Children’s Registry and Information System
Reports Manual

Technical Support Information

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About This Manual

This manual was created to guide the usage of standard reports in the Children’s Registry and Information System (CHRIS) program. It includes instructions and step-by-step examples for creating standard reports.


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Legend

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

**Bold**  The titles of CHRIS Gold 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, event names, functions, and lists (e.g., Duplicate Child Report, Service Coordination, 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 Gold.**

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

The CHRIS software program contains a variety of standard reports to assist users in creating commonly used reports. In addition, CHRIS also contains a Reporter program that allows users to create custom reports. To access the reporting features in the CHRIS program, click the REPORTS button from the CHRIS main menu (see Figure 1).

**Figure 1** Child Record Locator Screen
Clicking the REPORTS button on the main menu will display the Reporting screen (see Figure 2). The Reporting screen displays all of the report options for the CHRIS program.

**FIGURE 2  Reporting Screen**

![Reporting Screen](image)

**Options**

The following reporting options are described in this manual:

- **STANDARD (TRACKING) REPORTS** – Contains standard reports
- **TIMELINE REPORTS** – Contains Timeline-specific reports
- **REPORTER (CUSTOM) REPORTS** – Allows for the creation of custom reports
- **ACTION NEEDED REPORT** – Contains Action Needed Reports for case management
- **SITE REPORTS** – Contains Site Reports that can be run by Center, Site, or County (These reports can only be run by the Help Desk.)
- **PROVIDERS & CONTACTS REPORT** – Contains data entry and directory reports for Providers & Contacts

*NOTE* Information on Mass Screening can be found in the User Manual. Information on managing Definitions can be found in the Data Facilitator Manual.
New Reports

- DAYS ELAPSED BETWEEN SCREENING AND PARENT CONSENT—Contains a report of days elapsed from Screening to Parent Consent for Evaluation. Includes average number of days and can be displayed graphically and/or in a list.

- 60-DAY RULE REPORT – Contains a report of days elapsed from Parent Consent for Evaluation to Evaluation Completion Date. Includes average number of days and can be displayed graphically and/or in a list.

- SOD REFERRAL REPORT– (Schedule of Deliverables Referral Report) Displays the number of Referral First Contacts or Referral Ins within a chosen date range. This report breaks down the results by individual county (if applicable).

- SOD COMPLETED SCREENINGS REPORT – Displays the number of completed screenings within a chosen date range. This report breaks down the results by individual county (if applicable).

- SOD REFERRAL FOR EVALUATION REPORT – Displays the number of evaluation referrals within a chosen date range. This report breaks down the results by individual county (if applicable).

- INTAKE/RELEASE FORM – Displays list of Intake and Release forms for user’s site (if applicable).
Reports Find Screen

Clicking either the STANDARD (TRACKING) REPORTS button or the REPORTER (CUSTOM) REPORTS button on the Reporting screen (see Figure 2) will display the Reports Find screen (see Figure 3). The Reports Find screen is used to select the data needed to create standard and custom reports for the CHRIS database.

FIGURE 3 Reports Find Screen

<table>
<thead>
<tr>
<th>Table</th>
<th>Event</th>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ServiceCoordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ActionNeeded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ServiceCoordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ActionNeeded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ServiceCoordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ActionNeeded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ServiceCoordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ActionNeeded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Each section of the **Reports Find** screen allows users to enter search criteria that will be used to find data related to the desired report (see Figure 4).

**FIGURE 4**  
**Reports Find Screen Section**

<table>
<thead>
<tr>
<th>Table</th>
<th>Event</th>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
</table>
| ○ Demo  
| ○ Timeline  
| ○ ServiceCoordination  
| ○ ActionNeeded  
| ○ Addresses | | | |

The *Table* field allows users to select the source of data needed. Select the table by clicking the circle to the left of the table name (see Figure 5).

**FIGURE 5**  
**Reports Find Screen Table Field**

- ○ Demo
- ○ Timeline
- ○ ServiceCoordination
- ○ ActionNeeded
- ○ Addresses

If demographic information is part of the find, Demo should be selected as the *Table* in the first section of the **Reports Find** screen.

If either Timeline or Service Coordination is selected as the table, the *Event* field will automatically display a list of the events pertaining to the table chosen (see Figure 6). The appropriate event should be selected from the drop-down list. If Demo, Action Needed, or Addresses is selected as the table, the *Event* field is bypassed.

**FIGURE 6**  
**Reports Find Screen Event Field**

- ○ Demo
- ○ Timeline
- ○ ServiceCoordination
- ○ ActionNeeded
- ○ Addresses

- EndTimeline
- ESEEglibility
- IEPFISP
- ReferralForEvaluation
- ReferralForScreening
- Transition
Once a table and an event (if necessary) are chosen, a list of fields unique to the selected table and event selected will automatically be displayed (see Figure 7). The appropriate field should be selected from the drop-down list.

![Figure 7](image)

The find criteria are entered into the *Value* field (see Figure 8). For example, a date range would be entered as 01/01/2019...03/31/2019.

![Figure 8](image)

To execute the find, click the PERFORM FIND button (see Figure 3). The CANCEL FIND button cancels the find and returns the user to the Reporting screen (see Figure 2).

![Figure 9](image)

The Reports Find screen (see Figure 3) contains the following options for performing complex finds (see Figure 9):

- **OR** – Includes records that meet the criteria from that section, regardless of the criteria specified in other sections.

- **OMIT** – Omits a set of records from the find results. The OMIT button should be used in the last section of the Reports Find screen.

When find criteria are entered in more than one section, the find functions as an “And” find (results will contain only those records that meet all the criteria specified in all the sections), unless the OR or OMIT option is selected.
After clicking the PERFORM FIND button on the **Reports Find** screen, the **Sorting** screen is displayed (see Figure 10). This screen provides options for sorting the data in the report. Click the button associated with the desired sort option.

**FIGURE 10  Sorting Screen**

<table>
<thead>
<tr>
<th>Sort By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Sort By Name</td>
</tr>
<tr>
<td>COR &amp; Date of Birth &amp; Name</td>
<td>Sort by COR &amp; Date of Birth &amp; Name</td>
</tr>
<tr>
<td>Date of Birth &amp; Name</td>
<td>Sort by Date of Birth &amp; Name</td>
</tr>
<tr>
<td>COR &amp; Screening Final Result</td>
<td>Sort by COR &amp; Screening Final Result</td>
</tr>
<tr>
<td>COR &amp; Age &amp; Timeline Status</td>
<td>Sort by COR &amp; Age &amp; Timeline Status</td>
</tr>
<tr>
<td>COR &amp; Age &amp; Service Coordination Status</td>
<td>Sort by COR &amp; Age &amp; Service Coordination Status</td>
</tr>
<tr>
<td>Date and Time For Appointments</td>
<td>Sort by Date and Time For Appointments</td>
</tr>
<tr>
<td>DBNUM</td>
<td>Sort by DBNUM</td>
</tr>
<tr>
<td>County of Residence</td>
<td>Sort by County of Residence</td>
</tr>
<tr>
<td>Create your own sort order</td>
<td>Create your own sort order</td>
</tr>
</tbody>
</table>

Total Number Found: 49

*NOTE*  On the Sorting screen, **COR** refers to County of Residence.

*NOTE*  The **GO TO REPORTS** button leaves the records unsorted and takes the user to the **Standard Reports** screen (see Figure 11).
Once the sort option is selected, the **Standard Reports** screen will be displayed (see Figure 11). This screen lists the standard report options available. Click the button to select the desired report.

**FIGURE 11 Standard Reports Screen**

<table>
<thead>
<tr>
<th>Standard Reports</th>
<th>9/22/2011</th>
<th>9/19/22 AM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral Report (First Contact &amp; In)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tracking Status of Referral for Screening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Count By Age Range (Year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Count By Age Range (Year/Month)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Schedule</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screening Appointment Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screening Schedule Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screening Results Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline Status Summary Data (Detailed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline Status Summary Data (Brief)(YrMnth)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline Status Summary Data (Brief)(Year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EIP Referral Follow-up Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master Timeline Reason/Close/Total Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Y/O Active Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ESE Staffing Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IEP/IFSP Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Timeline/Inactive Reason Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screening Labels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Labels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Needed Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presenting Problem Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inactive Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speech/Language Evaluation Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timelines Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children’s List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code Summary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Increase of Transitions(Indicator 12)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verification Activity for Indicator 12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE**

The **EXIT REPORTS** button returns the user to the Reporting screen (see Figure 2).
Performing Accurate Finds

Performing an accurate find is very important because the find provides the information on which reports will be based. Incorrect finds will produce inaccurate results. The following tips will assist users in performing accurate finds:

1. Know what specific data are required to create the desired report.

2. Be specific when performing finds. Given the number of records in the statewide database, it helps to be specific when performing finds. Enter date ranges, ID numbers, database numbers, or special terms to narrow the find criteria and return the data desired.

3. Limit the use of excessive search criteria. The Reports Find screen allows users to enter search criteria in up to six separate find sections. However, using numerous search criteria in a single report can cause inaccurate results. If you need to perform complicated finds to develop your report, contact the Help Desk for assistance.
Find Operators

Use the find operators below to improve the search criteria for records (see Table 1).

<table>
<thead>
<tr>
<th>To find values that:</th>
<th>Use this operator:</th>
<th>Example:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are less than the value of the item</td>
<td>&lt;</td>
<td>&lt;40 or &lt;09/09/1998</td>
</tr>
<tr>
<td>Are less than or equal to the value of the item</td>
<td>&lt;=</td>
<td>&lt;=50</td>
</tr>
<tr>
<td>Are greater than the value of the item</td>
<td>&gt;</td>
<td>&gt;10/10/1998</td>
</tr>
<tr>
<td>Are greater than or equal to the value of the item</td>
<td>&gt;=</td>
<td>&gt;=10</td>
</tr>
<tr>
<td>Have some or all of a field’s contents</td>
<td>=</td>
<td>=Ann (finds Ann or Ann Marie but not Annie)</td>
</tr>
<tr>
<td>Are an exact match of the field’s contents</td>
<td>==</td>
<td>==Anne (finds Anne but not Ann Marie or Annie)</td>
</tr>
<tr>
<td>Are within the range specified</td>
<td>...</td>
<td>12:30...17:30</td>
</tr>
<tr>
<td>Are duplicated values</td>
<td>!</td>
<td>!Ann (finds Ann or Annie or Annette)</td>
</tr>
<tr>
<td>Include today’s date</td>
<td>//</td>
<td>//</td>
</tr>
<tr>
<td>Have invalid dates or times</td>
<td>?</td>
<td>?</td>
</tr>
<tr>
<td>Have any one character</td>
<td>@</td>
<td>@</td>
</tr>
<tr>
<td>Have any one digit</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Have zero or more unknown or variable text characters</td>
<td>*</td>
<td><em>Anne</em> (finds Anne or Annette or Brianne)</td>
</tr>
<tr>
<td>Escape next character</td>
<td>\</td>
<td>\</td>
</tr>
<tr>
<td>Include literal text (including spaces and punctuation)</td>
<td>“”</td>
<td>“Jean-Louis”</td>
</tr>
<tr>
<td>in a field (text exactly as it appears, but regardless of uppercase or lowercase)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Match phrase from anywhere (not only word start)</td>
<td>*“”</td>
<td>“Louis”</td>
</tr>
<tr>
<td>Have empty fields</td>
<td>=</td>
<td>=</td>
</tr>
</tbody>
</table>
Standard Report Examples

Standard reports are pre-formatted reports that can be based on Demographic, Timeline, and/or Service Coordination data.

Demographic Reports

To run a Demographic Report, select the appropriate find criteria. In this example, only demographic data are selected (see Figure 12).

The following data are entered for the first section of the Reports Find screen:

Table: Demo
Event: (bypassed when Demo table is selected)
Field: DOB
Value: 01/15/2016...03/15/2016

In this example, the found set of records will include children born between January 15, 2016 and March 15, 2016.

After the find has been performed, select the sort option (see Figure 10) and then the report type (see Figure 11).
The demographic reporting options include the following:
- **CHILDREN’S LIST** – Generates a list of children’s records.
- **ADDRESS LABELS** – Generates address labels for the records selected.
- **CODE SUMMARY** – Generates a summary of the values contained in the Code Definitions List. Each Florida Diagnostic and Learning Resources System (FDLRS) site can use the Code field in whatever way is most beneficial to that site and the data facilitator can update this list.
- **Early Steps REFERRAL FOLLOW-UP REPORT** – Generates a follow-up report of Early Steps referrals.

*Demographic Reports can be created using finds based on any of the table options.*

*Complex Demographic Reports can be run with more than one find criteria. See the Complex Reports section of this manual.*

**Exercise 1: Running a Demographic Report**

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the DEMO option.
4. Select the **DOB** field from the drop-down list.
5. Enter the following information:
   
   **DOB: 6/2016**
6. Click the PERFORM FIND button.
7. Click the SORT BY NAME button.
8. Click the CHILDREN’S LIST button.
10. Select the EXIT REPORT option.
Basic Reports

To run a Basic Report using a single table, select a table, an event (if necessary), a field, and a value. In this example, the Referral In Service Coordination event is selected (see Figure 13).

The following data are entered for the first section of the Reports Find screen:

- **Table**: ServiceCoordination
- **Event**: ReferralIn
- **Field**: ReferralInDate
- **Value**: 1/2018...2/2018

![Reports Find Screen with Basic Find](image)

In this example, the found set of records will include children with a *Referral In Date* during the months of January and February 2018.

After the find has been performed, select the sort option (see Figure 10) and then the report type (see Figure 11).
Exercise 2: Running a Basic Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the SERVICE COORDINATION option.
4. Select Appointments from the event drop-down list.
5. Select ApptDate from the field drop-down list.
6. Enter the following information:
   Appt Date: 1/2018...3/2018
7. Click the PERFORM FIND button.
8. Click the SORT BY DATE AND TIME FOR APPOINTMENTS button.
9. Click the APPOINTMENT SCHEDULE button.
10. Scroll to the bottom to make a note of the number of records found.
11. Click the OMIT END TIMELINE button.
12. Click the OMIT REF INACTIVE button.
14. Select the EXIT REPORT option.
Complex Reports

Complex reports are based on multiple tables. The Reports Find screen allows users to enter search criteria in up to six separate find sections. In this example, both the Part C to Part B Transition (Timeline) and Referral First Contact with FDLRS (Service Coordination) events are selected (see Figure 14).

The following data are entered for the first section of the Reports Find screen:

- **Table**: Timeline
- **Event**: Transition
- **Field**: TrnTransitionMeetingDate
- **Value**: 1/2018

The following data are entered for the second section of the Reports Find screen:

- **Table**: ServiceCoordination
- **Event**: ReferralFirstContact
- **Field**: ReferralFirstContactDate
- **Value**: 1/2018

In this example, the found set of records will include children who had both a Transition Meeting Date and a Referral First Contact Date in January 2018.

After the find has been performed, select the sort option (see Figure 10) and then the report type (see Figure 11).

**NOTE**

If you choose to include demographic information, put it in the top section of the Reports Find screen.
Reports with an Or Find

The Or option is used to include records that meet the criteria from a section of the Reports Find screen regardless of the criteria specified in any other sections. In this example, a find is performed on the Referral First Contact with FDLRS event, and then that found set is expanded by adding records with a Referral In event (see Figure 15).

The following data are entered for the first section of the Reports Find screen:

- **Table**: ServiceCoordination
- **Event**: ReferralFirstContact
- **Field**: ReferralFirstContactDate
- **Value**: 6/2018

The following data are entered for the second section of the Reports Find screen:

- **Table**: ServiceCoordination
- **Event**: ReferralIn
- **Field**: ReferralInDate
- **Value**: 6/2018
- **Option**: Or

**FIGURE 15** Reports Find Screen with Or Find

In this example, the found set of records will include children who had either a Referral First Contact Date or a Referral In Date in June 2018.

After the find has been performed, select the sort option (see Figure 10) and then the report type (see Figure 11).
Reports with an Omit Request

The Omit option is used to exclude information from a find. In this example, a find is performed on demographic data, and then that found set is narrowed by eliminating any records that contain an open timeline (see Figure 16).

The following data are entered for the first section of the Reports Find screen:

- **Table:** Demo
- **Event:** (bypassed when Demo table is selected)
- **Field:** DOB
- **Value:** 1/2016

The following data are entered for the second section of the Reports Find screen:

- **Table:** Timeline
- **Event:** EndTimeline
- **Field:** EndDate
- **Value:** = (finds all records with an empty EndDate field)
- **Option:** Omit

In this example, the found set of records will contain data from the first section of the Reports Find screen and omit the data from the second section of the Reports Find screen. In this example, the find would result in a list of children born in January 2016 with a completed Timeline.

After the find has been performed, select the sort option (see Figure 10) and then the report type (see Figure 11).
Exercise 3: Running a Complex Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the TIMELINE option.
4. Select End Timeline from the event drop-down list.
5. Select End Date from the field drop-down list.
6. Type the following information:
   
   End Date: 1/2018

7. Click the SERVICE COORDINATION button in the next section.
8. Select Referral Inactive from the event drop-down list.
9. Select Referral Inactive Date from the field drop-down list.
10. Type the following information:
    
    Referral Inactive: 1/2018

11. Click the OR button.
12. Click the PERFORM FIND button.
13. Click the SORT BY NAME button.
14. Click the END TIMELINE/INACTIVE REASON REPORT button.
15. Select FILE from the FileMaker Menu.
16. Select the EXIT REPORT option.
**Action Needed Report**

The Action Needed Report contains information that can be used for creating daily or weekly reports to assist in developing task lists for individual case managers or for Child Find team activities. To run an Action Needed Report, select the appropriate find criteria (see Figure 17).

The following data are entered for the first section of the **Reports Find** screen:

- **Table**: ActionNeeded
- **Event**: (bypassed when ActionNeeded table is selected)
- **Field**: ANFollowUpDate
- **Value**: 1/2018

![Figure 17 Reports Find Screen Action Needed Find](image)

In this example, the found set of records would include children who had an *Action Needed Follow Up Date* during the month of January 2018.

After the find has been performed, select the sort option (see Figure 10) and then the **ACTION NEEDED REPORT** button (see Figure 11).
Exercise 4: Running an Action Needed Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the ACTION NEEDED option.
4. Select \textit{ANCompletedDate} from the field drop-down list.
5. Enter the following information:
   \textit{ActionNeededCompDate}: 1/2018
6. Click the PERFORM FIND button.
7. Click the SORT BY NAME button.
8. Click the ACTION NEEDED REPORT button.
10. Select the EXIT REPORT option.
Site Reports

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. If a user clicks the SITE REPORT button 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 a Site Report.

**FIGURE 18** Site Report Message

![Site Report Message](image-url)
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 Educational Plan/Individualized Family Support Plan (IEP/IFSP Date) events for each school year (see Figure 19).

FIGURE 19 Site Workload 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>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Contact</td>
<td>16/17</td>
<td>404</td>
<td>370</td>
<td>471</td>
<td>514</td>
<td>360</td>
<td>303</td>
<td>518</td>
<td>432</td>
<td>417</td>
<td>432</td>
<td>371</td>
<td>287</td>
<td>4877</td>
</tr>
<tr>
<td>First Contact</td>
<td>17/18</td>
<td>354</td>
<td>419</td>
<td>450</td>
<td>443</td>
<td>343</td>
<td>296</td>
<td>497</td>
<td>403</td>
<td>422</td>
<td>470</td>
<td>437</td>
<td>305</td>
<td>4906</td>
</tr>
<tr>
<td>First Contact</td>
<td>18/19</td>
<td>277</td>
<td>609</td>
<td>453</td>
<td>318</td>
<td>473</td>
<td>370</td>
<td>337</td>
<td>508</td>
<td>554</td>
<td>327</td>
<td>294</td>
<td>186</td>
<td>4704</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>1065</td>
<td>1369</td>
<td>1374</td>
<td>1273</td>
<td>1176</td>
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<td>1393</td>
<td>1235</td>
<td>1107</td>
<td>838</td>
<td>14486</td>
</tr>
<tr>
<td>Referral In</td>
<td>16/17</td>
<td>79</td>
<td>76</td>
<td>95</td>
<td>75</td>
<td>66</td>
<td>46</td>
<td>120</td>
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<td>84</td>
<td>80</td>
<td>86</td>
<td>65</td>
<td>943</td>
</tr>
<tr>
<td>Referral In</td>
<td>17/18</td>
<td>79</td>
<td>83</td>
<td>93</td>
<td>95</td>
<td>93</td>
<td>83</td>
<td>122</td>
<td>95</td>
<td>94</td>
<td>96</td>
<td>85</td>
<td>84</td>
<td>1102</td>
</tr>
<tr>
<td>Referral In</td>
<td>18/19</td>
<td>60</td>
<td>96</td>
<td>96</td>
<td>88</td>
<td>113</td>
<td>112</td>
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<td>100</td>
<td>101</td>
<td>121</td>
<td>74</td>
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<tr>
<td>Total</td>
<td></td>
<td>218</td>
<td>265</td>
<td>384</td>
<td>268</td>
<td>272</td>
<td>241</td>
<td>341</td>
<td>344</td>
<td>319</td>
<td>297</td>
<td>237</td>
<td>170</td>
<td>3236</td>
</tr>
<tr>
<td>Transition</td>
<td>16/17</td>
<td>106</td>
<td>56</td>
<td>72</td>
<td>112</td>
<td>68</td>
<td>80</td>
<td>71</td>
<td>106</td>
<td>84</td>
<td>79</td>
<td>89</td>
<td>95</td>
<td>1020</td>
</tr>
<tr>
<td>Transition</td>
<td>17/18</td>
<td>117</td>
<td>106</td>
<td>94</td>
<td>95</td>
<td>88</td>
<td>66</td>
<td>76</td>
<td>91</td>
<td>89</td>
<td>90</td>
<td>113</td>
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<td>1146</td>
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<td>Transition</td>
<td>18/19</td>
<td>92</td>
<td>107</td>
<td>88</td>
<td>99</td>
<td>100</td>
<td>104</td>
<td>90</td>
<td>96</td>
<td>94</td>
<td>38</td>
<td>29</td>
<td>2</td>
<td>952</td>
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<tr>
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<td></td>
<td>315</td>
<td>273</td>
<td>354</td>
<td>306</td>
<td>296</td>
<td>252</td>
<td>247</td>
<td>296</td>
<td>287</td>
<td>207</td>
<td>231</td>
<td>217</td>
<td>3120</td>
</tr>
<tr>
<td>Screening</td>
<td>16/17</td>
<td>111</td>
<td>79</td>
<td>280</td>
<td>366</td>
<td>230</td>
<td>222</td>
<td>252</td>
<td>300</td>
<td>294</td>
<td>291</td>
<td>282</td>
<td>272</td>
<td>2949</td>
</tr>
<tr>
<td>Screening</td>
<td>17/18</td>
<td>154</td>
<td>289</td>
<td>390</td>
<td>312</td>
<td>281</td>
<td>216</td>
<td>280</td>
<td>299</td>
<td>296</td>
<td>285</td>
<td>316</td>
<td>303</td>
<td>3331</td>
</tr>
<tr>
<td>Screening</td>
<td>18/19</td>
<td>123</td>
<td>278</td>
<td>270</td>
<td>209</td>
<td>205</td>
<td>178</td>
<td>188</td>
<td>212</td>
<td>221</td>
<td>130</td>
<td>146</td>
<td>8</td>
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<td>616</td>
<td>616</td>
<td>616</td>
<td>611</td>
<td>700</td>
<td>744</td>
<td>583</td>
<td>8486</td>
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<td>Evaluation</td>
<td>16/17</td>
<td>111</td>
<td>150</td>
<td>248</td>
<td>279</td>
<td>191</td>
<td>165</td>
<td>204</td>
<td>204</td>
<td>180</td>
<td>231</td>
<td>194</td>
<td>195</td>
<td>2353</td>
</tr>
<tr>
<td>Evaluation</td>
<td>17/18</td>
<td>109</td>
<td>222</td>
<td>242</td>
<td>250</td>
<td>200</td>
<td>164</td>
<td>228</td>
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<td>217</td>
<td>237</td>
<td>218</td>
<td>256</td>
<td>2560</td>
</tr>
<tr>
<td>Evaluation</td>
<td>18/19</td>
<td>114</td>
<td>235</td>
<td>241</td>
<td>198</td>
<td>168</td>
<td>171</td>
<td>183</td>
<td>253</td>
<td>154</td>
<td>231</td>
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<td>650</td>
<td>622</td>
<td>613</td>
<td>471</td>
<td>7061</td>
</tr>
<tr>
<td>ESE Eligibility</td>
<td>16/17</td>
<td>114</td>
<td>191</td>
<td>194</td>
<td>235</td>
<td>180</td>
<td>196</td>
<td>209</td>
<td>209</td>
<td>184</td>
<td>210</td>
<td>188</td>
<td>221</td>
<td>2331</td>
</tr>
<tr>
<td>ESE Eligibility</td>
<td>17/18</td>
<td>146</td>
<td>180</td>
<td>229</td>
<td>222</td>
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<td>225</td>
<td>207</td>
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<td>198</td>
<td>222</td>
<td>254</td>
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<td>18/19</td>
<td>106</td>
<td>260</td>
<td>250</td>
<td>195</td>
<td>194</td>
<td>197</td>
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<td>206</td>
<td>229</td>
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<td>236</td>
<td>130</td>
<td>2306</td>
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<td>631</td>
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<td>652</td>
<td>577</td>
<td>559</td>
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<td>631</td>
<td>551</td>
<td>568</td>
<td>505</td>
<td>7119</td>
</tr>
<tr>
<td>IEP/IFSP</td>
<td>16/17</td>
<td>105</td>
<td>167</td>
<td>170</td>
<td>220</td>
<td>170</td>
<td>182</td>
<td>195</td>
<td>197</td>
<td>171</td>
<td>193</td>
<td>172</td>
<td>216</td>
<td>2158</td>
</tr>
<tr>
<td>IEP/IFSP</td>
<td>17/18</td>
<td>135</td>
<td>168</td>
<td>219</td>
<td>213</td>
<td>190</td>
<td>167</td>
<td>207</td>
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<td>206</td>
<td>183</td>
<td>207</td>
<td>231</td>
<td>3237</td>
</tr>
<tr>
<td>IEP/IFSP</td>
<td>18/19</td>
<td>101</td>
<td>249</td>
<td>237</td>
<td>184</td>
<td>180</td>
<td>164</td>
<td>152</td>
<td>191</td>
<td>210</td>
<td>135</td>
<td>215</td>
<td>127</td>
<td>2145</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. 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
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 Educational Plan/Individualized Family Support Plan (IEP/IFSP Date) event for each school year (see Figure 20).

**Figure 20** Site Unduplicated Report

| Sum Of Count | Month | Category | Year | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Grand Total |
|--------------|-------|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------------|
|              |       | First Contact | 16/17 | 404 | 370 | 471 | 514 | 360 | 303 | 516 | 432 | 417 | 412 | 371 | 287 | 4817 |
|              |       | First Contact | 17/18 | 384 | 419 | 492 | 443 | 343 | 265 | 497 | 403 | 422 | 416 | 427 | 385 | 4995 |
|              |       | First Contact | 18/19 | 277 | 609 | 483 | 316 | 473 | 370 | 337 | 506 | 504 | 327 | 294 | 186 | 4704 |
|              |       | First Contact | Total | 1066 | 1388 | 1374 | 1273 | 1176 | 929 | 1350 | 1434 | 1293 | 1225 | 1102 | 838 | 14468 |
|              |       | Transition | 16/17 | 106 | 58 | 72 | 112 | 67 | 83 | 71 | 105 | 83 | 79 | 89 | 96 | 1016 |
|              |       | Transition | 17/18 | 117 | 108 | 83 | 94 | 58 | 80 | 76 | 91 | 89 | 90 | 113 | 119 | 1140 |
|              |       | Transition | 18/19 | 92 | 107 | 88 | 99 | 100 | 104 | 100 | 99 | 94 | 58 | 29 | 2 | 952 |
|              |       | Transition | Total | 315 | 273 | 263 | 302 | 293 | 252 | 247 | 296 | 296 | 285 | 315 | 303 | 3326 |
|              |       | Screening | 16/17 | 111 | 79 | 270 | 306 | 229 | 221 | 251 | 303 | 284 | 250 | 280 | 270 | 2840 |
|              |       | Screening | 17/18 | 164 | 289 | 290 | 313 | 277 | 215 | 279 | 209 | 295 | 265 | 315 | 303 | 3326 |
|              |       | Screening | 18/19 | 123 | 276 | 269 | 206 | 205 | 178 | 186 | 212 | 221 | 130 | 143 | 8 | 2164 |
|              |       | Screening | Total | 398 | 646 | 835 | 883 | 711 | 614 | 718 | 811 | 781 | 703 | 743 | 581 | 8420 |
|              |       | Evaluation | 16/17 | 111 | 154 | 247 | 278 | 190 | 165 | 204 | 178 | 229 | 197 | 196 | 238 | 2358 |
|              |       | Evaluation | 17/18 | 190 | 221 | 241 | 249 | 200 | 163 | 227 | 217 | 217 | 218 | 216 | 296 | 2690 |
|              |       | Evaluation | 18/19 | 114 | 235 | 241 | 196 | 185 | 171 | 153 | 183 | 203 | 153 | 201 | 17 | 2137 |
|              |       | Evaluation | Total | 334 | 610 | 729 | 725 | 578 | 502 | 614 | 604 | 640 | 620 | 616 | 471 | 7051 |
|              |       | ESE Eligibility | 16/17 | 109 | 186 | 195 | 206 | 178 | 195 | 206 | 184 | 208 | 189 | 222 | 2321 |
|              |       | ESE Eligibility | 17/18 | 145 | 180 | 229 | 229 | 203 | 176 | 224 | 207 | 216 | 198 | 222 | 256 | 2470 |
|              |       | ESE Eligibility | 18/19 | 106 | 260 | 250 | 195 | 194 | 197 | 162 | 206 | 229 | 143 | 236 | 130 | 2305 |
|              |       | ESE Eligibility | Total | 360 | 826 | 874 | 851 | 575 | 585 | 586 | 623 | 631 | 549 | 647 | 658 | 7107 |
|              |       | IEP/IFSP | 16/17 | 100 | 152 | 171 | 221 | 165 | 151 | 190 | 197 | 171 | 191 | 173 | 216 | 2140 |
|              |       | IEP/IFSP | 17/18 | 135 | 168 | 219 | 212 | 190 | 165 | 207 | 202 | 205 | 183 | 207 | 233 | 2329 |
|              |       | IEP/IFSP | 18/19 | 101 | 249 | 237 | 154 | 180 | 164 | 152 | 191 | 210 | 135 | 215 | 127 | 2145 |
|              |       | IEP/IFSP | Total | 336 | 570 | 627 | 617 | 638 | 513 | 554 | 580 | 586 | 509 | 595 | 576 | 6520 |

The Site 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 (Workload Only) - Referral Date
- Transition - Transition Meeting Date or Part C to Part B Referral Date
- Screening - Date of First Result
- Evaluation - Completion Date
- ESE Eligibility - ESE Eligibility Date
- IEP/IFSP - IEP/IFSP Date

CHRIS Help Desk: (800) 231-5747
Timeline Reports

Timeline Reports display the number of completed Timelines grouped by days elapsed. Based on the initial search for the Transition Conference Date, Referral for Screening Date, or Staff Assigned (see Figure 21), the Timeline Report will calculate the total number of completed Timelines (within 45, 60, 90, 120, or more days) for each category listed.

A Timeline is considered complete when there is an End Timeline event.

**Figure 21** Timelines Interval Summary Report Criteria Screen

<table>
<thead>
<tr>
<th>Date</th>
<th>Timelines Interval Summary Report Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/5/2020</td>
<td></td>
</tr>
</tbody>
</table>

Transition Meeting Date: [Field]
Referral For Screening Date: [Field]
Staff Assigned: [Field]

To run a Timeline report, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 2).

Step 2. Click the TIMELINE REPORTS button. The Timelines Interval Summary Report Criteria screen will be displayed (see Figure 21).

*NOTE* Clicking the CANCEL button will return you to the Reporting screen.
Step 3. Enter the Transition Conference Date, Referral for Screening Date, and/or Staff Assigned.

Step 4. Click the PERFORM FIND button. The Timelines Interval Summary Report Selection screen will be displayed (see Figure 22).

**Figure 22** Timelines Interval Summary Report Selection Screen

Step 5. Select a summary report type. Choose one of the following options:

- **INTERVALS BY COUNTY** – Displays the number of completed Timelines by county name.

- **INTERVALS BY SIZE ALIKE** – Displays the number of completed Timelines by county size. For example: small, medium/small, medium, large, and very large.

- **INTERVALS BY PRIMARY EXCEPTIONALITY** – Displays the number of completed Timelines by primary exceptionality.

- **INTERVALS COMBINED** – Displays the number of completed Timelines by any combination of the categories listed above.

- **MORE INTERVALS BY COUNTY (SUMMARY ONLY)** – Displays the number of completed timelines by county name along with additional timeline detail.

*Clicking the CANCEL button will return you to the Reporting screen.*
Step 6. After making a report selection, a warning is displayed to indicate that the Timeline Interval Summary Report must be displayed in Preview Mode (see Figure 23). Click the OK button to display the report.

**FIGURE 23** Timelines Interval Preview Warning

A sample Timeline Interval by County Report in Preview Mode is shown in Figure 24. This is how the report will be displayed when printed.

**FIGURE 24** Timelines Interval by County Report Screen (Preview Mode)

<table>
<thead>
<tr>
<th>County Of Residence</th>
<th>1 to 45</th>
<th>46 to 60</th>
<th>61 to 90</th>
<th>91 to 120</th>
<th>Greater Than 120</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pasco</td>
<td>6</td>
<td>7</td>
<td>22</td>
<td>12</td>
<td>60</td>
</tr>
<tr>
<td>Pasco</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

FDLRS/Gulfcoast Associate Center, Pasco
7227 Land O' Lakes Blvd.
Land O' Lakes FL 34639
Report Date: 06/05/20
Report Time: 16:11:48
Exercise 5: Running Timeline Reports

1. Select the REPORTS option from the main menu.
2. Click the TIMELINE REPORTS button.
3. Enter the following information:
   Referral For Screening Date: 7/1/2017...1/1/2018
4. Click the PERFORM FIND button.
5. Click the INTERVALS BY COUNTY button.
6. Click the OK button.
7. Select FILE from the FileMaker Menu.
8. Select the BACK TO REPORTS option.
10. Click the OK button.
11. Select FILE from the FileMaker Menu.
12. Select the EXIT REPORTS option.
Providers & Contacts Reports

The Providers & Contacts Reports include listings of the provider and contact personnel who work with an individual FDLRS site.

To run a Providers & Contacts Report, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The Reporting screen will be displayed (see Figure 2).

Step 2. Click the PROVIDER & CONTACTS REPORT button. The Providers & Contacts Reporting screen will be displayed (see Figure 25).

Step 3. Select one of the following report options:

- RUN ALL PROVIDER REPORT – Produces a list of providers
- RUN ALL CONTACT REPORT – Produces a list of contacts
- RUN ACRONYM REPORT – Produces a list of agency acronyms
- RUN ACTIVE PROVIDER REPORT – Produces a list of active providers
- RUN ACTIVE CONTACT REPORT – Produces a list of active contacts

Clicking the EXIT TO MAIN FILE button will return you to the Reporting screen.
Custom Reports

Custom reports can be created in CHRIS using the Reporter program.

Reporter

The Reporter program was developed to provide users with the flexibility to create custom report layouts and to modify existing report layouts. Reporter can be used to produce letters, forms, lists, tables, and other types of summarized data as well as to provide data to site managers and administrators. Reporter has no permission restrictions and is available to all CHRIS users. Users can duplicate, rename, change, or add on to layouts to produce more advanced reports. The Reporter program also allows the creation of FileMaker scripts, which can be customized in any report to facilitate performing finds, sorting, and printing. As such, a basic understanding of the CHRIS program and the FileMaker Pro application is required to design custom reports.

If you are interested in learning more about creating custom CHRIS reports, contact the CHRIS Help Desk to schedule an Advanced Reports training session. Additional information about custom reports is available in the Advanced Reports Manual.