

Custom Service Data Entry Rules

Purpose	Create provider-specific service data comparisons that display a message or stop a service record from being saved when the rule condition is met.
Who should do this	CAREWare administrators, data managers, or designated support staff with access to Administrative Options and Custom Features.
Use this setup when	Service entry must be checked against another service field, eligibility date, or compatible custom service field.
Main warning	Prevent record save can block service entry. Confirm the provider and subservice scope, then test the rule before production use.
Video walkthrough	Custom Service Data Entry Rules Video

Quick path

Administrative Options > Custom Features > Custom Service Data Entry Rules > select provider > Manage Selected Provider > Add

Before you begin

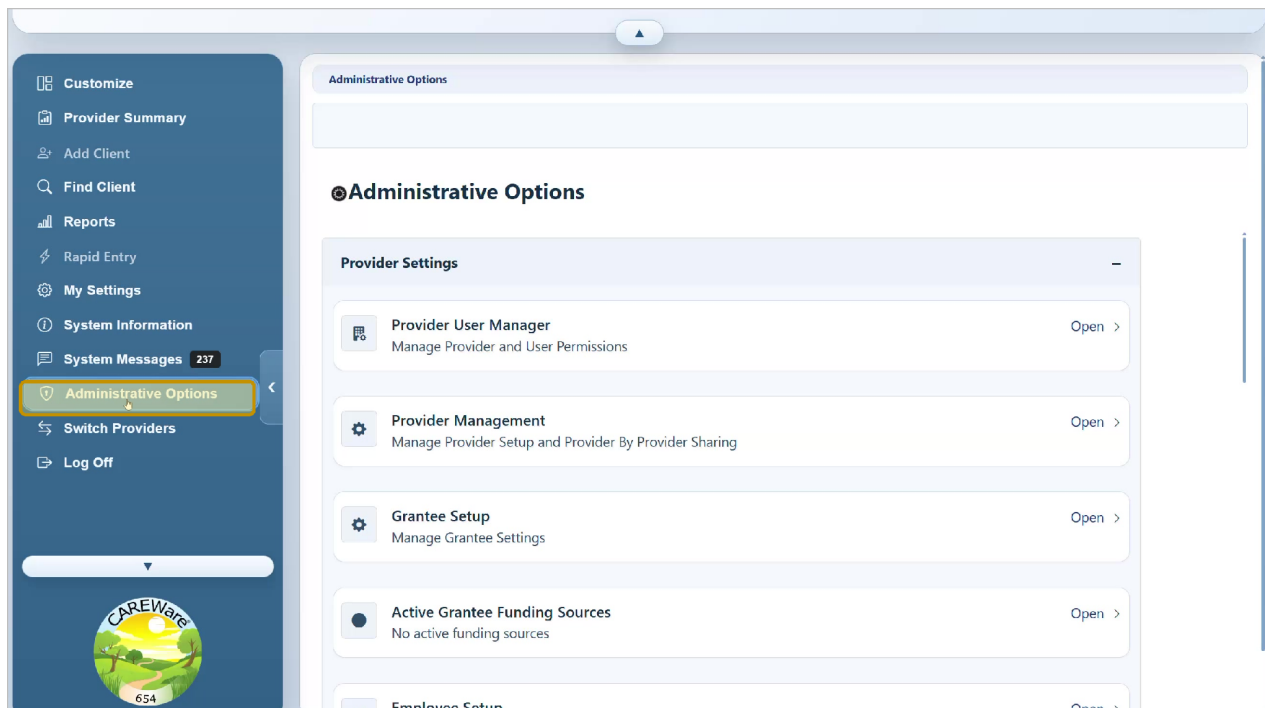
- Identify the provider and the subservice scope. Use All Subservices only when the rule should apply broadly.
- Write the comparison that should trigger the rule, including the two fields and the operator.
- Compare compatible data types, such as a date field with another date field.
- Create and activate any custom service field first using [Custom Control Setup](#) and [Service Custom Fields](#).
- Draft a brief user message that explains how the service value must be corrected.

Important

A rule is provider-specific. If Prevent record save is selected, CAREWare can block the service record whenever the configured comparison is true. Test both valid and invalid values before release.

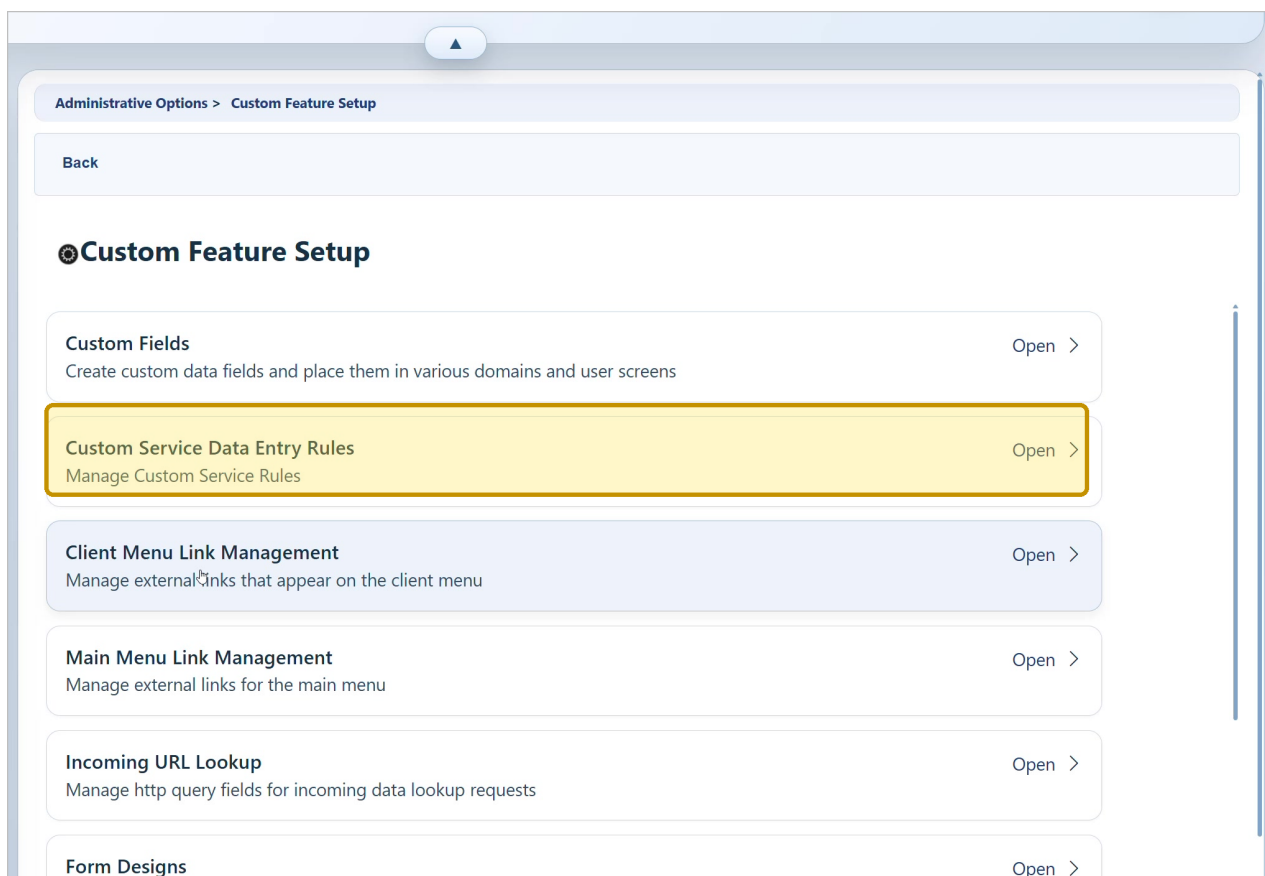
Open Custom Service Data Entry Rules

Step 1. Click Administrative Options.



Step 2. Open Custom Features.

Step 3. Click Custom Service Data Entry Rules.



Select the provider

Step 4. In Central Administration, select the provider and click Manage Selected Provider. If you are already inside one provider, skip this step.

Administrative Options > Custom Feature Setup > Custom Service Rules

Manage Selected Provider Back Print or Export Column visibility Copy

Custom Service Rules

Search:

« < 1 > » Go to page 1 of 100 entries per page Showing 1 to 3 of 3 entries

Provider

- ADAP
- Default
- Test Provider

Important

Changes made here apply to the selected provider. Verify the provider before adding, deleting, copying, or filtering rules.

Start a new rule

Step 5. Click Add.

Administrative Options > Custom Feature Setup > Custom Service Rules > Default

Add Set Subfilter Delete Back Print or Export Column visibility Copy

Default

Search:

« < > » 100 entries per page Showing 0 to 0 of 0 entries

CustomFieldNa...	Operator	SelectFieldName	Action	User Message
No Records to display				

Configure the comparison

Step 6. In Subservice, keep All Subservices or use the search button to select a subservice.

Step 7. Select the Service Field that CAREWare should evaluate.

Step 8. Select the comparison Operator.

Step 9. Select the second field in Select Field.

The screenshot shows a web application interface for configuring custom service rules. At the top, a breadcrumb trail reads: "Administrative Options > Custom Feature Setup > Custom Service Rules > Default". Below this is a bar with "Save" and "Cancel" buttons. The main content area is titled "Default" and contains a yellow-bordered configuration box. Inside this box, the following fields are visible: "Subservice:" with a dropdown menu showing "All Subservices" and a search icon; "Service Field:" with a dropdown menu; "Operator:" with a dropdown menu; "Select Field:" with a dropdown menu; "Prevent record save:" with an unchecked checkbox; and "User Message:" with a large text area. The "Default" title and the configuration box are highlighted with a yellow background.

Step 10. Select Prevent record save when the comparison should block saving.

Step 11. Enter a clear User Message.

Step 12. Click Save.

Review the completed rule

The rule condition is Service Date <= Eligibility Date, and the message tells the user that the service must occur after the eligibility date.

Administrative Options > Custom Feature Setup > Custom Service Rules > Default

Save Cancel

Default

Subservice: All Subservices

Service Field: Service Date

Operator: <=

Select Field: Eligibility Date

Prevent record save: ☒

User Message: Service Must be after eligibility Date

Operator reference

Operator	Meaning
<	The first field is earlier than or less than the selected field.
<=	The first field is earlier than, less than, or equal to the selected field.
=	The two field values are equal.
>	The first field is later than or greater than the selected field.
>=	The first field is later than, greater than, or equal to the selected field.

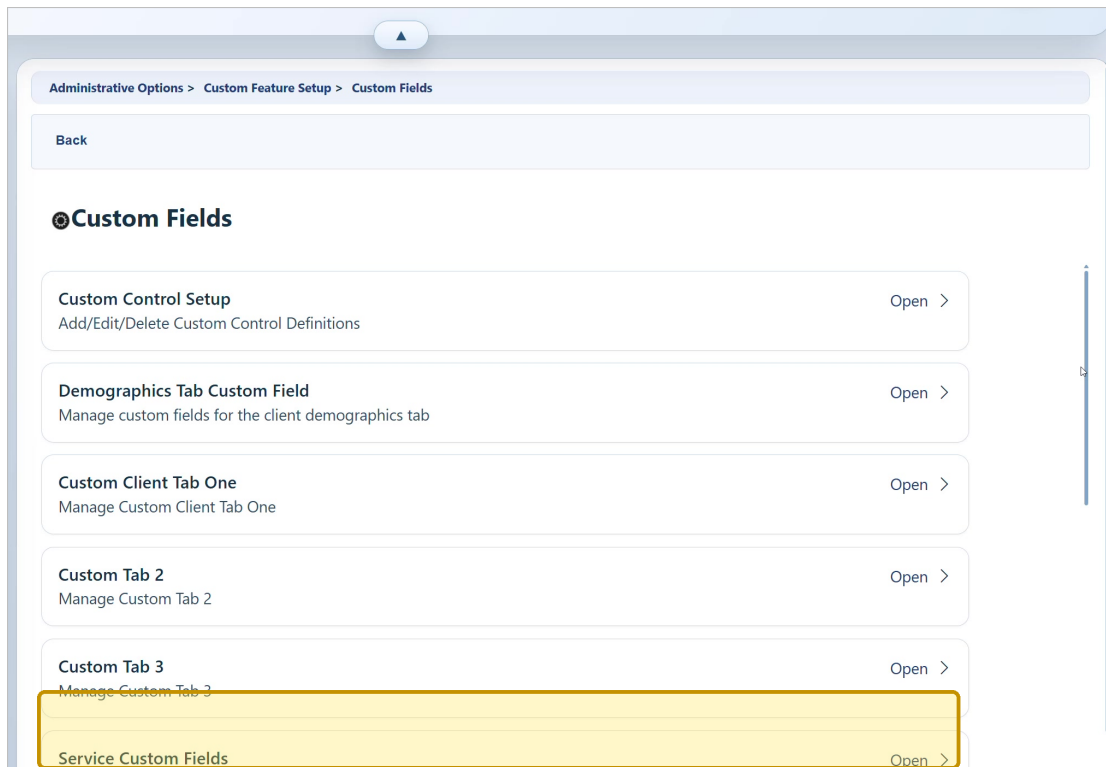
Tip

Write the rule as a sentence before saving it: "When [Service Field] [Operator] [Select Field], show this message and optionally prevent saving." This makes reversed operators easier to plan.

Use a custom service field in a rule

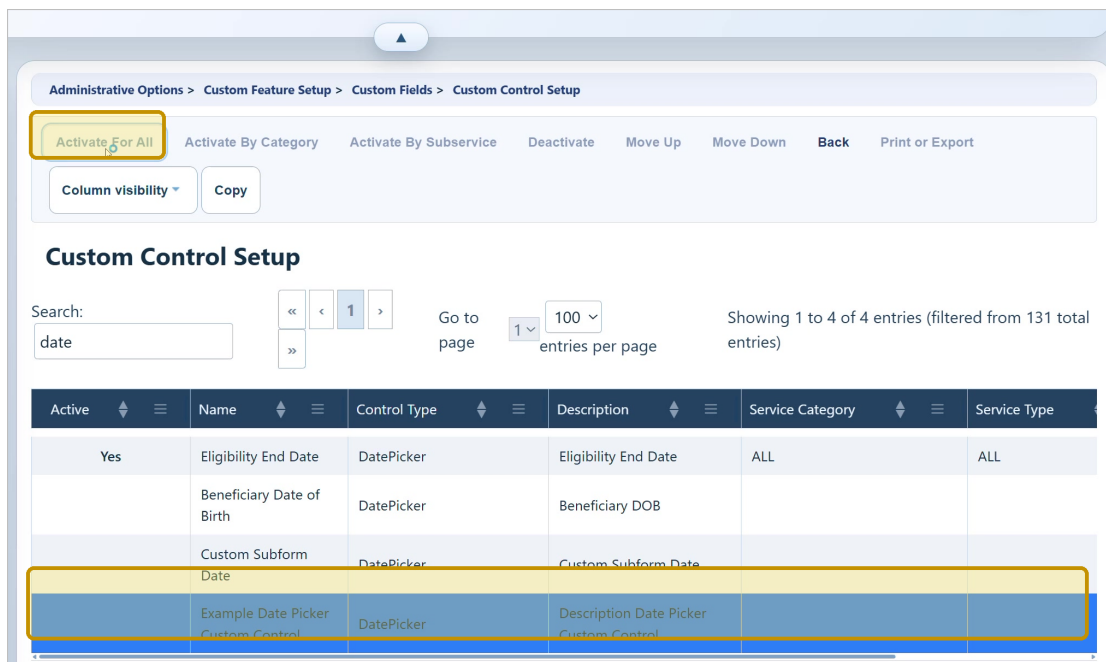
A custom control must be activated for service entry before it appears in the Service Field list.

Step 13. Open Administrative Options > Custom Features > Custom Fields > Service Custom Fields.



Step 14. Search for and select the custom control.

Step 15. Click Activate For All, Activate By Category, or Activate By Subservice, based on the intended scope.



Important

Create the control with a compatible type before activation. For date comparisons, use a DatePicker. See [Custom Control Setup](#) for control-type guidance. Do not repurpose a control after it contains production data.

Create a rule with the custom service field

Step 16. Return to Custom Service Data Entry Rules for the provider, then click Add.

Administrative Options > Custom Feature Setup > Default

Add Set Subfilter Delete Back Print or Export Column visibility ▾ Copy

Default

Search: « < > » 100 ▾ entries per page Showing 0 to 0 of 0 entries

CustomFieldNa...	Operator	SelectFieldName	Action	User Message
No Records to display				

Step 17. Select the activated custom service field in Service Field.

Step 18. Choose the Operator and a compatible comparison field.

Step 19. Set Prevent record save as needed, enter the User Message, and click Save.

Administrative Options > Custom Feature Setup > Default

Save **Cancel**

Default

Subservice: All Subservices

Service Field: Example Date Picker Custom Control

Operator: >= ▾

Select Field: Service Date

Prevent record save: ☒

User Message: Service must be before date field

Important

Selecting Prevent record save produces a red error message containing the user message when a user attempts to save a record that violates the rules. If that is unchecked, users get a yellow message as a warning, however can still save the record.

Rule fields and list actions

Field	How to use it
Subservice	Limits the rule to All Subservices or a selected subservice.
Service Field	The first value in the comparison. This list can include built-in fields and activated custom service fields.
Operator	Defines how the first field is compared with the selected field.
Select Field	The second value in the comparison.
Prevent record save	Blocks saving when the comparison is true.
User Message	Explains why the value is not accepted and what the user should correct.

List actions

Button	Use
Add	Create a new service data entry rule.
Set Subfilter	Limit the rule list to a selected subset for review.
Delete	Remove the selected rule after confirming its provider and scope.
Print or Export	Document the current rule list for review or change control.
Column visibility	Show or hide optional grid columns.
Copy	Copy selected list data where supported; verify the destination before use.

Validation checklist

- Test values that are before, equal to, and after the comparison date or threshold.
- Confirm the rule appears for the intended provider and subservice only.
- Verify the message is specific enough for staff to correct the entry.
- Confirm blocking behavior when Prevent record save is selected.
- Test with a non-production client and service record when available.

Important

Coordinate rule changes with staff training and reporting workflows. A reversed operator or broad All Subservices scope can affect many service records immediately.

Troubleshooting and common questions

Why does the rule not apply?

Verify the provider, subservice scope, operator direction, selected fields, and the actual values entered on the service record.

Why are users blocked from saving valid services?

Review the operator and field order. Test the equality boundary, especially when using <= or >=.

Why does the rule affect more services than intended?

Check whether All Subservices was selected. Recreate or update the rule for the correct subservice scope.

Related CAREWare guides and resources

Resource	How it helps
Custom Control Setup	Create and maintain control definitions before using them in service rules.
Service Custom Fields	Activate custom controls for service entry by provider, category, or subservice.
Custom Field Usage	Review where custom controls are active and how they are used.
Resetting the Custom Field List	Refresh lists when a new or changed custom field is not displayed.
Custom Field Templates	Include custom service fields in import and export templates.
Custom Fields	Open the CAREWare Custom Fields knowledge-base section.