

Customization Guidelines for TDM CA v.2.5 dropdown menus (and other option lists)

Customization beyond modifications recommended as ‘Yes’ or ‘Maybe’ below may limit or prevent UCB from assisting with database troubleshooting and/or links to CWS/CMS data. Use Customization Log to keep track of all customization to your county’s TDM CA database. Keeping a good record of customization will allow for easier debugging if problems should arise later or when upgrading the database.

Menu	Source Table	Customization Method	Level of Difficulty	UCB Recommendation (Yes / No / Maybe)	Notes
Agency Info	tblAgencyInfo	Access ‘Agency Info’ form via ‘Customization Options’ form or double click on agency info on Main Menu.	Easy	Y	Modify to reflect agency information.
Facilitators	tblLUPFacilitator	Access ‘Facilitator’ / ‘Location’ form via ‘Customization Options’ form or click ‘Add’ button from ‘Meeting Information’ form*.	Easy	Y	Modify (and update) to reflect agency facilitators.
Locations	tblLUPLocation				Modify (and update) to reflect county locations.
Export Paths	tblLUPExpPath	Access export path form via ‘Add’ button from ‘Export Data’ form*.	Easy	Y	Modify to represent possible export paths in your user environment.
Attendee Type	tblLUPAttendee	Modify tblLUPAttendee from database window.	Moderate	M	Modify if need to count particular attendee type not included in current list (Details in Technical Guide). Quarterly report may need to be modified accordingly.
Location Types	tblLUPLocationType	Access ‘Location Type’ form via ‘Customization Options’ form*.	Easy	M	Modify if needed to include location types not included in current list. Quarterly report will need to be modified accordingly.

*Note when using forms to Edit a dropdown list, select a row, right click and choose ‘cut’ to delete a row.

Menu	Source Table	Customization Method	Level of Difficulty	Recommendation (Yes / No / Maybe)	Notes
Attendee Category (Modify the attendee category of a specific attendee type)	tblLUPAttendee	Modify tblLUPAttendee from database window. Specifically, modify the value of AttendeeCatID (with reference to tblLUPAttendeeCat).	Moderate	M	Modify only if there is compelling reason to regroup attendees. Quarterly report may need to be modified accordingly.
Attendee Category (Add, edit, or delete attendee categories)	tblLUPAttendeeCat	Modify tblLUPAttendeeCat from database window. Also modify tblLUPAttendee.AttendeeCatID accordingly.	Moderate	M	Modify only if there is compelling reason to alter attendee categories. Quarterly report will need to be modified accordingly.
Decision Lists - Imminent Risk of Placement - Emergency Placement - Placement Move - Exit from Placement	tblLUPImmRsk tblLUPEmrgPlc tblLUPPlcMv tblLUPExtPlc	Access decision list forms via 'Customization Options' form*.	Easy	M	Current options cover logical possibilities. Modify if there is compelling reason (e.g., need to match local terminology). Quarterly report will need to be modified accordingly.

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Menu	Source Table	Customization Method	Level of Difficulty	Recommendation (Yes / No / Maybe)	Notes
Export Types	tblLUPExpType	Modify tblLUPExpType from database window.	Moderate	N	Not recommended. Current values cover necessary options. In order to assist with link to CWS/CMS and outcome reporting, UCB needs export file in specified format. NOTE: some export behavior is governed by tblExportList.UCBRequired and VBA code in frmExportList class module and VBA module mdlExport. Modifying export-related behavior (e.g., to add additional export options) would be moderately difficult to difficult depending on familiarity with VBA.
Recommendations	tblLUPRecommendation	Access 'Recommendations' form via 'Customization Options' form*.	Easy	N	Not recommended. Current list matches CWS/CMS placement type options. In order to assist with link to CWS/CMS and outcome reporting, UCB requires values as distributed with database.
Removal Circumstances	tblLUPRemovalCirc	Access 'Removal Circumstances' form via 'Customization Options' form*.	Easy	N	Not recommended. Item specifically requested by AECF.
Primary Reason /Meeting Type	tblLUPRsnInvlv	Modify tblLUPRsnInvlv. Modify underlying table (tblMeetchild), form design of 'Add Child Information' form (frmMeetChild) and associated class module).	Difficult	N	Not recommended. If modified, quarterly report will require extensive modification. Queries and reports may also require modification. Modification will also represent substantial change to database organization and would be a non-supported customization.

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