Custom Fields

Description: In this topic, the user will learn when custom fields can be created, how to add, search, view, edit, or export a custom field, and how to add or edit custom field values for a specific object. Custom fields are a way to add any additional required information that is not already listed in one of the DCI form wizards. The Custom Field Definitions feature is found in the Settings module and allows the organization to customize fields.

Role Required: Super User

Permission Required: Custom Field Admin

Custom Fields can be created for:

- Client Profile
- Employee Profile
- Funding Source
- Authorization
- Residential Program
- Day Program
- Case Worker Profile
- Group Service
- Parenting Program
- Guardian
- Cost Center
- Service Code
- Regions
- Client Funding Account
- Employee Service Account
- Client Service Account
- Plan Of Care
- Goal
- Task
- Note
- Batches
- EVV Locations
- Entries
- Vendor Service Account - FI Mode Only
- Vendor Profiles - FI Mode Only

Add Custom Field

1. Log in with personal profile
2. Click **Settings** on the main menu
3. Click **Custom Field Definitions** on the submenu
4. Click **Actions**
5. Select **Add New Custom Field** from the drop-down menu
6. Complete the Add New Custom Field form wizard
7. Click **Save** to continue and **Yes** to confirm

View, Edit, Search, or Export for a Custom Field

1. Log in with personal profile
2. Click **Settings on** the main menu
3. Click **Custom Field Definitions** on the submenu

4. Enter search criteria in the filters and click the **Search** button
    a. The results table below the search box will update based on the search criteria
    b. Optionally, select the **Export** button to export.
5. View a Custom Field Definition by clicking anywhere in the row to open the Custom Field details page
6. Click **Actions**
7. Select **Edit Custom Field** from the drop-down menu
8. Make edits in the Edit Custom Field form wizard
9. Click **Save** to continue and **Yes** to confirm

Custom Fields Values

Description: Custom Fields Values can also be added for individual items via the object details page using the Add/Edit wizard or using the Edit Custom Field Values wizard.

Role Required: Super User, or role that has access to the object being edited/viewed

Permission Required: Permission that has access to the object being edited/viewed

View or Edit Custom Field Values for Object

1. Log in to personal profile
2. Navigate to the desired details page by selecting an object (i.e., Client, Region, Goal, etc.)
3. Select the **Custom Fields tab** beneath the details
    a. View the Custom Fields table where the values can be viewed and filtered
4. Click **Actions**, then select **Edit Custom Field Values** from the drop-down menu
    a. All custom fields that exist in the system will appear in the wizard. All fields are optional.
    b. If the Custom Field has a default value, it will display in the form field.
    c. Hover over the information icon to read help text
    d. Hover over the question mark icon to see whether or not the field is required for EDI
5. Click **Save** to continue and **Yes** to confirm

*Please note: Users who have access to the Reports Module can view Custom Field Values across multiple items on the Custom Field Values Report. The results can be compared to the appropriate item type report using Excel formulas, such as a Vlookup formula. For example, to see all custom field values for Employee Profiles, the user would run a Custom Field Values Report and an Employee Report and compare the Item Id on the Custom Field Values Report to the Profile Id column on the Employees Report.

Related articles

- Phone Carrier and Phone Type - Custom Fields
- April 2021 Release Notes
- What Are Custom Fields?
- Custom Fields