Children’s Registry and Information System
Data Facilitator Manual

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About This Manual

The purpose of this manual is to instruct Children’s Registry and Information System (CHRIS) data facilitators in the use of the data facilitator tools provided in CHRIS. These tools were designed to assist data facilitators in maintaining a well-organized database environment.

For additional information on the CHRIS Project, refer to the User Manual, Reports Manual, and Field Reference Guide. All support documentation can be retrieved from the CHRIS website at www.chris.miami.edu.

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Legend

The following is a list of conventions used throughout this manual:

**Bold**  The titles of CHRIS screens and screen sections are presented in **bold-faced type**.

*Italics*  Field names, as well as references to tables, figures, and hands-on exercises, are presented in *italics*.

**UPPERCASE**  CHRIS buttons and main menu options are presented in **UPPERCASE** letters.

**Title Case**  CHRIS-related reports, functions, and lists (e.g., Duplicate Child Report, Child Record Locator, Code List) are presented in **Title Case**.

⚠️ **The IMPORTANT icon is used in the left margin to highlight information essential to the integrity and/or performance of CHRIS.**

📝 **The NOTE icon is used in the left margin to highlight information that deserves special attention.**
**Abbreviations**

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEESS</td>
<td>Bureau of Exceptional Education and Student Services</td>
</tr>
<tr>
<td>CHRIS</td>
<td>Children’s Registry and Information System</td>
</tr>
<tr>
<td>ESE</td>
<td>Exceptional Student Education</td>
</tr>
<tr>
<td>FDLRS</td>
<td>Florida Diagnostic and Learning Resources System</td>
</tr>
<tr>
<td>FDOE</td>
<td>Florida Department of Education</td>
</tr>
<tr>
<td>IDEA</td>
<td>Individuals with Disabilities Education Act</td>
</tr>
<tr>
<td>IEP</td>
<td>Individual Educational Plan</td>
</tr>
<tr>
<td>IFSP</td>
<td>Individualized Family Support Plan</td>
</tr>
</tbody>
</table>
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Data Facilitator Responsibilities

CHRIS data facilitators are the primary contacts for CHRIS users at the Florida Diagnostic and Learning Resources System (FDLRS) centers. They also serve as center liaisons to the CHRIS project. Data facilitators play a crucial role in maintaining an accurate database and, as such, are an extremely important part of the CHRIS project.

The data facilitators are expected to ensure data integrity, provide on-site support, upgrade hardware and software, coordinate training, create reports, and install the Citrix client. Detailed descriptions of these specific responsibilities of CHRIS data facilitators are provided below.

Data Integrity

Data facilitators are responsible for ensuring the integrity of the data contained in the CHRIS database. This is accomplished through data facilitator oversight of data security, data entry, and database management.

Data Security

User Access
The CHRIS database may only be accessed by authorized users. Data facilitators are responsible for assigning users to CHRIS and determining the proper access level for each user. The following levels of access are available in CHRIS:

1. Record Access
   • County Access – Access to the data of one or more counties
   • Site Access – Access to the data of all the counties in one site
   • Center Access – Access to the data of all the counties in one center

2. Record Edit Access
   • View only
   • View and edit
   • View, edit, and delete Service Coordination events and significant adults
Login Information
User profiles, including login information and access level, are created and maintained by the CHRIS Help Desk staff. All users must have their own username and password. No community logins are allowed. Users must keep their usernames and passwords secure. They should not be shared or posted on or near the computer.

Data facilitators are responsible for completing the appropriate form to notify the Help Desk if a user account needs to be added. The New User Data Form must be completed to add a user account and the Help Desk should be notified when users should be removed from the system via email. The New User Data Form is available on the CHRIS website at www.chris.miami.edu.

In order to maintain accurate user accounts, data facilitators should notify the Help Desk when a user leaves and, therefore, should no longer have access to CHRIS.

Data Entry Rules
The data facilitator should monitor the data entered into CHRIS to ensure that all data entry rules are being followed. Users should be educated on site-specific data entry rules and on the use of drop-down lists to maintain data consistency.

Data Formats
Extra care should be taken when entering data into name fields (e.g., First Name, Last Name). Names should always be entered with proper capitalization. Names will appear exactly as they were entered on all reports and mailings generated from CHRIS.

All dates should be entered using the following format:
• Use only four digit years
• Use only slashes (/) to separate the month, day, and year
• For example: 05/21/2019
Free Text Fields
Guidelines should be set by each center as to how information should be entered in free text fields. A good example of the importance of consistency in a free text field is the First Name field in the Significant Adults section of CHRIS. The names of one or both parents can be entered in this field. The data entered into the First Name field will dictate what should be entered in the Relation and Courtesy Title fields. These decisions should be made based on how the fields are used for reports and correspondence.

Drop-Down Lists
Drop-down lists help maintain data consistency. Many fields in CHRIS can be entered only by using drop-down lists. Statewide drop-down lists can only be modified by the CHRIS Help Desk and only after approval from the Technical Assistance Work Group (TAWG). Any requests for additions or changes to the statewide lists should be submitted to the CHRIS Help Desk or TAWG.

Site-defined drop-down lists can be modified by the data facilitator or other users approved by the data facilitator. An agreement should be made among the users at each center on how those fields will be used to maintain consistency in data entry. The data facilitator should educate new users on how to use these fields. For detailed instructions on how to add, update, or inactivate entries in site-defined drop-down lists, see the Manage Lists section of this manual.

Timeline Guidelines
All timeline data must be entered according to the Timeline Guidelines, which are available in the User Manual. The data facilitator should educate local users on any site-specific conventions for entering Timeline data.

Service Coordination Events
The use of the Service Coordination events must be consistent among users at each site. Data facilitators should inform users as to how these events are used for case management. It is crucial that guidelines be set and followed so that CHRIS can generate meaningful reports and be a useful case management tool.
Database Management

Duplicate Record Reduction
Duplicate records are problematic because they cause data entry and reporting errors, as well as result in inefficient case management. Every effort should be made to avoid the creation of duplicate records in the CHRIS database. Data facilitators should instruct all users to search for potential duplicates using the Record Locator screen prior to creating a new record (see Duplicate Records section p. 33).

Record Transfer
The Record Transfer program was created to prevent the duplication of records when a child moves to another county in Florida. Data facilitators should use this program to transfer records from one county to another once it has been verified that the child moved. Only data facilitators should request that a child’s record be transferred to another county within CHRIS.

On-Site Support
Data facilitators serve as the users’ primary contact for program-related issues and should provide basic assistance to local users. If the data facilitator is not available, users should contact the Help Desk for assistance. Data facilitators should contact the Help Desk directly for assistance with complex issues or to report any issues with the CHRIS program.

Data facilitators may be asked by the Help Desk to contact their local Information Technology (IT) Department for further assistance with network and Internet connectivity issues.
Training

Data facilitators are responsible for scheduling appropriate trainings for themselves and other CHRIS users. Data facilitators should also distribute project updates and information to all local CHRIS users.

**NOTE**

*Contact the Help Desk to schedule a training session.*

Reports

All users can generate reports in CHRIS. The **Reports** screen (see Figure 1) contains a list of reports that have been configured to generate results automatically according to site-specific requests. Additional assistance may be required from data facilitators to help users identify the correct find request and report option to produce the desired results. In addition, custom reports can be created by the Help Desk and then made available to all users. Additional information on reports frequently used by data facilitators can be found in the Reports section of this manual. For detailed instructions on creating reports, see the *Reports Manual.*
Data Facilitator Tools

The primary tool that data facilitators must become familiar with is Manage Lists. From the MANAGE LISTS option in the Main Menu, data facilitators can customize site-defined lists. The button for the MANAGE LISTS tool is only visible and accessible to data facilitators. A detailed description of the data facilitator tool available in CHRIS is provided in the pages that follow.

Manage Lists

The Manage Lists option is located in the CHRIS Main Menu (see Figure 1).

FIGURE 1

Reporting Screen

Available Reports

- Search reports
- 60 Day Rule Report
- Days Elapsed between Screening and Parent Consent
- FDLI Roach Reports
- SOD Completed Screening Report
- SOD Referral for Evaluation Report
- SOD Referral Report
- Standard Reports
Selecting the MANAGE LISTS option from the Main Menu will display the Manage Lists screen (see Figure 2). This screen displays the options that allow data facilitators to access site-defined lists.

**Figure 2  Manage Lists**

Site-Defined Lists

Many of the drop-down lists in CHRIS contain information that can be customized for each site. Data facilitators can modify these site-defined lists so that the drop-down lists reflect information pertinent to each individual FDLRS site. A description of each of the lists available in CHRIS is provided in Table 1.
### Table 1: Site-Defined Lists

<table>
<thead>
<tr>
<th>List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Type List</td>
<td>The Appointment Type List contains descriptions that can be assigned to each single appointment within the Appointment Event.</td>
</tr>
<tr>
<td>Cities List</td>
<td>The Cities List contains a list of local cities. This list is used as a locator for the adult and the child referenced. It can be used for mailing or for case management visitation.</td>
</tr>
<tr>
<td>Code List</td>
<td>The Code List is locally defined. Users should agree on how this field will be used. This information can be used for reporting or sorting records.</td>
</tr>
<tr>
<td>Contact Log List</td>
<td>The Contact Log List contains reasons for tracking a Contact Log event.</td>
</tr>
<tr>
<td>History Type List</td>
<td>The History Type List contains the service types the child may have received prior to being referred to FDLRS.</td>
</tr>
<tr>
<td>Home Zone School List</td>
<td>The Home Zone School List represents the location at which the child is receiving services. It may be the home or the name of an agency, school, childcare provider, or any other location where the child is receiving services. This list is used to generate reports for Service Coordination and program planning.</td>
</tr>
<tr>
<td>Language List</td>
<td>The Language List contains the most common languages used in the site’s area. It is used to identify languages the child and their significant adults use to communicate. This may or may not be the primary language used to communicate in the home. Because it is necessary to conduct screenings and evaluations in the primary language of the child, all options should be available in the list.</td>
</tr>
<tr>
<td>Location List</td>
<td>The Location List contains the location of an appointment or screening. This information is used for Service Coordination and is helpful in arranging schedules and transportation. It can also be used as a reference when communicating with service providers or for providing directions to parents.</td>
</tr>
<tr>
<td>On Hold List</td>
<td>The On Hold List contains reasons describing why a child’s record is on hold.</td>
</tr>
<tr>
<td>Providers &amp; Contacts List</td>
<td>Providers are organizations that provide services that are regulated by FDLRS and the Florida Department of Education (FDOE). Contacts are employees within a provider organization who facilitate supplying a care service. Contact the Help Desk to modify providers and contacts.</td>
</tr>
</tbody>
</table>

*To add or modify a provider or contact in CHRIS, contact the CHRIS Help Desk.*
Sub Location List
The Sub Location List is locally defined. Users should agree on how this field will be used. Some options are: school number, area or region of service, school or service location name, or other location. This field is only useful if local parameters have been defined for its use. It may be used to generate reports or identify service needs.

Site-Defined List Management
Management of the site-defined lists is identical for all lists. Therefore, as an example, management functions will first be described using the Cities List (see Figure 3). A detailed description of Providers & Contacts is provided beginning on page 13.

**Figure 3** Cities List Screen

<table>
<thead>
<tr>
<th>Sub Location</th>
<th>Value</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Location List</td>
<td>Fort Lauderdale</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Hallandale</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Hallandale Beach</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Hillsboro Beach</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Hollywood</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Homestead</td>
<td>Inactive</td>
</tr>
<tr>
<td></td>
<td>Lauderdale Lakes</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Lauderdale-by-the-Sea</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Loxahatchee</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Lighthouse Point</td>
<td>Active</td>
</tr>
</tbody>
</table>
Add a City
To add a city to the Cities List, complete the following steps:

Step 1. Select the MANAGE LISTS option from the main menu. The Manage Lists screen will be displayed (see Figure 2).

Step 2. Select the “Available Lists” Drop-Down option. All modifiable lists will be displayed (see Figure 2).

Step 3. Select the CITIES LIST option. The Cities List screen will be displayed (see Figure 3).

Step 4. The “New Option Value” field will be available at the top left of the screen to enter a city (see Figure 4).

**Figure 4** Cities List Screen
Step 5. Type the full name of the city to be added in the space provided. The Add Option button will turn blue.

Step 6. Select the Add Option button and the city will be added to the list in alphabetical order.

*NOTE* All new cities added to the Cities List will by default be “Active”. To remove a city from the list, find it and click the Active button to the right. This will change the button to Inactive and turn the button red (see Figure 5).

**FIGURE 5** Inactive City

<table>
<thead>
<tr>
<th>City</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miami Gardens</td>
<td>Active</td>
</tr>
<tr>
<td>Miramar</td>
<td>Active</td>
</tr>
<tr>
<td>New City</td>
<td>Inactive</td>
</tr>
<tr>
<td>North Lauderdale</td>
<td>Active</td>
</tr>
</tbody>
</table>
Exercise 1: Modify a list using Manage Lists

1. Select the Manage Lists option from the main menu.
2. Select the Available Lists Drop-Down.
3. Select the LANGUAGE LIST option.
4. Enter Portuguese into the New Option Value field.
5. Click Add Option.
6. Select the RECORD LOCATOR option from the main menu to return to the Record Locator screen.
Providers & Contacts

Providers are organizations that provide services to the child or provide services to the family that impact the child (e.g., Aid to Families with Dependent Children, Medicaid, Food Stamps, Social Security Income, Civilian Health And Medical Program of the Uniformed Services). Tracking the services the child receives can be used to support Service Coordination and reduce duplication of services.

Contacts are employees within a provider organization.

Fields where the Provider drop-down list is used in CHRIS:

1. Agencies/Providers (see Figure 6)
2. PRVD (see Figure 7)
3. Service Location (see Figure 8)
4. Referral Source in Referral First (see Figure 9)
5. Referral Source in Referral In (see Figure 10)
6. Referred To (see Figure 11)

Fields where the Contact drop-down list is used in CHRIS:

1. Staff Assigned (see Figure 6)
2. ISC or Service Coordinator (see Figure 6)
3. Referred By in Referral First (see Figure 9)
4. Referred By in Referral In (see Figure 10)
5. Who is Responsible (see Figure 11)
6. Diagnostician (see Figure 12)
7. Provider/Staff (see Figure 13)

Add a New Provider or Contact

To add or modify a provider or contact in CHRIS, contact the CHRIS Help Desk.
FIGURE 6  General Tracking Screen

DBNUM: 521827  Child ID: 521827.68  DOB: 08/08/2018  Age: 3.03
Last Name: Oui  Suffix:  First Name: Sebastian
SYS: 2023  This child is currently: 3 years 3 months and 7 days

Record Creator  Update Date  3rd Birthday
jnipper  11/05/2021  08/03/2021

Primary Language  County of Residence  Location
English  Pasco  DPESS

Sub Location  Staff Assigned  ISC or Service Coordinator
2-N0  Hicks, MaryJo  Brodhead, Gabriella

Code
Closed drawer

Prox Funding Programs
Program 1  Program 2  Program 3
Part C - Early Steps  -- Select --  -- Select --

Agency/Providers
Agency / Provider 1  Agency / Provider 2  Agency / Provider 3
PKAT  -- Select --  -- Select --
### Figure 7 Screening Detail

<table>
<thead>
<tr>
<th>Screening</th>
<th>P/F</th>
<th>Date</th>
<th>PRVD</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptive</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Behavior</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Cognition</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Development</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Hearing</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Language</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Motor</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Observation</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Parent Cont/Rprt</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Prof. Report</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Record Review</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Social/Emotional</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Speech</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Vision</td>
<td>Sr</td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
<td>-- Select --</td>
</tr>
</tbody>
</table>
### Figure 8: IEP/IFSP Detail

<table>
<thead>
<tr>
<th>IEP/IFSP Date</th>
<th>Parent Consent for Placement Date</th>
<th>Service Initiation Date</th>
<th>Educational Env. Date</th>
<th>Service Location</th>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PKAT</td>
<td>-- Select --</td>
</tr>
</tbody>
</table>

### Figure 9: Referral First Contact Detail

- **First Contact With FDLRS Date:** 08/24/2021
- **Referred By:** Private Elementary School
- **Referral Source:** EARLY STEPS PASCO
- **Phone:** 727-787-5428
- **Fax:** 813-040-7535

### Figure 10: Referral In Contact Detail

- **Referral In Date:** 07/02/2021
- **Referred By:** Collins, Lori
- **Referral Source:** PKAT
- **Phone:** 813-794-2630
- **Fax:** 813-794-2120
**Figure 11**  Referral Out Detail

Referred To: Toam AMP

Who is Responsible: Doctor

**Figure 12**  Evaluation Detail

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Comp Date</th>
<th>RR*</th>
<th>Report Rcvd</th>
<th>Diagnosticians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptive</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Audiological</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Behave Observ</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Communicatio</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Developmenta</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Educational</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Emotional/Beh</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Function Vision</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Intellectual</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Language</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Medical</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Motor</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Soc Dev Hst</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Speech</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Vision</td>
<td>MM/DD/YYYY</td>
<td></td>
<td>MM/DD/YYYY</td>
<td>-- Select --</td>
</tr>
</tbody>
</table>
Figure 13  Appointment Detail

- Appointment Date: 09/03/2021
- Time: 12:30 PM
- End Time: 12:30 PM
- Status: -- Select --
- Directions: -- Select --
- Location: -- Select --
- Provider/Staff:
  - -- Select --
  - -- Select --
  - -- Select --
  - -- Select --
  - -- Select --
- Appointment Type:
  - -- Select --
  - -- Select --
  - -- Select --
  - -- Select --
  - -- Select --
- Transport: -- Select --
Record Transfer
When children move from one county to another, data facilitators have the ability to grant record access to another county (upon request). Record access is granted based on the Residence County field. Users in the county specified in the Residence County field have full access (view and edit) to records. Users in the county specified in the Service County field (if different from the Residence County) have “view-only” access to records. The record transfer process, as described below in detail (see Figure 14), enables the sharing of data between FDLRS sites and eventually facilitates the complete transfer of data to the FDLRS center in the new Residence County of the child.

Child moves from Miami (FLDRS/South) to Ft. Lauderdale (FDLRS/Reach)

**Figure 14**

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>• FDLRS/Reach contacts FDLRS/South in Miami to verify that the child has moved.</td>
<td>• FDLRS/South changes the child’s Service County from Miami-Dade to Broward.</td>
<td>• FDLRS/South completes all data entry for the child.</td>
<td>• FDLRS/South changes the child’s Residence County from Miami-Dade to Broward.</td>
</tr>
</tbody>
</table>

**Result 1**
Record Transfer Process can be initiated.

**Result 2**
FLDRS/South retains full access (view and edit) to the record so that any remaining data entry can be completed. FDLRS/Reach obtains limited access (view only) to the record so that the child’s history can be reviewed and the appropriate services provided.

**Result 3**
FLDRS/South no longer needs access to the record and can officially “release” the record to FDLRS/Reach.

**Result 4**
The record is officially “released.” FDLRS/Reach has full access (view and edit) to the record. FDLRS/South can no longer access the record.

CHRIS Help Desk: (800) 231-5747
Service County

Changing the Service County will give view-only access to the users in the county listed. Full privileges (view and edit) are limited to users in the child's Residence County. To change the Service County in a child's record, complete the following steps:

Step 1. Find the child to be transferred using the Record Locator screen and select either their Tracking or Demographics screen. The TRANSFER option is displayed in the screen's menu (see Figure 15).

Transfer Button

![Figure 15](image)

Step 2. Select the TRANSFER option from the menu (see Figure 15).
Step 3. The **Record Transfer Request** screen will be displayed (see Figure 16).

**Figure 16**

![Record Transfer Request](image)

**Record Transfer Request**

Changing the County Of Residence to one not in your service area will move the child’s record to that county’s database and you will no longer have access to edit the record.

- [ ] Check here when you have read the above reminder

**Transfer Type:**

- [ ] Select

**Transfer To County:**

- [ ] Select

Step 4. Select “ServiceCounty” from the Transfer Type drop-down list (see Figure 17).

**Figure 17**

![Transfer Type drop-down](image)

**Record Transfer Request**

Changing the County Of Residence to one not in your service area will move the child’s record to that county’s database and you will no longer have access to edit the record.

- [ ] Check here when you have read the above reminder

**Transfer Type:**

- Select

- Residence County

- ServiceCounty

**Transfer To County:**

- Select

- [ ] Transfer Child

CHRIS Help Desk: (800) 231-5747
Step 5. Select a County name from the Transfer To County drop-down list (see Figure 18).

**Residence County drop-down**

**Figure 18**

Record Transfer Request

Changing the County Of Residence to one not in your service area will move the child’s record to that county’s database and you will no longer have access to edit the record.

☐ Check here when you have read the above reminder

**Figure 19**

Record Transfer Warning Service County

Step 6. After completing steps 4 & 5, the “Check here when you have read the above reminder” warning turns red. Checking the related box is required to continue with the transfer process (see Figure 19).

Step 7. Verify that this is the correct child’s record to be transferred and check the warning box.
Options
• CANCEL – Cancels the Record Transfer and returns to the Demographics or Tracking screen.
• TRANSFER CHILD – Transfers the child’s record to the indicated Service or Residence County.

Step 8. Select the TRANSFER CHILD option to complete the Service County record transfer and return to the Record Locator screen.

Residence County
Changing the Residence County will complete the transfer of the child’s record to another county. Only the users in the child’s Residence County will be able to edit that record. To change the Residence County, complete the following steps:

Step 1. Select the same child using the Record Locator screen. The TRANSFER option is displayed in the menu of the Tracking and Demographics screens (see Figure 15).

Step 2. Select the TRANSFER option from the menu.

Step 3. The Record Transfer Request screen will be displayed (see Figure 16).

Step 4. Select “Residence County” from the Transfer Type drop-down list (see Figure 17).

Step 5. Select a County name from the Transfer To County drop-down list (see Figure 18).
Step 6. After completing steps 4 & 5, the “Check here when you have read the above reminder” warning turns red. Checking the related box is required to continue with the transfer process (see Figure 20).

Step 7. Verify that this is the correct child’s record to be transferred and check the warning box.

**Options**
- CANCEL – Cancels the Record Transfer and returns to the Demographics or Tracking screen.
- TRANSFER CHILD – Transfers the child’s record to the indicated Service or Residence County.

Step 8. Select the TRANSFER CHILD option to complete the Residence County record transfer and return to the Record Locator screen.
Reports

The REPORTS option is used to generate reports. The data facilitator should be familiar with report options such as: Tracking, Timeline, Action Needed, Site, Providers & Contacts, and Mass Screening reports (see Figure 21). Data facilitators should provide users with on-site support for report generation.

**Figure 21**

![Reporting Screen](image_url)

Available Reports

- 90 Day Rule Report
- Days Elapsed between Screening and Parent Consent
- FDLRS Reach Reports
- SOD Completed Screening Report
- SOD Referral for Evaluation Report
- SOD Referral Report
- Standard Reports
Site Reports

The Site Reports provide a summary of FDLRS Child Find activities by month and year for the three previous school years. Reports can be generated by center, county, or site.

Two types of reports can be generated: Workload and Unduplicated. The Workload Report is based on a set of seven events and counts the total number of those events. The Unduplicated Report is based on six events and counts the total number of children served. For instance, if a child has two Screening events, the child would count only once in the Unduplicated Report, but both Screening events would be counted in the Workload Report.

Due to the complexity of these reports, only the CHRIS Help Desk can generate Site Reports. The data facilitator is responsible for contacting the Help Desk to request a Site Report.
The Workload Site Report is based on a set of seven events. This includes the total number of Referral First Contact with FDLRS (First Contact with FDLRS Date), Referral In (Referral In Date), Transition (Part C to Part B Transition Notification Date), Screening (Screening Final Result Date), Evaluation (Final Result Date), Exceptional Student Education Eligibility (ESE Eligibility Date), and Individual Educational Plan/Individualized Family Support Plan (IEP/IFSP Date) events for each school year (see Figure 22).

Find Criteria:
First Contact - First Contact with FDLRS Date
Referral In - Referral Date
Transition - Transition Notification Date
Screening - Date of Final Result
Evaluation - Completion Date
ESE Eligibility - ESE Eligibility Date
IEP/IFSP - IEP/IFSP Date

Figure 22 Workload Site Report

3 Year Comparative Center Report (Workload)

<table>
<thead>
<tr>
<th>Sum Of Count</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Year</td>
</tr>
<tr>
<td>First Contact</td>
<td>18/19</td>
</tr>
<tr>
<td>First Contact</td>
<td>19/20</td>
</tr>
<tr>
<td>First Contact</td>
<td>20/21</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Referral In</td>
<td>18/19</td>
</tr>
<tr>
<td>Referral In</td>
<td>19/20</td>
</tr>
<tr>
<td>Referral In</td>
<td>20/21</td>
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<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Transition</td>
<td>18/19</td>
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<td>Transition</td>
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<tr>
<td>Transition</td>
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<td>18/19</td>
</tr>
<tr>
<td>Screening</td>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Evaluation</td>
<td>18/19</td>
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</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
</tbody>
</table>

The Site report provides a summary of FDLRS Child Find activities by month and year for the three previous school years generated. The Workload Site report is based on a set of seven events, and the Unduplicated report is based on the total number of children served. For instance, if a child was screened twice, the child would count only once in the Unduplicated report, but both screen events would be counted in the Workload report.
Unduplicated Site Report

The Unduplicated Site Report is based on the number of children served and contains the total number of children who have a Referral First Contact with FDLRS (First Contact with FDLRS Date), Transition (Part C to Part B Transition Notification Date), Screening (Screening Final Result Date), Evaluation (Final Result Date), Exceptional Student Education Eligibility (ESE Eligibility Date), and Individual Educational Plan/Individualized Family Support Plan (IEP/IFSP Date) event for each school year (see Figure 23).

**Figure 23** Unduplicated Site Report

<table>
<thead>
<tr>
<th>Category</th>
<th>Year</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
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<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
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<td>First Contact</td>
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<td>419</td>
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<td>345</td>
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<td>407</td>
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<td>476</td>
<td>437</td>
<td>365</td>
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<td>229</td>
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</tr>
</tbody>
</table>

The report provides a summary of FDLRS Child Find activities by month and year for the three previous school years. Reports can be generated by center, county, or site. Two types of reports can be generated: Workload and Unduplicated. Workload report is based on a set of seven events, and the Unduplicated report is based on the total number of children served for the fiscal year. For instance, if a child was screened twice, the child would count only once in the Unduplicated report, but both screen events would be counted in the Workload report.

Find Criteria:
- First Contact - First Contact with FDLRS Date
- Referral In (Workload Only) - Referral In Date
- Transition - Transition Meeting Date or Part C to Part B Referral Date
- Screening - Date of Final Result
- Evaluation - Completion Date
- ESE Eligibility - ESE Eligibility Date
- IEP/IFSP - IEP/IFSP Date

Records Transferred In During School Year: 20/21 52
Records Transferred Out During School Year: 20/21 96

Data Facilitator Manual
Duplicate records are problematic because they cause data entry and reporting errors. If a duplicate record is found in the database, it should be marked for deletion. Data facilitators are responsible for marking duplicate records for deletion. Permanent deletion of records can only be done by the Help Desk.

**Marking Duplicate Records for Deletion**

To mark records that need to be deleted by the Help Desk, complete the following steps:

Step 1. Select the RECORD LOCATOR option from the main menu.

Step 2. Enter the search criteria in the appropriate fields to locate the record that needs to be marked for deletion.

Step 3. Select the GO option.

Step 4. Select the DEMO option next to the record to be marked for deletion. The child’s demographic information will be displayed.

Step 5. Delete the Last Name values. Enter “DUPLICATE” in the Last Name field.

It is also recommended that data facilitators print out a list of duplicate child records to be deleted and child records to be kept in the database. This report can be emailed to the Help Desk at chris.um@miami.edu for further review. In addition, data facilitators should compare the duplicate and the matching records to make sure all appropriate events are created in the child’s record that will be kept.