

Custom Data Elements

Intended Audience

- Administrative Agencies
- Managers and Supervisors

Policy Background

Custom Data Elements (CDE) are a powerful feature that allows Administrative Agencies (AA) to establish customized, client-level data elements for the agencies that they manage. CDE are made up of Custom Data Groups which may contain one or more Custom Data Fields. Each group may be longitudinal (more than one record per client) or non-longitudinal (only one record per client). The data fields may be any one of these seven data types:

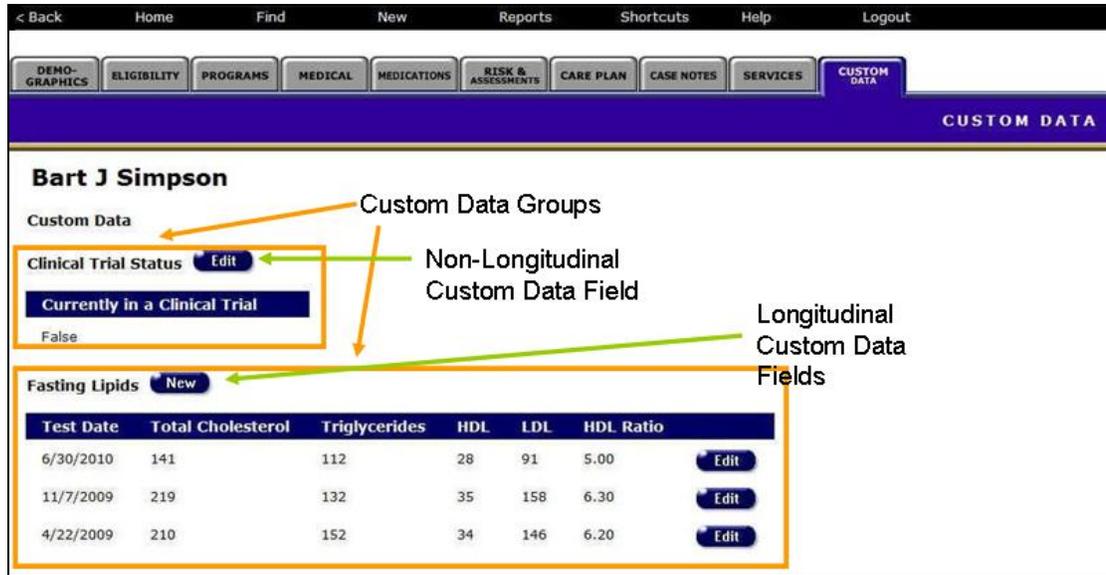
Data Type	Example
Boolean	Check boxes that can indicate answers like Yes/No or True/False.
Dates	Calendar dates in MM/DD/YYYY format.
Decimals	Numbers with decimals such as 10,000.00.
Dropdown	Dropdown lists with predefined responses.
Hyperlink	Hyperlinks to external websites that may include an encrypted query string value for the target website to use in establishing a client context.
Integers	Whole numbers up to 10,000.
Strings	Free text fields up to 7,750 characters long.

Administrative agencies (AA) can request the creation of up to 30 Custom Data Fields in any combination of groups (see “Procedures” below).

All users in agencies managed by the AA will be able view the CDE on the “Custom Data” screen (see Figure A). Each Custom Data Group will have its own section on this screen (highlighted in orange on Figure A). To access the individual data fields that are a part of each group, users with the appropriate permissions have to click the “New” or “Edit” button. Users will be able create, edit, and/or deactivate CDE based on their permissions.

Custom data for “share” clients within an AA will be visible to all the agencies within the AA that serve that share client. Custom data entered in one AA will not be visible to agencies outside that AA.

Within limits, CDEs can be edited or deactivated after initial setup. However, doing so can make permanent and irreversible changes to client and agency data. OA will not approve changes to CDE setup if, in their opinion, doing so would result in damage or loss to important data.



• Figure A. Custom Data Screen

Data collected via CDE can not be included in the Ryan White Annual Program Data Report (RDR), the Ryan White Services Report (RSR), the HOPWA Annual Progress Report (APR), or the HOPWA Consolidated Annual Progress and Evaluation Report (CAPER). CDE data is not available in the Crosstabs Wizard.

While all CDEs are available in ARIESReportExport, reporting on or analyzing CDEs is very different from reporting on or analyzing other ARIES data. All Fields are stored in the same table, even if they are in different Groups, and Fields are reported as rows, not columns. CDEs may also be exported, but the same limitations apply. AAs interested in CDEs should make sure they understand the report/export limitations before requesting CDEs. AAs may request access to the ARIES demonstrate site for the purpose of reviewing the report/export of CDEs.

Procedures

There is a five-step approval process for establishing CDE in an AA.

- 1) Agencies interested in CDE must discuss their proposed data fields with their AA. AAs may ask the agencies questions like “What is the business need for adding this custom data element to ARIES?” or “Can this data be captured using existing data elements in ARIES?”
- 2) If the AA supports the proposal, the AA must complete the Request for Custom Data Elements Form. It is important to answer all the questions fully and correctly. If approved, this document will serve as the specifications for the ARIES System Administrator to program the Custom Data Elements. For a copy of the Request for Custom Data Elements Form, please e-mail karl.halfman@cdph.ca.gov.
- 3) The State Office of AIDS (OA) will review the application, determine the feasibility, and render a decision. OA will notify the AA of the decision.
- 4) If the request is approved, the ARIES System Administrator will program the CDE. OA will notify the AA when the programming is complete.

- 5) The AA will then have three business days to review and approve the programming. The AAs and requesting agencies should ensure that the CDE works as expected before commencing with data entry. Because of system and resource limitations, OA may not be able to edit an existing CDE and will not perform manual updates to CDE data entered by agencies.

Additional Information

- Innovative and/or highly-request CDE may be replicated for other AAs to utilize and/or referred to the ARIES Partners for consideration as a future enhancement to ARIES system wide.
- The ARIES User Manual includes chapters on Custom Data Setup, Custom Data User Permissions, and Custom Data Entry. To access the ARIES User Manual, press the F1 key while in ARIES and search on "custom data."