

Guidebook on Managing User-Defined Fields

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1.0 Purpose

User-defined or custom fields (UDF) allow Centers/Programs to leverage NIRS in a way that is individualized to the specific needs of their training Program. Each dataset has up to ten fields and can be text boxes or drop-down lists.

This resource is intended to broadly inform how network organizations leverage NIRS UDF's within each dataset to inform training initiatives, internal tracking, and other historical contexts separated into eleven (11) categories:

- 1) Personal Information,
- 2) Training/Research/Supervisory/Employment History or Background,
- 3) Motivation for disability work,
- 4) Accomplishments,
- 5) Goals/Objectives/Strategic Priorities,
- 6) Logistical Information,
- 7) Equity, Diversity, and Inclusion (ED&I),
- 8) Capacity Building,
- 9) Project-specific Information,
- 10) Narrative/Reflections, &
- 11) Other Observations.

2.0 Creating User-Defined Fields

User-defined fields are managed in the Admin dataset. Please see below for a step-by-step walk-through on how to create them:

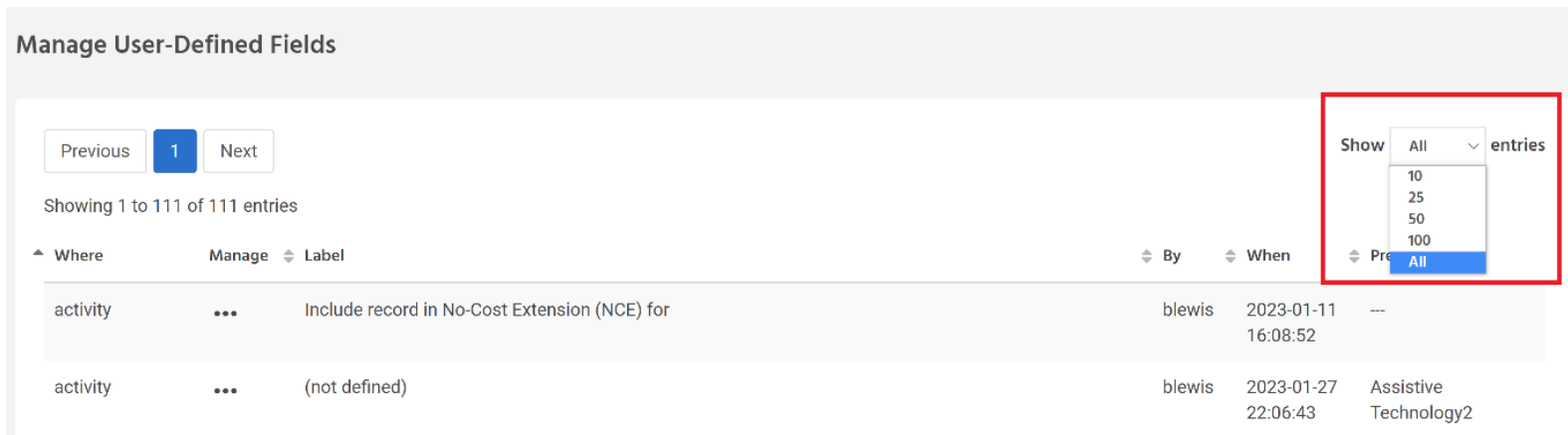
Note: Only NIRS administrators can add/edit user-defined fields.

- 1) Go to the Admin dataset and select “Manage User-Defined Fields” from the navigation menu. Under “show entries”, click the drop-down menu and select “all”.

The screenshot displays the 'Manage User-Defined Fields' page within the Admin dataset. At the top, a navigation bar includes 'Dashboard', 'Trainees', 'Projects', 'Activities', 'Products', 'Goals', 'Directory', and 'Admin' (which is highlighted). Below the navigation bar, the page title is 'Manage User-Defined Fields'. A pagination control shows 'Previous', '1', '2', '3', '4', '5', '...', '12', and 'Next'. Below this, it says 'Showing 1 to 10 of 111 entries'. A table with columns 'Where', 'Manage', and 'Label' lists several user-defined fields. To the right, a dropdown menu is open, showing options under 'MANAGE USER RECORDS' and 'MANAGE DATA'. The option 'Manage User-Defined Fields' is highlighted with a red box.

Where	Manage	Label
activity	...	Include record in No-Cost Extension (NCE) for
activity	...	(not defined)
activity	...	Product Disseminated (Name and Quantity)
activity	...	Strategic Priority - Health
activity	...	Strategic Priority - Transition & Adult Life Services

- MANAGE USER RECORDS
 - Manage Activity Staff
 - Manage NIRS Users Login
 - Ownership Transfer
- MANAGE DATA
 - Program Performance Reports (PPRs)
 - Five Year Closeout Report Reports
 - DGIS Export, Data Review 1998-2018
 - DGIS Export, Data Review 2019+
 - Import
 - Export
 - Manage User-Defined Fields**
 - CARES Evaluations
 - Resource Library



2) The “where” column located on the far left-hand side details which dataset the user-defined field will appear. The table below lists each option under the “where” column and the form in which the field will appear.

Options in the “Where” column	Mapping to the online form
Activity	Activity dataset (all core functions)
Product	Products dataset (all material types)
Project	Projects dataset
Survey DBP	DBP trainee survey form
Survey LEAH	LEAH trainee survey form
Survey PPC_Long	PPC trainee survey form
Survey UCEDD	UCEDD-Only survey form
Survey	LEND/UCEDD and LEND-only trainee survey
Trainee ST	Trainee dataset > Add short-term trainee

Trainee	Trainee main record (long/med term trainee form)
Trainee year	Annual/year trainee record form

3) To add a new field, locate the corresponding option next to the “where” column. Select “edit” by clicking the three dots.

Note: User-defined fields that are not currently in-use will have “(not defined)” next to the field label.

4) Next to “text”, type in the question or field header for the desired field.

Where	Field	Label
survey	text1	(not defined)

Choices for dropdown list, one per line:

* Maximum option length per line is 225 characters. Press the enter key after each line to add a new line.

Required
 Inactive

- Under the dropdown list, Enter options on each individual line. Leave this blank to create the field as a textbox (i.e., the trainee will type in a response).

- Check the box “required” to make it required to save the form.
 - Check the box “inactive” if you do not want the field viewable on the form. Leave it unchecked to make the field viewable on the form.
- 5) Save the page. User-defined fields will appear at the bottom of the page on the form on which they were created.

Example of a User-Defined field (textbox) in the Trainee’s main record:

Social Media Tag

3.0 Categories

Below are examples of how Centers/Programs have historically used UDFs within each dataset in NIRS.

Note: All categories and examples are intended as such. Each Center/Program may adapt UDFs for its own unique training purposes and internal tracking needs.

3.1 Trainee Main Record			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Personal Information	Birthdates	Textbox	<ul style="list-style-type: none"> • The trainee’s date of birth to send tchotchkes, congratulations, and/or plan an in-office or virtual party



	Geographical information	Drop-down list or Textbox	<ul style="list-style-type: none"> • To track if the trainee is an in or out-of-state trainee, which may be helpful when tracking trainees who leave the state after completing the training Program • Contact information for foreign exchange trainees (e.g., zip code, region, country, and address) to increase survey response rates • To identify trainees who live in a rural or frontier area for ED&I and reporting purposes
	Social Media Presence	Textbox	<ul style="list-style-type: none"> • LinkedIn, Twitter, Facebook, or other social media tags to increase survey response rates
	Emergency Contact Information	Textbox	<ul style="list-style-type: none"> • Additional contact information (beyond what is provided on the form), such as contact information for an alternative emergency contact person. Examples may include their name, email/phone number, and if permission is provided to notify their emergency contact

			<ul style="list-style-type: none"> To track if the trainee has completed confidentiality paperwork and/or confidentiality training
Training Background	Previous or current mentors/supervisory history	Drop-down list or Textbox	<ul style="list-style-type: none"> To track trainee discipline supervisor or faculty/staff supervisor To identify faculty/staff the trainee collaborates with on their products. This may be helpful for trainees completing a dissertation to track trainee progress/involvement
	Academic history	Drop-down list or Textbox	<ul style="list-style-type: none"> To identify courses (e.g., course name or course number) that the trainee is enrolled in
	Program track or training focus	Drop-down list or Textbox	<ul style="list-style-type: none"> To identify the trainee’s focus or training track, such as research, education, advocacy, or policy To track if the trainee is enrolled in a sub-specialization or program track based on Center/Program structure (e.g., focus on aging communities, transition services, etc.)

3.2 Trainee Annual Record			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Research background		Drop-down list	<ul style="list-style-type: none"> To track a trainee’s research interests in Fetal Alcohol Spectrum Disorder (FASD), rehabilitation for specific mental or cognitive conditions, universal/accessible design, plain language, or autism spectrum disorder-related research
Supervisory History	Training Oversight/Supervision	Drop-down list or Textbox	<ul style="list-style-type: none"> To track trainee discipline supervisor or faculty/staff supervisor To identify faculty/staff the trainee collaborates with on their products. This may be helpful for trainees completing a dissertation to track trainee progress/involvement

3.3 Trainee Short-Term Record			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Personal Information	Geographical Information	Drop-down list or Textbox	<ul style="list-style-type: none"> To track if the trainee is an in or out-of-state trainee, which may be helpful when tracking trainees who



			<p>leave the state after completing the training Program</p> <ul style="list-style-type: none"> • Contact information for foreign exchange trainees (e.g., zip code, region, country, and address) to increase survey response rates • To identify trainees who live in a rural or frontier area for ED&I and reporting purposes
	Emergency Contact	Drop-down list or Textbox	<ul style="list-style-type: none"> • Additional contact information (beyond what is provided on the form), such as contact first and last name, email, and phone number, and if they provided permission to notify their emergency contact • To track if the trainee has completed confidentiality paperwork and/or confidentiality training
	Training history	Drop-down list	<ul style="list-style-type: none"> • Location or satellite facility where the trainee attended training(s) • Faculty/staff discipline coordinator or supervisor

3.4 Former Trainee Surveys

Category	Sub-Category	Field Type(s)	Contexts / Examples
Training/ Employment History	Feedback on training experience	Textbox	<ul style="list-style-type: none"> • How the training Program can be improved to support Self-Advocates and those with lived experience • To gauge feedback on their trainee alumni career path if the trainee is not currently working in an MCH or disabilities-related field • To gauge topics that the alumni would find helpful based on current events, technological, cultural, political, and health climate/environment and how it has changed the trajectory of their career
	Amount of time spent at facility/training locations	Textbox	<ul style="list-style-type: none"> • To track hours spent at each training site to assist with tracking internship hour requirements in their academic program across various settings (e.g., clinical, home

			health, outpatient, inpatient, community, etc.)
	Current/previous volunteer history	Textbox	<ul style="list-style-type: none"> To provide additional information on any internships, volunteer, or shadowing experience in disabilities since graduating from the training Program
	Feedback on important training topics/professional development opportunities	Drop-down list or Textbox	<ul style="list-style-type: none"> To identify topics areas and skills that they learned during the training Program that were most/least valuable in their career at 2-, 5-, and 10-years post-completion from the Program To gauge if they feel that their training experience is valued by their organization Feedback on the training Program has advanced their career. Topic areas include research, cultural competence, advocacy, education, interdisciplinary work, policy, plain language, public health/community, and leadership

			<ul style="list-style-type: none"> • Feedback on how the family or self-advocate perspective has affected their current work
	Current and previous licensures	Textbox	<ul style="list-style-type: none"> • Listing of credentials, licensure, or affiliated associations with which the alumni are associated
Motivation for disability work	Barriers and access in the trainee’s geographical area	Textbox	<ul style="list-style-type: none"> • Identifying major barriers to accessing care for people with disabilities in the alumni’s geographic area • Dialogue section/testimonials on how the alumni have advocated for people with disabilities
Personal information	Collaboration/ Partnerships	Drop-down list	<ul style="list-style-type: none"> • To gauge alumni interest in returning as a guest speaker or mentor to current trainees (yes/no)
	Social Media Presence	Textbox	<ul style="list-style-type: none"> • LinkedIn, Twitter, Facebook, or other social media tags to increase survey response rates
	Preferred Pronouns	Drop-down list or Textbox	<ul style="list-style-type: none"> • Options include He/Him; She/Her; They/Them; Fae/Faer; Ze/Hir; Xey/Xem/Xyr; It/Its/Itself; Xe/Xem; E/Em; Ve/Ver/Vis; Per/Pers; Abstain; I go by a different term (textbox)

	Sexual Identity	Drop-down list or Textbox	<ul style="list-style-type: none"> Options include Heterosexual; Homosexual; Bisexual; Demisexual; Pansexual; Asexual; Omnisexual; Questioning; Abstain; I go by a different term (textbox)
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3.5 Project Dataset			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Accomplishments		Textbox	<ul style="list-style-type: none"> Achievements or progress made because of the project toward the work plan and/or strategic priority areas, split up into local, state, national, research, cultural competence, university, and other domain areas
Goals/Objectives/ Strategic Priorities		Drop-down list or Textbox	<ul style="list-style-type: none"> Indicating which strategic priority the project is supporting: Behavioral Health, Early Childhood Services, Health, Transition & Adult Life Services, or Administrative To track specific objectives, expected benefits, or features that



			the project supports in connection with the work plan
Logistical Information	Staff/faculty support and facility logistics	Drop-down list	<ul style="list-style-type: none"> Satellite facility/location where grant funds are centralized Name of the project coordinator/project manager overseeing the project
	Access information	Textbox	<ul style="list-style-type: none"> Project social media presence or webpage
	Associated activities	Drop-down list or Textbox	<ul style="list-style-type: none"> The titles and number of activities developed related to a funding opportunity

3.6 Activities Dataset			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Logistical Information	Specific topical areas for the activity	Drop-down list or Textbox	<ul style="list-style-type: none"> To identify activities related to university/college services, fellowship/honors students, cultural diversity, assistive technology, historically marginalized populations (e.g., Tribal, Hispanic), health and wellness promotion, early childhood and youth,

			<p>individual advocacy and family supports, adult community living, aging and developmental disabilities, interdisciplinary university training(s), policy, program development, and quality assurance</p> <ul style="list-style-type: none"> • To flag activities that should be included in the Autism CARES report • To track specific referrals that are made during the activity • The titles of products/deliverables that were created from the work of the activity
	Geographical Information	Drop-down list or Textbox	<ul style="list-style-type: none"> • The satellite facility, location, or address where the activity took place
Goals/Objectives/ Strategic Priority		Drop-down list	<ul style="list-style-type: none"> • Identifying activities addressing strategic priorities in equity inclusion and diversity work, health disparities, health, transition, adult life services, autism, workforce capacity building, intellectual and developmental disabilities, Mission

			<p>Enhancement Support, Behavioral Health, Education and Learning in Schools, the Community, and Workplace, Health, Employment, Community, & Independent Living</p> <ul style="list-style-type: none"> To identify which goal that the activity is related to as part of the work plan
Equity, Diversity, and Inclusion (ED&I)		Drop-down list or Textbox	<ul style="list-style-type: none"> Flagging activities that include cultural/linguistic components, testimonials on first-hand experiences, and if the activity includes diverse and culturally representative collaborators (e.g., minority groups such as Hispanic, LGBT+ communities, tribal, refugee, immigrant, family members, or people with disabilities)
Capacity building initiatives	Partnership building	Textbox	<ul style="list-style-type: none"> A dialogue section to track program quality improvement efforts and feedback from collaborators on how to strengthen the initiative

			<ul style="list-style-type: none"> • Dialogue section to indicate additional areas of technical assistance that can be provided to collaborators or recipients
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3.7 Products Dataset			
Category	Sub-Category)	Field Type(s)	Contexts / Examples
Goals/Objectives/ Strategic Priorities		Drop-down list or Textbox	<ul style="list-style-type: none"> • If the product addressed strategic priorities in family-centered care, early childhood services, medical home, health disparities, adolescent health transition, cultural diversity, health, transition and adult life services, early education services, and administrative needs • To identify which goal the product is related to as part of the work plan
Project Specific Information		Drop-down list	<ul style="list-style-type: none"> • The satellite facility, location, or address connected with the deliverable • To differentiate and track deliverables related to specific

			<p>initiatives or grant opportunities (e.g., Act Early (LTSAE), specific clinics)</p> <ul style="list-style-type: none"> To flag deliverables related to specific federal reporting requirements (e.g., Center for Developmental Disabilities (CDD) annual reporting, OIDD-only products, MCH-only products)
Logistical Information	Product dissemination	Textbox	<ul style="list-style-type: none"> Anticipated or predicted dissemination of the product or sites in which the product was disseminated, which can then be compared to the actual number of disseminations from year to year

3.8 Goals Dataset			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Narrative/ Reflections		Textbox	<ul style="list-style-type: none"> Numbered (e.g., 1.0, 1.1, 2.0) dialogue section to indicate the impact on the Center/Program work plan or a SMART goal



3.9 Miscellaneous			
Category	Sub-Category	Field Type(s)	Contexts / Examples
Additional Observations	Incentives and Gifts	Textbox	<ul style="list-style-type: none"> To incentivize faculty/staff to complete accurate data entry To incentivize trainee alumni to complete the former trainee survey
	Verification/sign-off	Drop-down list	<ul style="list-style-type: none"> To indicate if a supervisor or NIRS administrator has reviewed and verified the record.
	Accessibility Information	Drop-down list or Textbox	<ul style="list-style-type: none"> To indicate if a trainee requires accommodations in the trainee’s main record form or former trainee survey form If the activity or product offered specific accommodations (e.g., ASL interpretation, English/Spanish captioning)

3.0 Background and Methodology

A total of 1,638 UDF’s were exported from NIRS across all training Center/Program/center types ([UCEDD](#), [LEND](#), [LEAH](#), [PPC](#), and [DBP](#)). The export included data on which dataset the UDF was



implemented in, the field name detailing how the field was titled if the field was required (yes/no), the date in which data collection began, field type (textbox/drop-down list), and field options. User-defined fields were implemented and collected in NIRS between 2004 and 2023 at the time of completion of this guidebook. All UDFs were sorted into eight categories based on which dataset data collection was implemented in: Trainees (Main record, Annual record, Short-term trainee record), former trainee surveys, Projects, Activities, Products, and Goals. An additional category was created for UDFs that were observed across all datasets and forms.

A comprehensive qualitative analysis of all UDFs from all Centers/Programs/centers was implemented to provide consistency, and analysis was conducted by two trained AUCD personnel who independently categorized each field. These categories were established after a preliminary breakdown and evaluation of data. Notes on question topics and subject matter were used to inform the initial model of themes/categories. Initial analysis found consistency in each category, which was then sorted into one of eleven primary categories. Primary categories include: Personal Information, Training/Research/Supervisory/Employment History or Background, Motivation for disability work, Accomplishments, Goals/Objectives/Strategic Priorities, Logistical Information, Equity, Diversity, and Inclusion (ED&I), Capacity Building, Project-specific Information, Narrative/Reflections, and Other Observations. Efforts were made to ensure anonymity and identifiable information was removed. Generalizations were made across all UDFs to further de-identify data points and contextualize potential benefits of individual field uses for program implementation/data collection within each primary and sub-category.

4.0 Questions

Please reach out to NIRS@aucd.org with any questions.

