited Relations entries without deleting its definition.	Use when the field should no longer be displayed.
Move Up / Move Down	Changes the field's position on the Relations entry screen.	Use to place related fields in a logical order.
Copy	Copies the selected activation settings where supported.	Use only after confirming the destination provider and local change-control process.
Back	Returns to the previous Custom Fields 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.

Relations buttons

Button	What it does
View Relationship	Opens the selected relationship record.
View Dependent	Opens the dependent client's record.
Append Relation	Starts a new relationship between the current client and another client.
Detach Relation	Removes the relational link from both client records.
Append Selected	Adds the highlighted client as the dependent client during relationship setup.

How to confirm it worked

- Open a test relationship in the selected provider and confirm the custom field appears in the expected order.
- Confirm required behavior, default values, length limits, and edit permissions.
- For a ComboBox, confirm that only the intended active values are available.
- Save a test value, reopen the relationship, and confirm the value is retained.
- Open the dependent client's Relations list and confirm the corresponding relationship record is present.

Helpful data-quality tips

- Use a ComboBox for standardized relationship information that must be counted, grouped, or reported consistently.
- Use a TextBox for short values and a Memo for longer narrative information. Do not duplicate the built-in Is The relationship type in a custom field.
- 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.
- If a ComboBox choice has been used, deactivate it instead of deleting it so historical records remain understandable.
- Use Toggle Edit by Permission for sensitive or controlled relationship information and test each applicable role.

Important

Required fields and default values affect every relationship entry where the control is active as well as imported relations records. Require a value only when staff can consistently obtain it, and test the workflow before production use.

Tip

After a control contains production data, do not change its meaning. Create a new control when the business meaning changes, then deactivate the old control after reviewing reports, imports, exports, and staff workflows.

Troubleshooting and common questions

Why is the control not listed?

Confirm that the control definition exists under Custom Control Setup. Refresh the list using Resetting the Custom Field List when appropriate.

Why does an active field not appear on the Relations entry screen?

Confirm the correct provider, verify that Active displays Yes, refresh the client record, and reopen the relationship entry screen.

Why does Save fail?

Complete required fields, verify the custom control's 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, add or activate values under Edit Values, and confirm the intended values are active.

Why is the relationship not listed after saving?

Confirm that Save completed, refresh the Relations list, and verify that the correct index and dependent clients were selected.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain control definitions before activating them for Relations.
Relations	Add, view, and detach relationships between client records.
Find Client	Locate and open the index or dependent client 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.
Custom Fields	Open the CAREWare Custom Fields section for related setup guides.
Manage User Group	Update user permissions by group