Children’s Registry and Information System
Data Facilitator Manual
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 http://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**.

![IMPORTANT](image)

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

![NOTE](image)

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

![WARNING](image)

**WARNING**  
The **WARNING** icon is used in the left margin to highlight information on how to avoid a potential problem or issue in CHRIS.

![HANDS-ON](image)

**HANDS-ON**  
The **HANDS-ON** icon is used in the left margin to indicate a hands-on exercise to be completed by the user.
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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

3. Field Level Access
   • Access to Medicaid number and Social Security number
**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 the computer.

Data facilitators are responsible for completing the appropriate form to notify the Help Desk if a user account needs to be added or removed. The *New User Data Form* must be completed to add a user account and an *Inactive User Data Form* must be completed to remove a user account. Both forms are available on the CHRIS website at [http://www.chris.miami.edu](http://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: 05/21/2015

Modification of field formatting, such as font type, font size, or font color, should be done only in report layouts. Formatting should not be modified on data entry screens.
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 the Child Demographic Information screen. 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 Definitions 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 Child Record Locator screen prior to creating a new record.

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 the data facilitator has the administrative access required to transfer the child’s record to another county within CHRIS. For detailed instructions on how to transfer a child’s record, see the Record Transfer section of this manual.

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.

Contact the Help Desk to schedule a training session.

Reports

All users can generate reports in CHRIS. The Reporting 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 the data facilitator to help users identify the correct find request and report option to produce the desired results. In addition, custom reports can be created using the Reporter program. Data facilitators and other trained users can create customized reports and make them 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 standard and custom reports, see the Reports Manual and Advanced Reports Manual.

Citrix

Citrix provides secure access to data via the Internet from a single centralized master database while maintaining local case management functionality. The implementation of sophisticated security measures ensures the confidentiality of children’s records throughout the CHRIS system.

The data facilitator is responsible for setting up, configuring, and maintaining the Citrix client program for each workstation. For detailed information on Citrix, see the Citrix section of the CHRIS website at http://www.chris.miami.edu.
Data Facilitator Tools

The two primary tools that data facilitators must become familiar with are the Definitions and Record Transfer tools. From the Definitions screen, data facilitators can customize site-defined lists as well as add and edit providers and contacts. From the Record Transfer screen, data facilitators can transfer records from one county to another. The buttons for the Definitions and Record Transfer tools are visible to all CHRIS users, but only data facilitators can access these screens. A detailed description of the data facilitator tools available in CHRIS is provided in the pages that follow.

Definitions

The DEFINITIONS option is located in the CHRIS Reporting screen (see Figure 1).

![Figure 1: Reporting Screen](image)
Selecting the DEFINITIONS option from the Reporting screen will display the Definitions screen (see Figure 2). This screen displays the options that allow data facilitators to access site-defined lists.

**Figure 2** Definitions Screen

![Definitions Screen](image)

**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.
### Site-Defined Lists Table

<table>
<thead>
<tr>
<th>List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 the primary language the child uses to communicate. This may or may not be the primary language the child uses 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. This screen allows each site to manage the providers and contacts appropriate for their site.</td>
</tr>
<tr>
<td>Sub Location List</td>
<td>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.</td>
</tr>
</tbody>
</table>
Site-Defined List Management
Management of the site-defined lists is identical for all lists with the exception of Providers & Contacts. Therefore, as an example, management functions will first be described using the Cities List (see Figure 3). The functions described apply to all other lists except Providers & Contacts. A detailed description of Providers & Contacts is provided beginning on page 14.

Figure 3 Cities List Screen
Add a City
To add a city to the Cities List, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The Definitions screen 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. Select the NEW option from the menu. The Cities List screen will now be displayed with a new field to enter a city (see Figure 4).

![Cities List Screen](image)
Step 5. Type the full name of the city to be added in the space provided. The city added will appear selected (e.g., an “X” will be displayed in the checkbox). Only cities that have been selected will be displayed in the corresponding drop-down list.

Step 6. Select the UPDATE LIST option from the menu and the city will be added to the list in alphabetical order.

To select a city, click within the checkbox next to the city name. Clicking within the checkbox will toggle between adding an “X” to the box and removing the “X” from the box. If there is an “X” present in the checkbox, the city will be included in the associated drop-down list. If there is no “X” present in the checkbox, the city will not be available for selection from the drop-down list. Any changes made to the records will not be completed until the UPDATE LIST option is selected.

**Edit a City**
To edit a city in the Cities List, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen 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. Select on the city name and modify the text.

Step 5. Select the UPDATE LIST option from the menu and the city will be added to the list in alphabetical order.
Hands-On Exercise 1: Modify a list in the Definitions screen

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the LANGUAGE LIST option.
4. Select the NEW option from the menu.
5. Enter the following text: Portuguese
6. Select the UPDATE LIST option.
7. Select on the language name that was just added and edit it to display the following text: Portuguese/Spanish
8. Select the UPDATE LIST option.
9. Select the EXIT option from the menu to return to the Definitions screen.
Providers & Contacts

Providers are organizations that provide a care service. This includes 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 who facilitate supplying a care service.

Add a New Provider
To add a new provider in CHRIS, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The Definitions screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The Care Providers Directory and Contacts Directory screen will be displayed (see Figure 5).

Figure 5

Care Providers Directory and Contacts Directory Screen
Step 4. Select the NEW option from the menu. The **Create New Provider** screen will be displayed (see Figure 6).

**Create New Provider Screen**

![Create New Provider Screen](image)

- **Provider Name**
- **Provider Phone**
- **Provider County**

**Enter the new Provider Name, Phone Number and County.**

**Click Continue to create the new Provider**

**or Cancel to exit without making a new Provider.**

Step 5. Fill in all the fields with the appropriate information.

Step 6. Select the CONTINUE option. The program will check for a duplicate provider name and phone number and then the **Care Providers Directory** screen will be displayed (see Figure 5).

Step 7. Enter any additional information needed for the provider.

   **Note:** Changes are immediately saved.

Step 8. Select the EXIT option from the menu.
Add a New Contact
To add a new contact in CHRIS, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The Definitions screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The Care Providers Directory and Contacts Directory screen will be displayed (see Figure 5).

Step 4. Select the FIND option from the menu.

Step 5. Enter the search criteria to locate the corresponding provider for the new contact you want to add.

Step 6. Press the Enter key on the number pad to perform the find.

Step 7. Enter the new contact information in the fields provided.
   Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.
Hands-On Exercise 2: Add a provider and contact

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the PROVIDERS & CONTACTS option.
4. Select the NEW option from the menu.
5. Enter the following information in the Care Providers Directory:
   - **Provider**: Miami Care Center
   - **Provider Phone**: (305) 284-5555
   - **Provider County**: Dade
6. Select the CONTINUE option.
7. Enter additional information:
   - **Provider Type**: A (Active)
8. Enter the following information in the Contacts Directory:
   - **Last Name**: Charles
   - **First Name**: Mary
   - **Phone Number**: (305) 284-5151
   - **Fax**: (305) 284-6991
   - **Email**: mcharles@mcc.org
   - **Status**: A (Active)
   - **Note**: Changes are immediately saved.
9. Select the FIND ALL option from the menu to view a full list of providers.
10. Select the LIST VIEW option to view all records.
11. Select the EXIT option to return to the **Reporting** screen.
**Edit a Provider or Contact**

To update a provider or contact in CHRIS, complete the following steps:

**Step 1.** Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

**Step 2.** Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

**Step 3.** Select the PROVIDERS & CONTACTS option. The **Care Providers Directory and Contacts Directory** screen will be displayed (see Figure 5).

**Step 4.** Select the FIND option from the main menu.

**Step 5.** Enter provider or contact information in the appropriate fields.

**Step 6.** Press the Enter key on the number pad to perform the find.

**Step 7.** Modify the provider or contact information as needed.
   Note: Changes are immediately saved.

**Step 8.** Select the EXIT option from the menu.

Select “A” from the **Provider Type** field drop-down list if the provider is active, and the provider name should appear in the drop-down lists in the **Tracking Summary** and **Event Detail** screens. Select “X” if the provider is inactive and should no longer appear in the drop-down lists. In the **Status** field, select “P” if the contact should only be displayed in the **Referred By** field in the Referral First Contact with FDLRS and Referral In events.
Inactivate a Provider or Contact
Provider and contact records that are deleted from CHRIS cannot be recovered or restored. Therefore, a child’s record that references a deleted provider or contact will not contain any information in those fields. Due to the severe consequences of data loss, CHRIS provides the option to flag old provider and contact names as inactive. Marking records as inactive will remove those providers and contacts from drop-down lists in the Tracking Summary and Event Detail screens, but inactive provider and contact information will continue to be stored in existing child records.

To inactivate a provider or contact, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The Definitions screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The Care Providers Directory and Contacts Directory screen will be displayed (see Figure 5).

Step 4. Select the FIND option from the main menu.

Step 5. Enter provider or contact information in the appropriate fields.

Step 6. Press the Enter key on the number pad to perform the find.

Step 7. Select “X” from the Provider Type drop-down list to inactivate the provider, or select “X” from the Status drop-down list to make the contact inactive. Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.
Hands-On Exercise 3: Inactivate a provider and update a contact

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the PROVIDERS & CONTACTS option.
4. Select the FIND option from the menu.
5. Enter the following information:
   - Provider Name: Miami Care Center
6. Press the Enter key on the keyboard to perform the find.
7. Edit the Provider Type and Contact Phone Number.
   - Provider Type: X (Inactive)
   - Phone Number: (305) 234-6868
   Note: Changes are immediately saved.
8. Select the EXIT option from the menu.
Record Transfer

When children move from one county to another, data facilitators have the ability to grant record access to other counties (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 7), 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.

**Figure 7** Child moves from Miami (FLDRS/South) to Ft. Lauderdale (FDLRS/Reach)

- **Step 1**
  - FDLRS/Reach contacts FDLRS/South in Miami to verify that the child has moved.

- **Step 2**
  - FDLRS/South changes the child’s Service County from Miami-Dade to Broward.

- **Step 3**
  - FDLRS/South completes all data entry for the child.

- **Step 4**
  - FDLRS/South changes the child’s Residence County from Miami-Dade to Broward.

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

**Result 2**
FDLRS/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**
FDLRS/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.
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. Select a child using the Child Record Locator screen. The RECORD TRANSFER option is displayed in the main menu of the Tracking Summary and Demographic screens (see Figure 8).

![Tracking Summary Screen](image)

The RECORD TRANSFER option is visible to all users, but only data facilitators can transfer a record.
Step 2. Select the RECORD TRANSFER option from the main menu. Data facilitators can either transfer the current record or search for a new record to transfer (see Figure 9).

**Figure 9  Record Transfer Options**

Step 3. For this example, search for a new record to transfer. Select the SEARCH option. The Record Transfer Find screen will be displayed (see Figure 10).

**Figure 10  Record Transfer Find Screen**
Step 4. Enter the search criteria in the appropriate fields to locate the child whose record needs to be transferred.

Step 5. Select the GO option.

Step 6. Select the TRANSFER option next to the child’s record. The Record Transfer Child Display screen will be displayed (see Figure 11).

**Figure 11** Record Transfer Child Display Screen

![Record Transfer Child Display Screen](image)

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

**Options**
- YES – Confirms that this is the correct child’s record to be transferred
- NO – Returns to the Child Demographic Information screen
Step 8. Select the YES option. The **Record Transfer Rules** screen will be displayed (see Figure 12).

**Figure 12  Record Transfer Rules Screen**

The screenshot shows a screen with options to change service or residence county, cancel the process, and options to give VIEW or EDIT access to another county.

**Options**
- **CHANGE SERVICE COUNTY** – Modifies the Service County field
- **CHANGE RESIDENCE COUNTY** – Modifies the Residence County field
- **CANCEL** – Abandons the record transfer process and returns to a blank Child Record Locator screen
Step 9. Select the CHANGE SERVICE COUNTY option. The **Record Transfer Service County Change** screen will be displayed (see Figure 13).

**Figure 13** Record Transfer Service County Change Screen

Options
- CHANGE SERVICE COUNTY—Modifies the Service County field in the **Child Demographic Information** screen
- CANCEL—Abandons the record transfer process and returns to a blank **Child Record Locator** screen

Step 10. Select a County name from the drop-down list.
Step 11. Select the CHANGE SERVICE COUNTY option. A message prompt will be displayed with the name of the new Service County for that record (see Figure 14).

Step 12. Select the OK option. The Service County for the child’s record has been changed.

**Figure 14**  
Service County Has Been Changed To Message

<table>
<thead>
<tr>
<th>County Of Residence Changed</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Of Residence Has Been Changed To Dade.</td>
</tr>
<tr>
<td>OK</td>
</tr>
</tbody>
</table>

**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 Child Record Locator screen. The RECORD TRANSFER option is displayed in the main menu of the Tracking Summary and Demographic screens (see Figure 8).

Step 2. Select the RECORD TRANSFER option from the main menu.

Step 3. For this example, use the record that was already selected. Select the CURRENT option. The Record Transfer Find screen will be displayed with the current record’s information (see Figure 10).

Step 4. Select the TRANSFER option next to the child’s record to be transferred. The Record Transfer Child Display screen will be displayed (see Figure 11).

Step 5. Verify that this is the correct child’s record to be transferred.

Step 6. Select the YES option. The Record Transfer Rules screen will be displayed (see Figure 12).
Step 7. Select the CHANGE RESIDENCE COUNTY option. The **Record Transfer Residence County Change** screen will be displayed (see Figure 15).

**Figure 15**

*Record Transfer Residence County Change Screen*

Options

- **CHANGE RESIDENCE COUNTY** – Modifies the *Residence County* field in the *Child Demographic Information* screen
- **CANCEL** – Abandons the record transfer process and returns to a blank *Child Record Locator* screen

Step 8. Select a County name from the drop-down list.

Step 9. Select the checkbox below to mark an “X.” (This checkbox is required to proceed.)
County of Residence Has Been Changed To Message

Figure 16

County Of Residence Changed
County Of Residence Has Been Changed To Dade.

OK

Step 10. Select the CHANGE RESIDENCE COUNTY option. A message prompt will be displayed with the name of the new Residence County for that record (see Figure 16).

Step 11. Select the OK option. The record has been transferred to the new Residence County selected.

Hands-On Exercise 4: Transfer a child’s record

1. Select the LOCATOR option from the main menu.
2. Enter the following information:
   - Last Name: Abs
   - First Name: Katie
3. Select the DEMO option to select the record.
4. Select the RECORD TRANSFER option from the main menu.
5. Select the CURRENT option.
6. Select the TRANSFER option.
7. Verify the child’s demographic information and select the YES option.
8. Select the CHANGE SERVICE COUNTY option.
9. Select Baker from the drop-down list.
10. Select the CHANGE SERVICE COUNTY option (see message).
11. Select the OK option.
   - Note: Baker county now can view (not edit) this child’s record.
12. Select the record again using the Child Record Locator screen.
13. Select the RECORD TRANSFER option from the main menu.
14. Select the CURRENT option.
15. Select the TRANSFER option.
16. Verify the child’s demographic information and select the YES option.
17. Select the CHANGE RESIDENCE COUNTY option.
18. Select Baker from the drop-down list and mark the checkbox.
19. Select the CHANGE RESIDENCE COUNTY option.
20. Select the checkbox below to mark an “X.”
21. Select the CHANGE RESIDENCE COUNTY option.
Reports

The REPORTS option is used to generate standard and customized reports. The data facilitator should be familiar with standard report options such as: Tracking, Timeline, Action Needed, Allsites, Providers & Contacts, and Mass Screening reports (see Figure 17). Data facilitators should provide users with on-site support for report generation.

![Figure 17 Reporting Screen](image)

**Reporter**

The Reporter program is used to generate customized reports in CHRIS. It provides the flexibility to create layouts or to modify existing layouts. In addition, Reporter allows the creation of FileMaker scripts that can be customized to facilitate performing finds, sorting, and printing.

Reporter has no permission restrictions and is available to all CHRIS users; however, the creation of reports should only be performed by trained personnel. A basic understanding of the CHRIS program and the FileMaker Pro application is required to design custom reports. Typically, the data facilitator regulates the usage, creation, and uniformity of site-specific reports.

The CHRIS Reports Manual and Advanced Reports Manual are available on the CHRIS website at [http://www.chris.miami.edu](http://www.chris.miami.edu). Users can also contact the CHRIS Help Desk to schedule a Reports Training session to learn more about using the CHRIS Reporter.
Allsites Report

The Allsites 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. 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 Allsites Reports. If a user selects the ALLSITES REPORT option from the Reporting screen, a message will be displayed indicating that this report must be run by the Help Desk (see Figure 18). The data facilitator is responsible for contacting the Help Desk to request an Allsites Report.

Figure 18  Allsites Report Message

![Allsites Report Message](image)
Workload Report

The Workload 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 Education Plan/Individual Family Service Plan (IEP/IFSP Date) events for each school year (see Figure 19).

**Figure 19**

**Allsites Workload Report**

**Center Comparative 3 Year Workload Report**

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Records Transferred In During School Year: 14/15 35
Records Transferred Out During School Year: 14/15 27
Unduplicated Report

The Unduplicated 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 Education Plan/Individual Family Service Plan (IEP/IFSP Date) event for each school year (see Figure 20).

### Figure 20

Allsites Unduplicated Report

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The Allsites 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 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: 14/15 35
Records Transferred Out During School Year: 14/15 27
Duplicate Records

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 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.