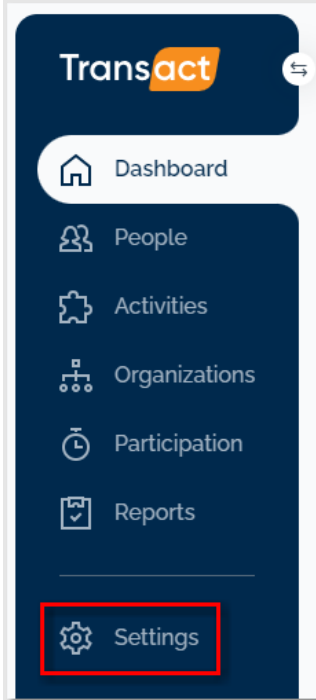


Managing Custom Fields

While SST tracks considerable data about the people you serve, the services you offer, and the organizations you work with, you can create additional data fields unique to your initiatives to support students experiencing homelessness.

Select the *“Settings”* tab in your lefthand navigation menu to create a custom field.



Select *“Custom Fields”* on the settings page.

Settings

Data Collection Periods

Define the date ranges into which program data will be segmented.



Custom Fields

Customize fields for People, Activities, Organizations.



You can create custom fields for People, Staff, Activities, or Organizations.

Click on the category for which you'd like to create a custom field.

Custom Fields ?

Participants

Manage forms and fields associated with Participants



Staff

Manage forms and fields associated with Staff



Activities

Manage forms and fields associated with Activities and Sessions



Organizations

Manage forms and fields associated with Organizations



Custom Field Library

Custom fields may already exist but for a different section.

Use the "[Custom Fields Library](#)" link at the bottom of the form to view fields already created.

If the field you want to use is here, click the "... " next to the field name and add it to the section. If not, continue with this article to add a new custom field.

[Custom Field Library](#) →

Custom Fields Library

Choose Field Type

Search by label

Additional phone



Shirt Size

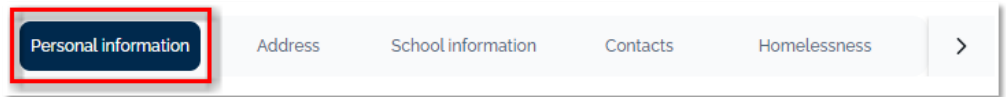


People

When creating custom fields for People, you can select the section of the profile where the custom field will show. There are only four options: Personal Information, Address, School Information, Contacts, and Homelessness.

Click on the section's name to create a custom field for it.

The first section displays the Default Fields under each category. These fields will appear for all participants in this profile category and are not editable.



Default Fields

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Middle Name	Date of Birth
<input type="text"/>	<input type="text"/>
Participant ID *	State Participant ID
<input type="text"/>	<input type="text"/>
Hispanic/Latino	Race
<input type="text"/>	<input type="text"/>
Gender	
<input type="text"/>	

Custom Fields already in use are displayed in the second section.

To edit an existing custom field, click the gear button to the right of the custom field name.

Custom Fields

Pant Size	<input type="text"/>	
Shirt Size	<input type="text"/>	

To create a new custom field, click on the custom fields type to the right.

To learn more about the custom fields available, [read this article](#).

Add custom field

Single Line Text

Multi Line Text

Integer

Percent

Decimal

Currency

Fill out the required information for the custom field type selected.

Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.

Single Line Text

Label *

Shoe Size

Max characters

10

For all custom fields, you want to determine if it is required.

You can also limit access to:

Read & Write: Users can edit the value as needed, regardless of role.

User Role Based: Define each of the above permissions by role.

Click **"Done"** at the bottom of the form to close it.

Required Field

Permissions



Read & Write

Done

Read & Write

User Role Based

To complete the process and add the custom field to the Custom Field Library, click **"Save changes"** at the top of the screen.

Participants

Custom Field Library →

Save Custom Fields

Staff

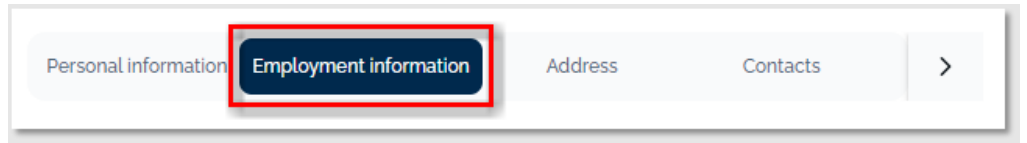
When creating custom fields for Staff, you can select the section of the staff record where the custom field will show. There are only four options: Personal Information, Employment Information, Address, and Contacts.

Click on the section's name to create a custom field for it.

The first section displays the Default Fields under each category. These fields will appear for all staff in this record category and are not editable.

Custom Fields already in use are displayed in the second section.





To edit an existing custom field, click the gear button to the right of the custom field name.







Default Fields

Employment information *

Site *

Staff Type   Compensation Type  

Funder *  

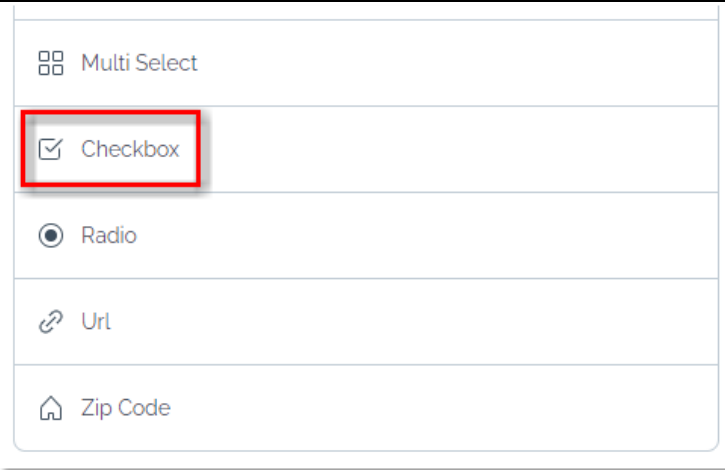
Employment start date *  Employment end date 

Custom Fields

Additional Languages Spoken 

To create a new custom field, click on the custom fields type to the right.

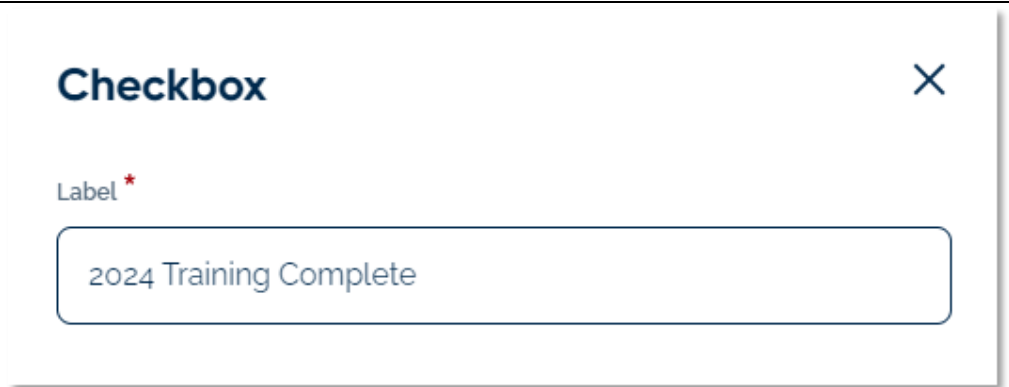
To learn more about the custom fields available, [read this article](#).



A vertical menu of custom field types. The 'Checkbox' option is highlighted with a red box. The other options are Multi Select, Radio, Url, and Zip Code.

Fill out the required information for the custom field type selected.

Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.



The 'Checkbox' configuration form. It has a title 'Checkbox' and a close button 'X'. A required field 'Label *' contains the text '2024 Training Complete'.

For all custom fields, you want to determine if it is required.

You can also limit access to:

Read & Write: Users can edit the value as needed, regardless of role.

User Role Based: Define each of the above permissions by role.

Click "**Done**" at the bottom of the form to close it.

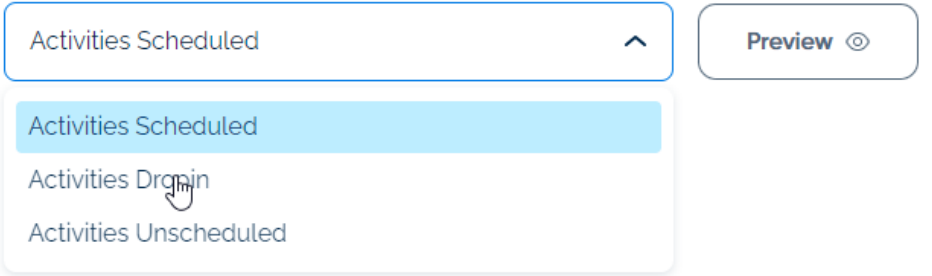
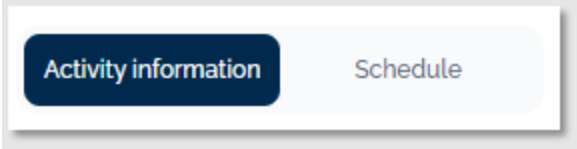
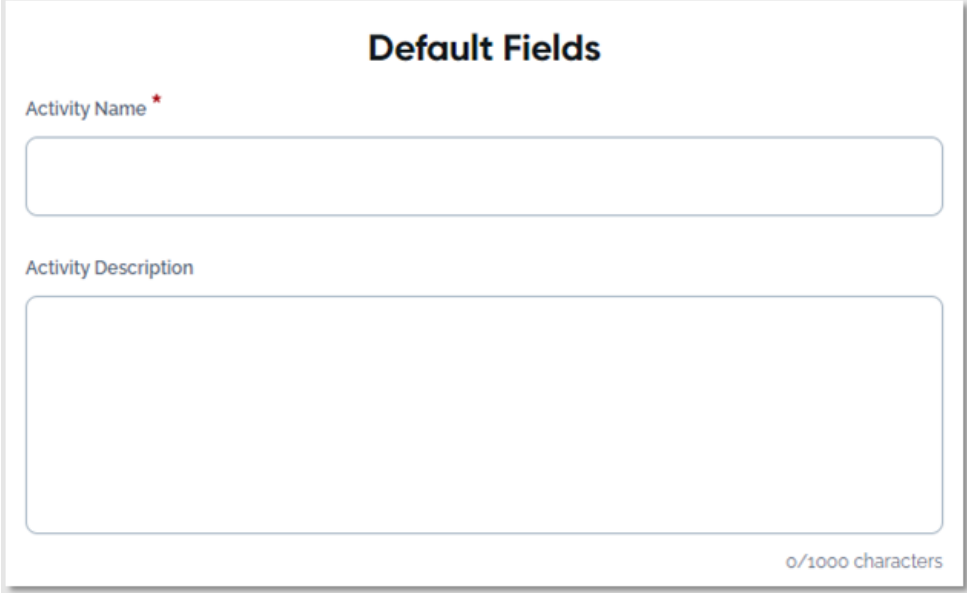

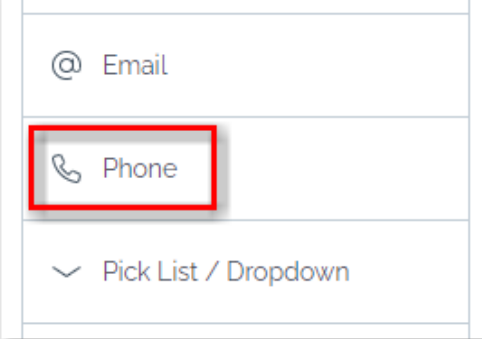


The permissions configuration form. It has a title 'Staff' and a close button 'X'. There are two sections: 'Required Field' with a green toggle switch, and 'Permissions' with a dropdown menu set to 'Read & Write'. A red box highlights the 'Read & Write' dropdown and the 'Done' button. A red arrow points from the dropdown to a preview box showing 'Read & Write User Role Based'.

To complete the process and add the custom field to the Custom Field Library, click "**Save changes**" at the top of the screen.

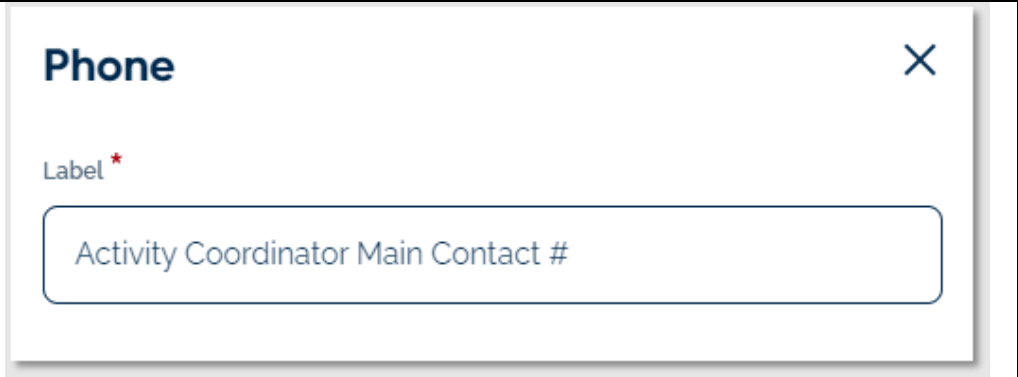


The bottom of the configuration form. It has a title 'Staff' and a close button 'X'. There are two buttons: 'Custom Field Library ->' and 'Save Custom Fields'.

<p>Activities</p> <p>When creating custom fields for activities, use the drop-down menu to select whether the custom field applies to scheduled, drop-in, or unscheduled activities.</p>	
<p>Custom fields can be set for the activity or the schedule form.</p> <p><i>If creating a custom field for unscheduled activities, the schedule form is not an option.</i></p>	
<p>The first section displays the Default Fields under each category. These fields will appear for all participants in this profile category and are not editable.</p>	
<p>Custom Fields already in use are displayed in the second section.</p> <p>To edit an existing custom field, click the gear button to the right of the custom field name.</p>	
<p>To create a new custom field, click on the custom fields type to the right.</p> <p>To learn more about the custom fields available, read this article.</p>	

Fill out the required information for the custom field type selected.

Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.



For all custom fields, you want to determine if it is required.

You can also limit access to:

Read & Write: Users can edit the value as needed, regardless of role.

User Role Based: Define each of the above permissions by role.

Click **“Done”** at the bottom of the form. To close the form.



To complete the process and add the custom field to the Custom Field Library, click **“Save Custom Fields”** at the top of the screen.



Organizations

When creating custom fields for organizations, use the drop-down menu to select the organization level.

Organizations

Organizations Top



Preview

Organizations Top

Organizations Institution Group

Organizations Institution

Organizations Partner

Organizations Funder

Organizations Site Group

The first section displays the Default Fields under each category. These fields will appear for all participants in this profile category and are not editable.

Default Fields

Organization Name *

Address

City

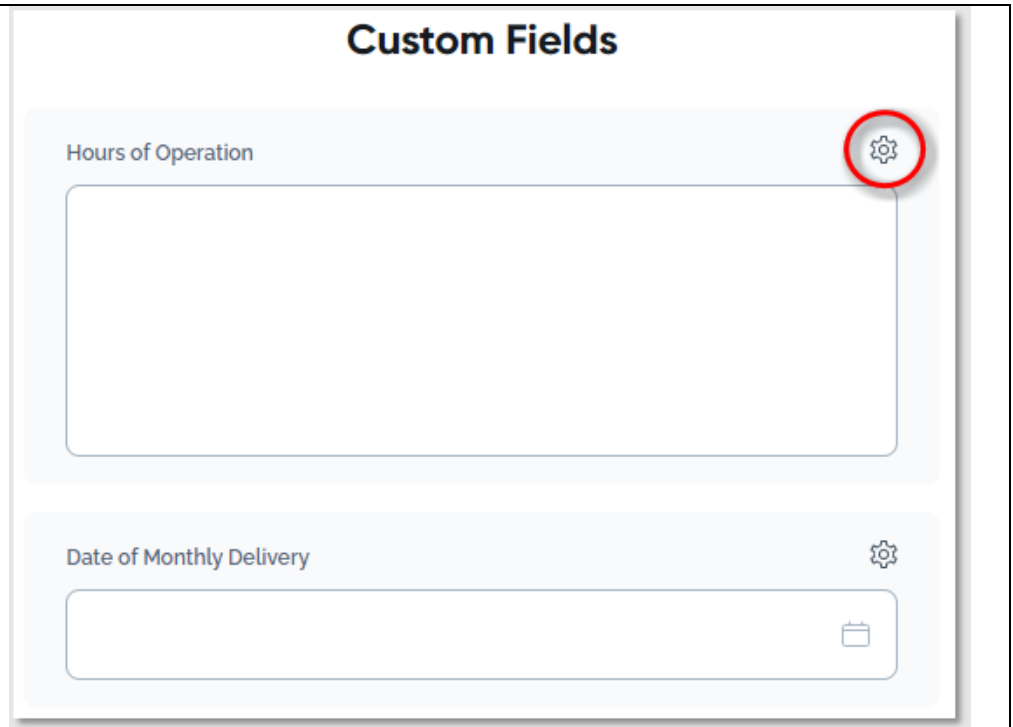
State

Zip Code

Time Zone *

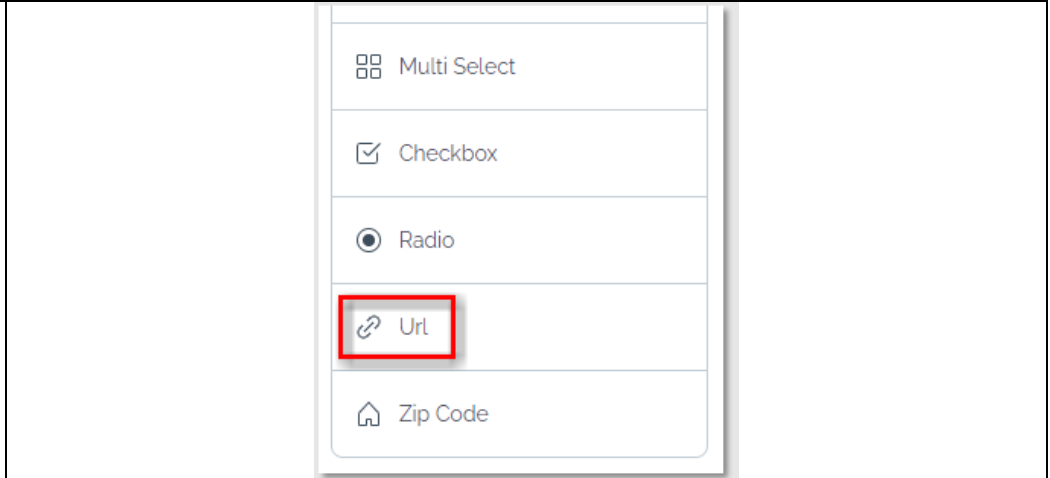
Custom Fields already in use are displayed in the second section.

To edit an existing custom field, click the gear button to the right of the custom field name.



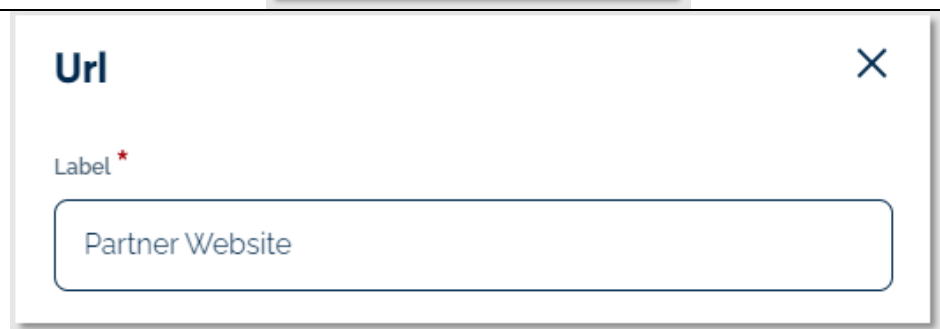
To create a new custom field, click on the custom fields type to the right.

To learn more about the custom fields available, [read this article](#).



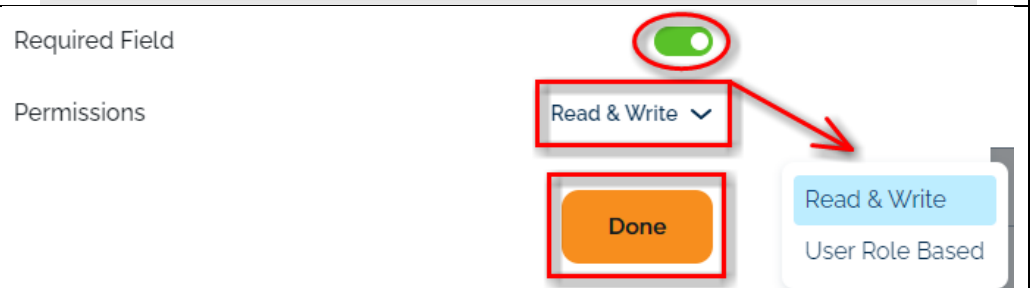
Fill out the required information for the custom field type selected.

Anything marked with a red asterisk is required. The custom field can only be saved once all required fields have content.



For all custom fields, you want to determine if it is required.

You can also limit access to:



Read & Write: Users can edit the value as needed, regardless of role.

User Role Based: Define each of the above permissions by role.

Click **"Done"** at the bottom of the form. To close the form.

To complete the process and add the custom field to the Custom Field Library, click **"Save Changes"** at the top of the screen.

Organizations

Custom Field Library →

Save Custom Fields