CHRIS

Children's Registry and Information System

User Manual

Technical Support Information

5665 Ponce de Leon Blvd.
Coral Gables, FL 33146
(800) 231-5747
chris.um@miami.edu
http://www.chris.miami.edu

About This Manual

The purpose of this manual is to explain the major features of the Children's Registry and Information System (CHRIS) program. The *User Manual* is intended for users who do not have experience working with CHRIS. It contains hands-on exercises and focuses on the information covered in the CHRIS New User Training session.

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

This document was developed by the University of Miami, Department of Psychology through CHRIS, an IDEA-funded state project through the Florida Department of Education, Bureau of Exceptional Education and Student Services.

Copyright
State of Florida
Department of State
2025

Authorization for reproduction is hereby granted to the state system of public education consistent with section 1006.39(2), Florida Statutes. No authorization is granted for distribution or reproduction outside the state system of public education without prior approval in writing.

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, 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 to highlight information essential to the integrity and/or performance of CHRIS.

The NOTE icon is used to highlight helpful suggestions or information that deserves special attention.

Abbreviations

BEESS	Bureau of Exceptional Education and Student Services
CHRIS	Children's Registry and Information System
COS	Child Outcomes Summary
ES	Early Steps
ESE	Exceptional Student Education
FAPE	Free Appropriate Public Education
FDLRS	Florida Diagnostic and Learning Resources System
FDOE	Florida Department of Education
IDEA	Individuals with Disabilities Education Act
IEP	Individual Educational Plan
IFSP	Individualized Family Support Plan
LEA	Local Education Agency
TATS	Technical Assistance & Technical Systems

Table of Contents

About This Manual ..... **ii**
Legend ..... **iii**
Abbreviations ..... **iv**
General Information **1**
Dates 1
Deleting Records 1
The Basics **2**
CHRIS, FDLRS Child Find, Child Find process, TATS and district LEAs 2
Data Entry – Important Points 3
Security Issues 4
Using CHRIS **7**
Log into CHRIS 7
General Screen Layout 8
Main Menu Options 9
Using the Record Locator Screen 10
Data Entry Screen Structure 20
Child Demographic Information **22**
Demographic Screen Detail 22
Tracking Summary **26**
Tracking Screen Detail 26
Timeline Events 29
Service Coordination 47
Advanced Search Options **52**
Available Fields 52
Find Operators 53
Locator Junior **54**
Reports in CHRIS **55**
Reports Find Screen **58**
Standard Reports **61**
Print Address Labels 61
Group Data by Sub-categories and Use CHRIS to Print Letters and Forms 62
Forms 63
Print Option **66**
Help **69**
Sign Out **69**

General Information

Dates

When entering dates:

- Use only four-digit years
- Use only two-digit month and day
- Use only slashes (/) to separate the month, day, and year (e.g., 06/01/2024)

Deleting Records

Only two types of records can be deleted:

- Significant adults
- Service Coordination events (with the exception of the Referral First Contact with FDLRS event, which cannot be deleted)

The Basics

CHRIS, FDLRS Child Find, Child Find process, TATS and district LEAs

CHRIS

Children's Registry and Information System (CHRIS) is a statewide registry used by FDLRS centers and districts. The CHRIS database contains information on children with or at risk for disabilities that may affect their future school performance. The registry is designed to collect demographic and screening information, eligibility, services and student outcomes.

CHRIS is a database program that was designed to meet State Improvement Plan Goals. Input from users, members of the CHRIS Technical Assistance Work Group (TAWG), and representatives from the Florida Department of Education (FDOE) guide the development of CHRIS.

Use of CHRIS Information

The data collected in CHRIS are used by a variety of sources for the following reasons:

- To facilitate case management
- To collect COS (Child Outcomes Summary) data
- To generate COS reports
- To allocate funds
- To track service delivery using timelines
- To project the needs of the service delivery system
- To compile reports for the federal and state governments, school districts, and LEAs (Local Education Agencies)
- To respond to requests for information from consumers and service providers
- To prevent the duplication of services and to ensure that the appropriate services are being provided to eligible children
- To provide program and service planning information for agencies and program administrators
- To identify gaps in the service system where additional resources may need to be identified or developed
- To conduct research studies

It is important to remember that the data and reports produced are not solely used internally at each site.

Data Entry – Important Points

Confidentiality

The information in CHRIS is confidential. The records in the database should be given the same consideration as confidential paperwork, file folders, and other materials containing personal information.

Adherence to Directions

Follow the instructions for data entry provided in this manual and from the data facilitator. If you are not sure how to solve a problem, contact the data facilitator. If the data facilitator is not available, contact the CHRIS Help Desk at (800) 231-5747. Do not guess at the solution. Using the system only as explained in this manual will prevent problems from occurring.

NOTE

Data facilitators are the primary contacts for CHRIS users at each of the 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.

Consistent Data Entry

It is important that all of the fields used for producing reports be entered in a consistent manner. Drop-down lists are provided in CHRIS to promote consistency in data entry. All drop-down lists are shown with a down arrow to the right of the field. Whenever possible, select an item from the drop-down list. Some drop-down lists will allow text to be entered manually. Please check with the data facilitator prior to entering text into a field with a drop-down list.

Security Issues

Due to the sensitivity of these data, both an account name and password are required to sign into the CHRIS program and to authenticate user information. Users will receive an initial email to their email address on-file asking them to setup their password.

A unique login combination of an account name and password is required for the following reasons:

- Access levels vary. By sharing an account name and password, one user could give another user access to information the user is not authorized to view or modify.
- User activity is recorded. A record is maintained of the user that created and/or edited each record. By sharing an account name and password, the information recorded regarding user activity would be incorrect.

Account Name

The email address The Help Desk has on-file will be the account name used to login to CHRIS.

Select a Password

Upon the first login to CHRIS, a prompt will appear asking for a new password. Each user should select his/her own password. Passwords should be easy to remember, but do not pick obvious passwords. Examples of ineffective passwords include first and last names, relatives' names, and pets' names. Password must be a minimum of eight characters including a mix of numbers, letters, caps and other characters.

Guard the Password

Do not share passwords with others, post your login information on a Post-it note on the computer monitor, or yell it down a hallway in an office environment. If a password is publicly known, the data facilitator should have the user reset their password by clicking the "Forgot Password" option. It is acceptable to write passwords down and store them in a secure place.

Login Access

The level of access allowed will be determined by the center manager and data facilitator based on job duties and security clearance. The following types of access are available in CHRIS:

Record Access Based on Geography

- 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

Record Edit Access

- View Only
- View and Edit
- View, Edit, and Delete Service Coordination events and Significant Adult Records

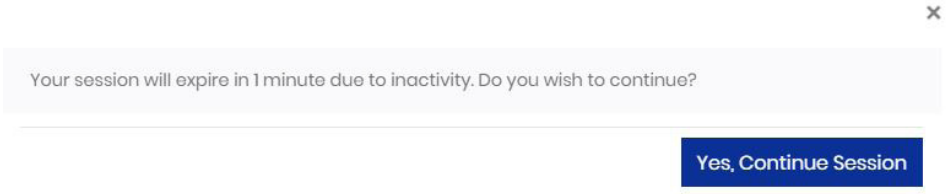
The data facilitator is responsible for contacting the Help Desk to add new user accounts. COS users should contact their regional facilitator. The Data Facilitator should contact the Help Desk to receive a link to the New User Data Form. To delete user accounts that are no longer active, the Data Facilitator should email chris.um@miami.edu to inform the Help Desk of users who should be de-activated in the system.

Log Out When Leaving the Desk Area

CHRIS should not be left open and unattended if it is in a non-secure area (e.g., an area accessible to the public). Users who are logged into the CHRIS Database must be aware of the following issues:

- Users can leave the CHRIS program session idle (not in use) for 20 minutes.
- After 20 minutes of idle time, a message will be displayed notifying the user that their session will expire in one minute if they do not click the "Yes, Continue Session" button (see Figure 1).

FIGURE 1: **Session Expiry Message**



Data security is an important issue. Be sure to sign out of the CHRIS program session if you will not be using the database for a long period of time.

Using CHRIS

Log into CHRIS

The **Login** screen is accessed by clicking on the CHRIS icon on the desktop. The default internet browser will open and the login window will be displayed. You can also navigate directly to the **Login** screen by entering: https://portal.chris.miami.edu into any internet browser. The cursor is conveniently placed in the *Email Address* field for quick data entry. Email addresses are not case sensitive. Passwords are case sensitive and dots will be displayed in place of the characters. There is an eight character minimum when creating a password. To change a password, click the FORGOT PASSWORD? link to receive an email that will contain a link which allows for a password to be changed.

To log into the CHRIS program, complete the following steps:

1. Double-click on the CHRIS icon on the desktop. The **Login** screen will be displayed (see Figure 2).

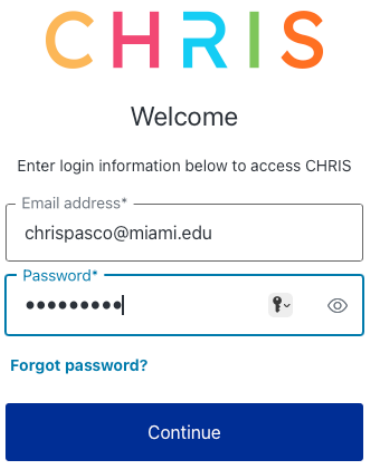
2. Type an email address in the *Email Address* field.
   Email Address: chrispasco@miami.edu

3. Tab into the *Password* field or click into it using the mouse.

4. Type in a password.
   Password: chrisguest

5. Press the enter key or click the CONTINUE button. The **Record Locator** screen will be displayed (see Figure 3).

FIGURE 2: **CHRIS Login Screen**

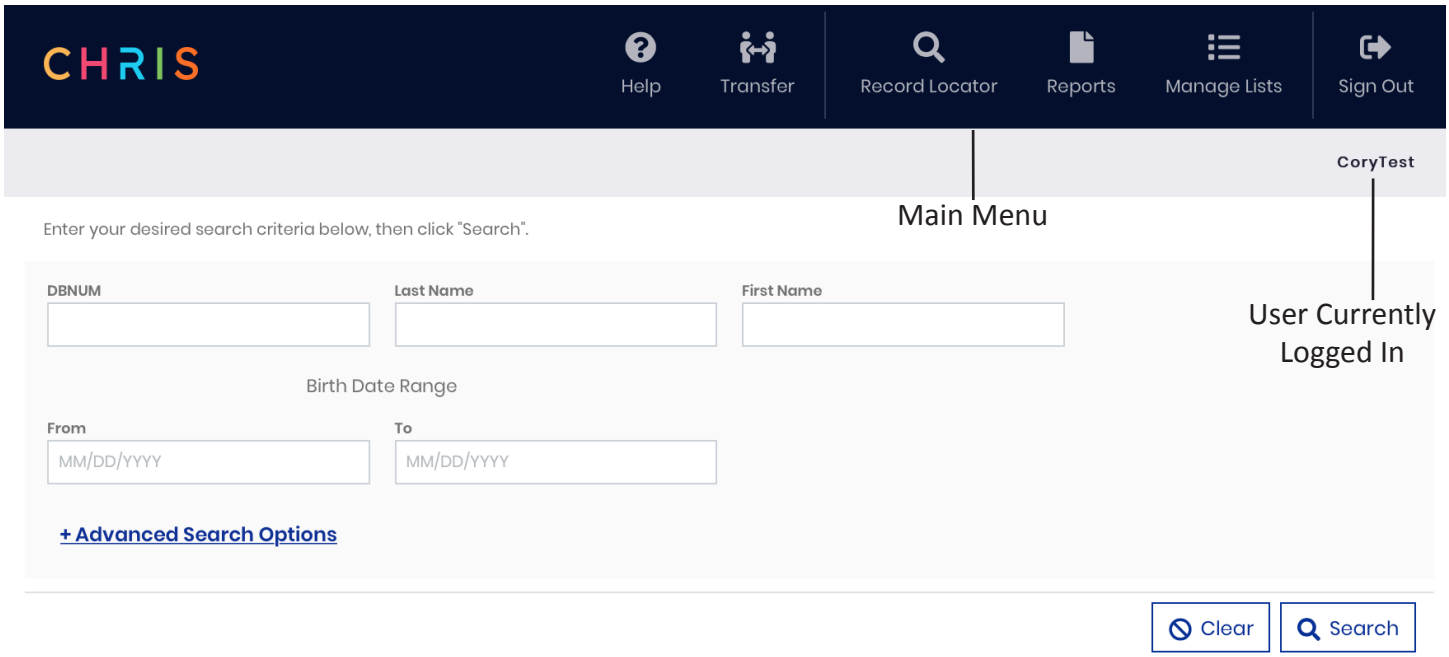


General Screen Layout

All of the screens in CHRIS will display the same two basic elements (see Figure 3).

- Main menu (top bar) – The main options and functions available in CHRIS
- User currently logged in (top-right corner) – The account name of the person currently working in CHRIS

FIGURE 3: Record Locator Screen



NOTE

To perform a find using a single date, use the FROM field only on the* Child Record Locator *screen.

Main Menu Options

The main menu is located on the top of all of the screens in CHRIS. The menu options are consistent throughout CHRIS. Selecting a main menu option displays the corresponding screen.

Main Menu	Description
Help	Opens the CHRIS Field Reference Guide for assistance.
Transfer	Initiates the record transfer process (Data Facilitators only).
Record Locator	Opens a blank **Record Locator** screen to add a child, find a child's record, or find a group of records.
Reports	Opens the **Reporting** screen and allows users to create standard and site specific reports.
Manage Lists	Allows Data Facilitators to manage drop-down lists throughout CHRIS.
Sign Out	Used to exit out of CHRIS.

Using the Record Locator Screen

After a successful login into CHRIS, the **Record Locator** screen is displayed (see Figure 4). The **Record Locator** screen provides the option to add a child's record, find a child's record, or find a group of children's records. When a found set of records has been located, additional display options, record access options, and sort options become available.

FIGURE 4: Record Locator Screen

49 records found

DBNUM	Last Name	First Name	Birth Date	Code	Residence County	District	Sig Adult Last Name	Timeline Status	COS	Demo	Track
446396	Asi	Aju	03/06/2016		Archived	Archived	Asi				
447276	Asi	Aal	10/06/2020		Pinellas	Pinellas	Asi				
467902	Asi	Ast	11/18/2017		Broward	Broward	Tsc	ET			
479179	Asi	Aan	04/04/2017	Purple Team	Lee	Lee	ri	ET			
485951	Asi	Ava	08/22/2016	Area N	Archived	Archived	Aor	ET			
487487	Asi	Aga	10/13/2016		Archived	Archived	Oca	ET			
490471	Asi	Aai	05/17/2016		Pinellas	Manatee	Asi	ET			
493996	Asi	Aai	11/22/2016	Area C	Archived	Archived	Hso	ET			
510115	Asi	Aan	12/31/2016	QQIEIPS/TN	Orange	Orange	Gas	ET			
512241	Asi	Aal	06/28/2017	Blue Team	Lee	Lee	Asi	ET			

10 ▾ 1 2 3 4 5 ›

Add a Child's Record

Adding a child's record is a process that must be completed from the **Child Record Locator** screen. A search must be performed to ensure that the child does not have an existing record in the database. If no record exists for the child, the option to add the child will become available.

To add a child's record, complete the following steps:

1. Perform a search. Type the child's first name and last name and/or any additional information in the search fields displayed.

NOTE

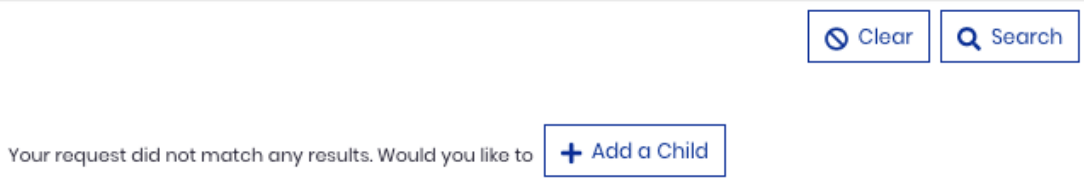
The* Record Locator *screen will execute an exact match search. If the find request is too specific, the child's existing record may not be included in the found set. If the find request is too general, the found set may be very large, making it difficult to identify the record of interest.

Clicking the CLEAR button on the* Record Locator *screen will remove all existing search criteria.

2. Click the SEARCH button or press enter key. If one or more matching records are found, they will be displayed on the **Record Locator** screen (see Figure 4).

3. Review the results. Scroll through the records and locate the appropriate child's record. If no records are found, the following message will be displayed (see Figure 5).

FIGURE 5: No Records Message



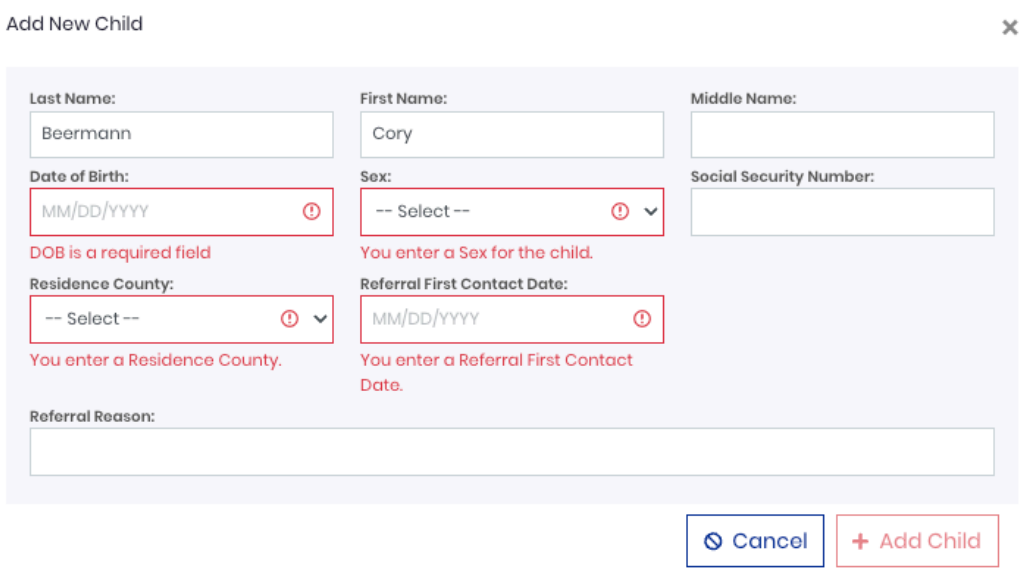
Options

- ADD CHILD (default) – Opens the **Add New Child** screen.
- CLEAR – Returns to the **Record Locator** screen and removes the search criteria previously entered.
- SEARCH – Can be used to perform a find after modifying the previously entered find criteria.

If the record to be added is found and the user has access to it as indicated by the small icon for Demo and small icon for Track , select the record by clicking either of these buttons to the right (see p. 14). If the child's record to be added is found in the database but belongs to another county, the existing record needs to be transferred using the Record Transfer process. Contact the data facilitator to transfer a child's record. For COS users, contact your TATS facilitator to initiate the transition process. If a child's record already exists, do not create a new record in the database.

4. Click the ADD CHILD button. The **Add New Child** screen will be displayed (see Figure 6).

FIGURE 6: Add New Child Screen



NOTE ***Click the CANCEL button to quit the add new child process.***

5. Review the data displayed. Verify that the name information displayed is accurate and complete because this is how the name will be created in the child's record and how it will be displayed in all reports.

6. Add additional information. The following fields are required: *Last Name, First Name, Date of Birth, Sex, Residence County,* and *First Contact with FDLRS Date.* These fields are identified with red outline if not filled in (see Figure 6).

NOTE ***All Event date fields utilize a calendar function for efficiency. To enter dates manually click in the date field twice. Use slashes, four-digit years and two-digit month and day format when entering dates.***

7. Click the ADD CHILD button. The program will run a required field check and an invalid birth date check. The following additional types of searches are also conducted to locate potential duplicate records:
   - Social Security Number
   - Last Name and First Name
   - First Letter of Last Name, First Letter of First Name, and Date of Birth

If there is a match, the child's record will be displayed on the **Duplicate Child Display** screen (see Figure 7).

FIGURE 7: Duplicate Child Display Screen

Possible Duplicate Records Detected

This child's record may already exist. Possible duplicate records will now be displayed. If the record you are looking for exists, select it. Otherwise click "Add Child" button to create a new child record.

+ Add a Child

2 records found

DBNUM	Last Name	First Name	Birth Date	Code	Residence County	District	Sig Adult Last Name	Timeline Status	COS	Demo	Track
669359	Aue	Jake	02/08/2021		Pinellas	Pinellas					
669428	Aue	Jake	07/03/2021		Pinellas	Pinellas					

20 1

8. Review potential duplicates for a match. If there are no matches, click the ADD A CHILD button. If any of the duplicates are a match, click the DEMO or TRACK button on the **Duplicate Child Display** screen to enter that child's record.

Exercise 1: Add a new child

1. Select the LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Aue
   First Name: Jake
   Birth Date: 01/01/2022 (Be sure to use four digits for the year!)
3. Click the SEARCH button.
4. Click the ADD a CHILD button.
5. Enter the following information:
   Sex: M
   Residence County: Pasco
   First Contact with FDLRS Date: 11/12/2024
6. Click the ADD CHILD button. A new child record has been created and you are taken to the child's demographic information.
7. If the child's race is not known at the time of creating the record, select "Un known" in the Race field to satisfy FDOE race reporting requirement.

Find a Child's Record

Finding a child's record should be performed using the **Record Locator** screen. A search is executed for a single matching record in the database that will be selected for data entry or reporting.

To find a child's record, complete the following steps:

1. Perform a search. Enter the child's first name and last name and/or any additional information in the search fields displayed. (see Figure 3)

NOTE

The* Record Locator *screen will execute an exact match search. If the find request is too specific, the child's existing record may not be included in the found set. If the find request is too general, the found set may be very large, making it difficult to identify the record of interest. This icon will be displayed if the current user does not have access.

2. Click the SEARCH button. If one or more matching records are found, they will be displayed on the **Record Locator** screen.

3. Review the results. Scroll through the records and locate the appropriate child's record.

4. Select a record. Click either the DEMO or the TRACK button on the far right to select a child's record (see Figure 8).

FIGURE 8 Record Locator Found Set Screen

Click this button to access the **Child Demographic Information** screen.

DBNUM	Last Name	First Name	Birth Date	Code	Residence County	District	Sig Adult Last Name	Timeline Status	COS	Demo	Track
669431	Arv	Sth	02/08/2021	FDLRS	Pinellas	Pinellas	Sth				

Click this button to access the **Tracking Summary** screen.

Exercise 2: Find a child's record using the Record Locator screen

1. Select the RECORD LOCATOR option from the main menu.
2. Enter the following information:
   Dbnum: 521827
3. Click the SEARCH button.
4. Click the TRACK button. The child's record has been selected.

Find a Group of Records

Finding a group of records should be performed using the **Record Locator** screen. Search criteria ranges should be used to locate a group of records in the database.

To find a group of records, complete the following steps:

1. Perform a search. Enter the Birth Date range search using the FROM and TO fields on the **Record Locator** screen. For example, to find all the children turning three within the 2022-2023 school year, enter 07/01/2019 in the *From* field followed by 06/30/2020 into the *To* field.

2. Click the SEARCH button. If one or more matching records are found, they will be displayed on the **Record Locator** screen.

3. Review the results. Scroll through the records and locate the appropriate record/s.

The **Record Locator** screen can display 500 records at a time. If more than 500 records are found, a message box will be displayed to prompt the user to revise the search (see Figure 9).

Figure 9: More than 500 Records Message

Your search returned more than 500 results. Please add additional search criteria to limit your search results.

Options

- To modify the find – Change the find criteria and click the SEARCH button again
- CLEAR – Stays on the **Record Locator** screen and deletes the existing search criteria.

Found Set Display

The found set of records in the **Record Locator** screen is displayed in a list view format (see Figure 10). Each record will display the *DBNUM, Last Name, First Name, Birth Date, Code, Residence County, District, Significant Adult Last Name, Timeline Status* and buttons to enter the **Child Outcomes Summary (COS), Demographics** or **Tracking** screens. A scroll bar on the right side of the screen is available. The total number of records for the found set is displayed in the top-left corner of the screen. To change the number of records displayed per screen, use the drop-down at the bottom left to make a selection. If multiple pages are needed to display the found set, selectable page numbers will appear at the bottom of the screen.

FIGURE 10: Found Set Display Information Screen

49 records found

DBNUM	Last Name	First Name	Birth Date	Code	Residence County	District	Sig Adult Last Name	Timeline Status	COS	Demo	Track
446396	Asi	Aju	03/06/2016		Archived	Archived	Asi				
447276	Asi	Aal	10/06/2020		Pinellas	Pinellas	Asi				
467902	Asi	Ast	11/18/2017		Broward	Broward	Tsc	ET			
479179	Asi	Aan	04/04/2017	Purple Team	Lee	Lee	ri	ET			
485951	Asi	Ava	08/22/2016	Area N	Archived	Archived	Aor	ET			
487487	Asi	Aga	10/13/2016		Archived	Archived	Oca	ET			
490471	Asi	Aai	05/17/2016		Pinellas	Manatee	Asi	ET			
493996	Asi	Aai	11/22/2016	Area C	Archived	Archived	Hso	ET			
510115	Asi	Aan	12/31/2016	QQIEIPS/TN	Orange	Orange	Gas	ET			
512241	Asi	Aal	06/28/2017	Blue Team	Lee	Lee	Asi	ET			

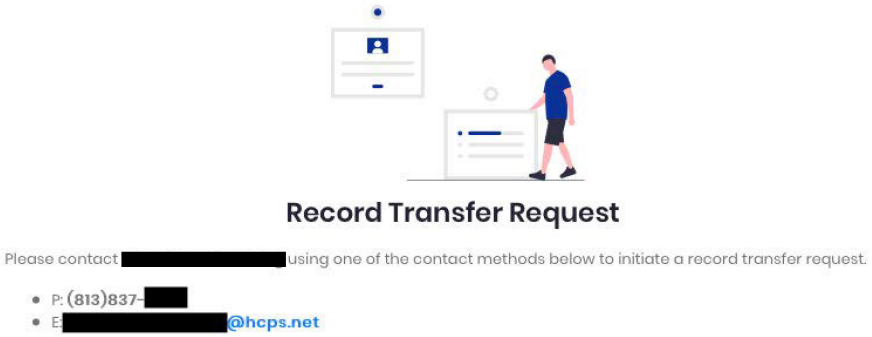
10
10
25
30
50

1 2 3 4 5 ›

Record Access

Record access is granted based on the *County of Residence* field. Anyone who has read/write access for the child's *County of Residence* can view and edit the record. For example, if ten records have been found (eight for Dade county, one for Monroe county, one for Bay county) and the data entry person is from Dade county, his/her access rights allow him/her to view and edit only the eight Dade county records. If a user tries to view a record that the user does not have access to, a message describing how to initiate a record transfer will be displayed (see Figure 11):

FIGURE 11: Record Ownership Message



A Record Transfer is required to gain access to a record owned by another FDLRS center. Use the contact information provided to contact the center's Data Facilitator and initiate the Record Transfer process. The COS record transfer works differently, please contact your TATS regional facilitator. Do not re-create or duplicate the record.

Exercise 3: Find more than one child's record using the Child Record Locator screen

1. Select the RECORD LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Sa
   First Name: As
3. Click the SEARCH button.
4. Find Sat, Ast and click the DEMO button.
5. Click the "X" to close the warning.
6. Find Sac, Ase and click the DEMO button. The child's record has been selected.

Sorting Records

Records displayed on the **Record Locator** screen can be sorted by clicking the column title buttons (see Figure 12). Click on a button to sort the records in either ascending or descending order. For example, clicking the LAST NAME button once will sort the records in ascending (A-Z) order based on the child's last name. Clicking the LAST NAME button a second time will sort the records in descending (Z-A) order.

FIGURE 12: Found Set Sort Buttons

DBNUM	Last Name	First Name	Birth Date	Code	Residence County	District	Sig Adult Last Name	Timeline Status	COS	Demo	Track
669431	Arv	Sth	02/08/2021	FDLRS	Pinellas	Pinellas	Sth				

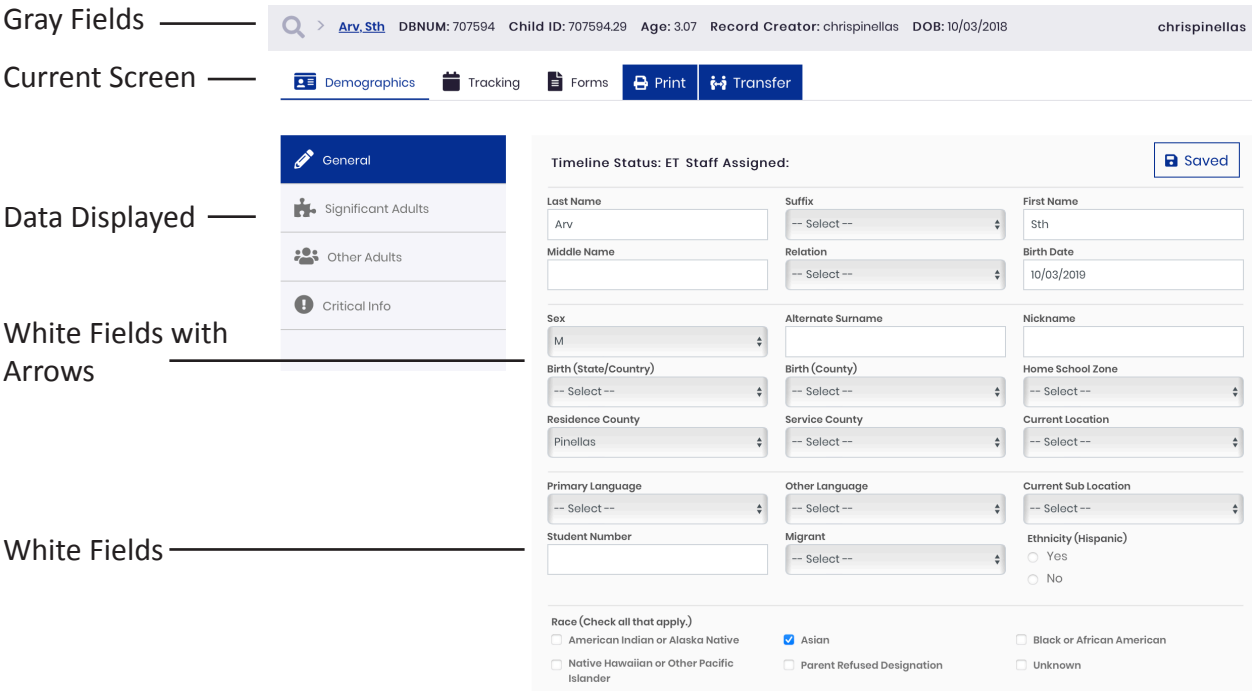
Exercise 4: Sort a group of records using the Child Record Locator screen

1. Select the LOCATOR option from the main menu.
2. Enter the following information:
   From: 01/01/2020 *To:* 01/03/2020
3. Click the SEARCH button. (178 records will be found.)
4. Click the BIRTH DATE button to sort the records in ascending order.
5. Find the oldest child in this group.
6. Click the BIRTH DATE button again to sort the records in descending order.
7. Find the youngest child in this group.
8. Click the RESIDENCE COUNTY button to sort the records in ascending order.
9. Click the RESIDENCE COUNTY button again to sort the records in descending order.
10. In this data set, find this record: Zso, Wma.

Data Entry Screen Structure

The data entry screens in CHRIS share several features. These features are identified in Figure 13 and are described below.

FIGURE 13: Data Entry Screen Features



Current Screen

The label for the displayed screen will be blue and underlined. Click the links to select the **Demographics** (see Figure 13), **Tracking** (see Figure 21) or **Forms** screen.

Data Displayed

The **General** screen (see Figure 14) is the default screen. Click the links to select **General, Significant Adults** (see Figure 15), **Other Adults** (see Figure 19) or **Critical Info** (see Figure 20) screens.

CHRIS will automatically save any data entered every 15 seconds. If a change is made or data are entered into a field and the user attempts to exit the record before the 15 second auto-save occurs, a message will be displayed warning of the need to save the new data.

Field Types

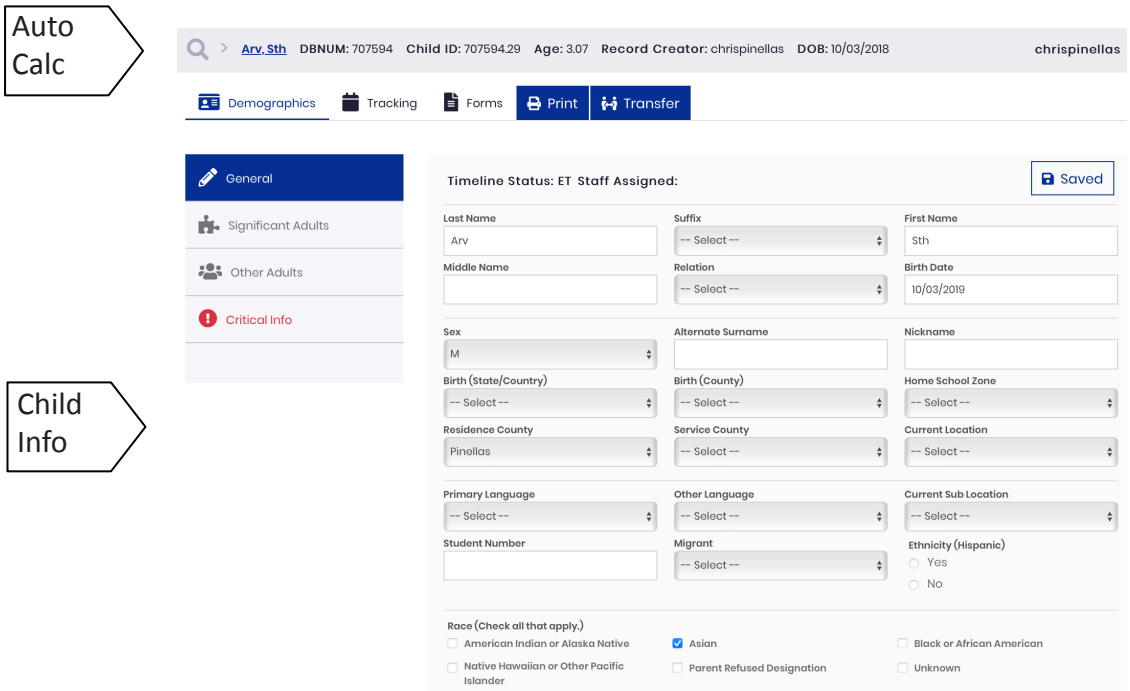
- Gray Fields
  The information in the gray fields throughout CHRIS is entered automatically based on information from another screen or file in CHRIS. The data in these fields cannot be modified.
- White Fields
  The white fields are free text or date fields. The data in these fields can be entered in any format (text, numeric, and/or symbols) and can be modified. A calendar will be displayed when clicking into a date field.
- White Fields with Arrows
  White fields with small arrow pointing down indicate that there is a drop-down list associated with a field. State-defined lists cannot be modified. Site-defined lists can be modified by the data facilitator.

Always select an option from a drop-down list rather than enter information directly into the field. Use of drop-down lists is important for data consistency and the appearance of reports (see page 3 – Consistent Data Entry).

Child Demographic Information

The **Demographic** screen contains demographic information pertaining to the individual child whose record is being viewed. (see Figure 14).

FIGURE 14: Child Demographic Information Screen



Demographic Screen Detail

Automatically Calculated Fields

The top section of the **Demographic** screen displays automatically generated data. These fields cannot be modified.

Child Information

The middle section of the **Demographic** screen contains the child's personal information.

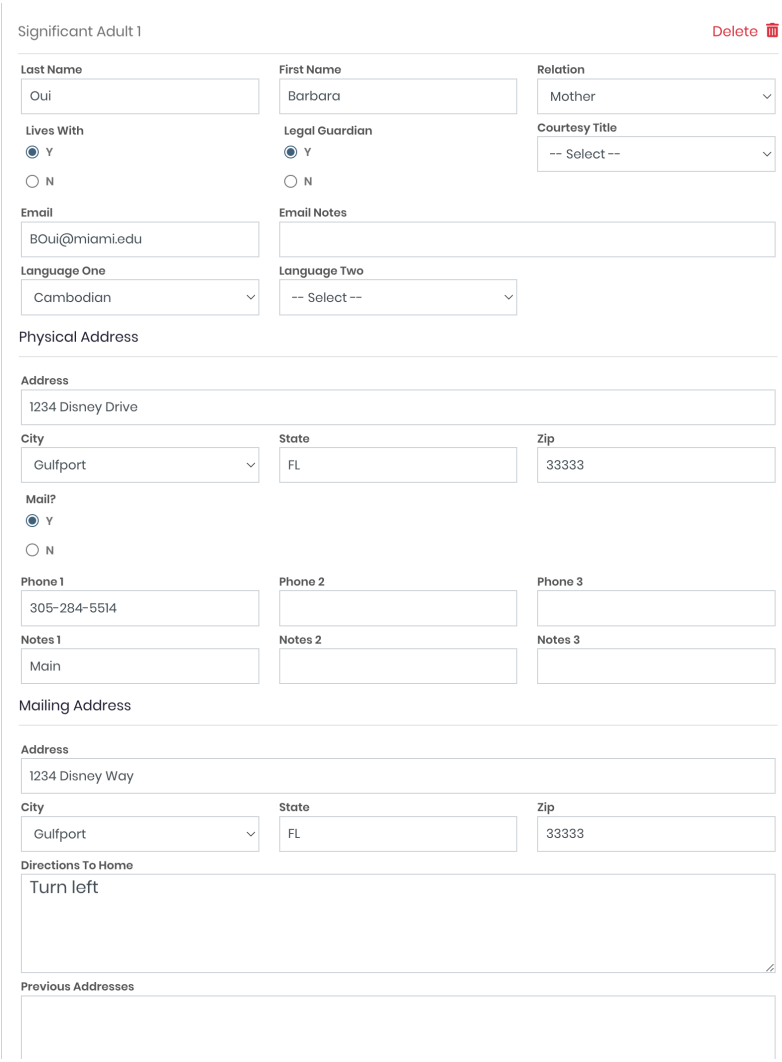
NOTE

In addition to the required fields necessary for adding a new child, at least one selection must be made to designate Race. The Service County field should also be entered at this time. FLEID is required for COS entry.

Significant Adult Information

The **Significant Adult Information** screen is viewed by clicking the SIGNIFICANT ADULT link in the Data Displayed window (see Figure 13). It contains personal information about the child's parents or legal guardians (see Figure 15). Click ADD ENTRY to add a new Significant Adult. There is no maximum number of Significant Adults that can be entered for each child. Each Significant Adult can be viewed by clicking the corresponding link at the top of the screen or by using the scroll bar at the right side of the scren. If the user has "delete" priviliges, all Significant Adult records can be permanently deleted.

FIGURE 15: Significant Adults Information Section



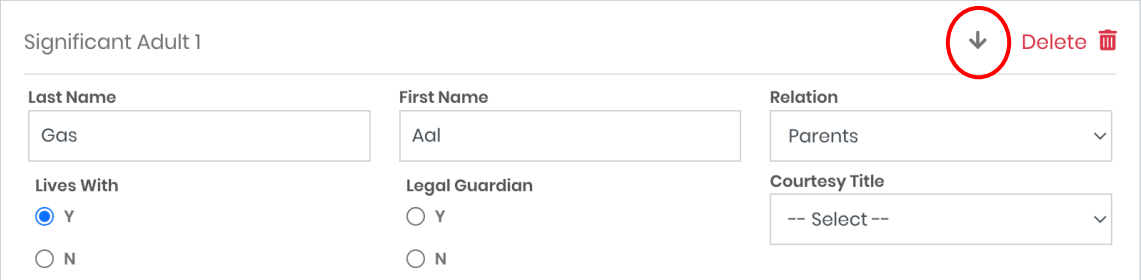
NOTE

CHRIS can be used to create address labels. To prepare Significant Adult records to be used for address labels, make sure to select "Y" in the LW (Lives With field) to mark the specific Significant Adult records that will be printed onto address labels. Significant Adult records are not required for COS.

Significant Adult Sorting

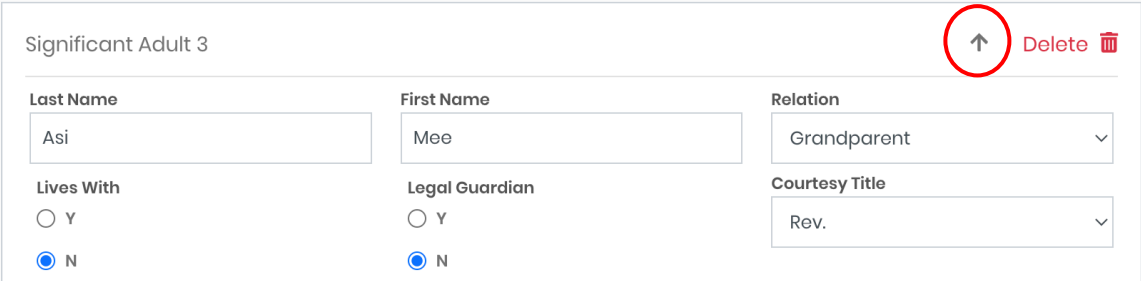
Users can sort Significant Adult records so they appear in the order determined most appropriate for case management.

FIGURE 16: Significant Adults Down Arrow



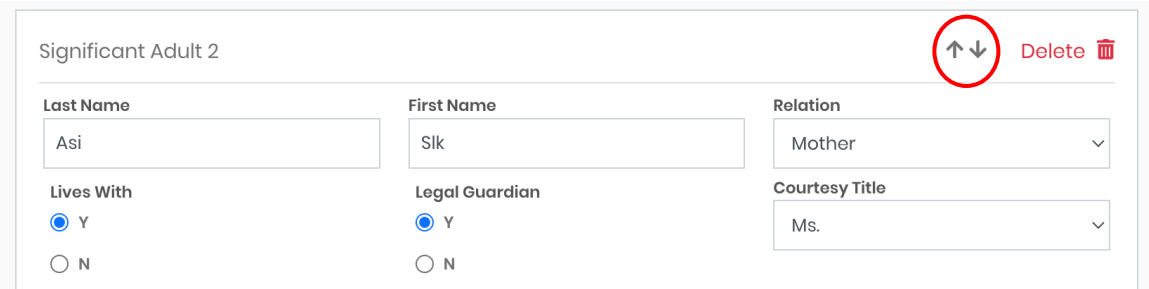
To move a Significant Adult record down in the order of Significant Adults, use the down arrow (see Figure 16) next to the “Delete” button.

FIGURE 17: Significant Adults Up Arrow



To move a Significant Adult record up in the order of Significant Adults, use the up arrow (see Figure 17) next to the “Delete” button.

FIGURE 18: Significant Adults Up & Down Arrows

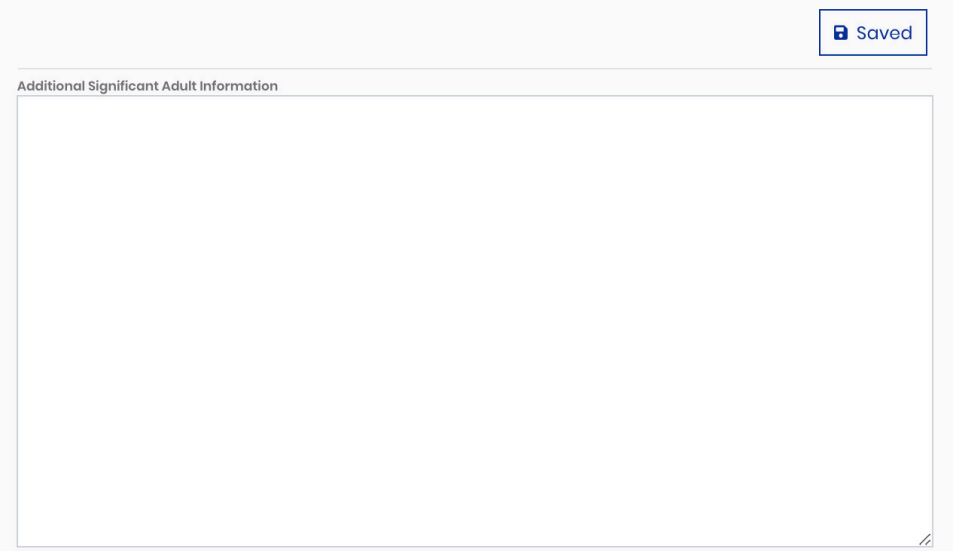


If a Signigicant Adult record appears in the middle of a list, use the corresponding up or down arrow (see Figure 18) to move the record up or down in the list. Once reordering of Significant Adult records is complete, remember to click the “Save” button.

Other Adults

The **Other Adults** section contains information pertaining to other adults with whom service coordinators make arrangements concerning this child (see Figure 19).

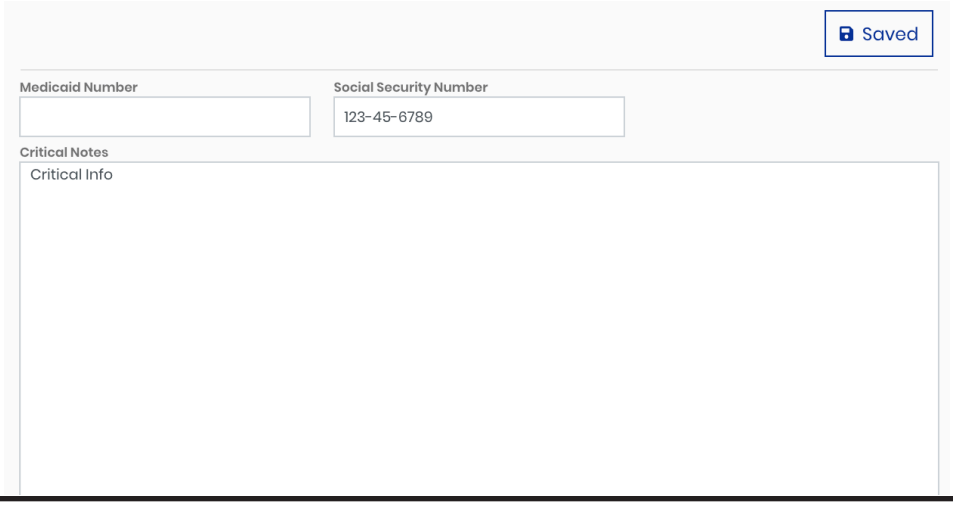
FIGURE 19: Other Adult Information Section



Critical Information

The **Critical Information** section contains information that needs to be considered when working with the child or family but should not be a part of the open record. Once data is entered in this screen, the Critical Info link will turn red (see Figure 14) The *Social Security Number* must be entered in the appropriate format (123-45-6789; see Figure 20) or the text will turn red to indicate that it was entered incorrectly.

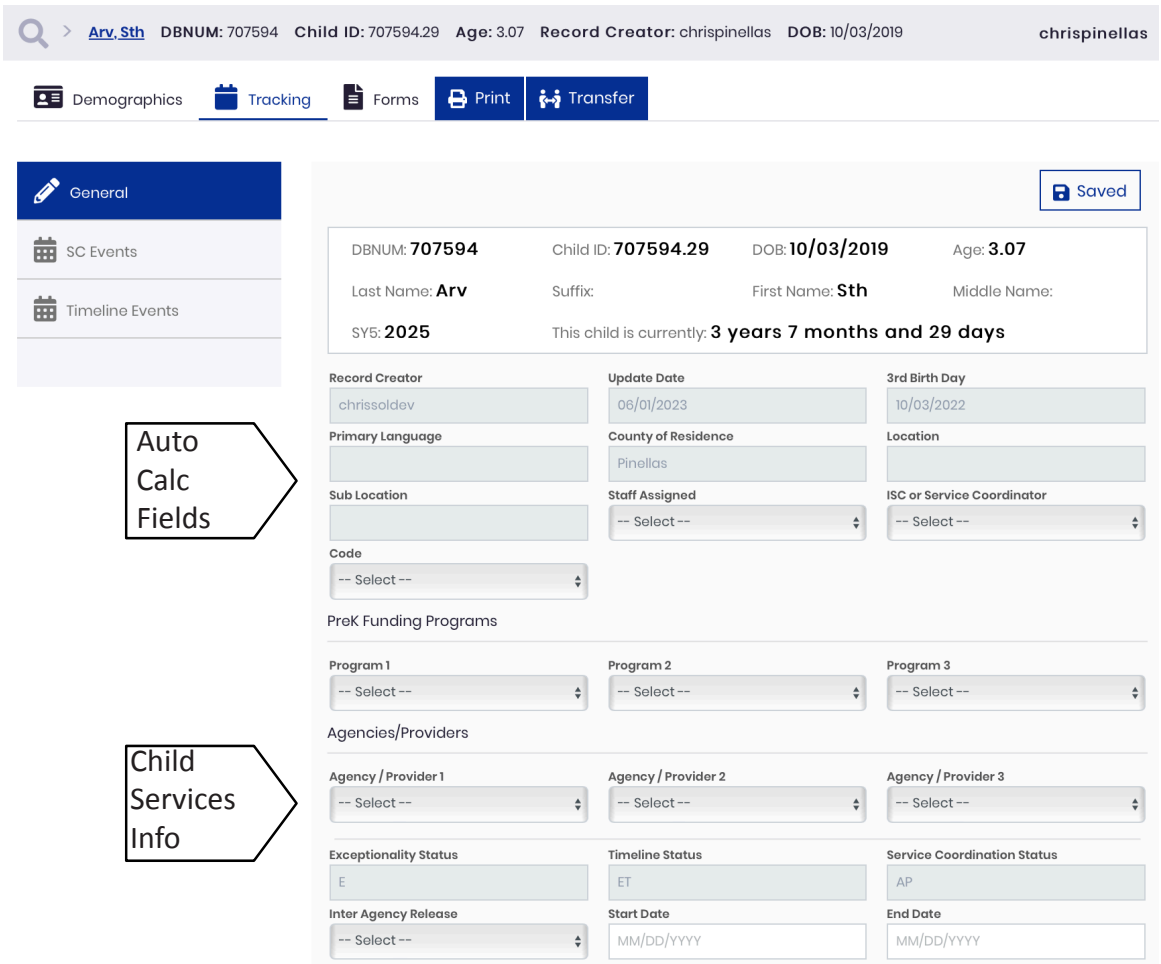
FIGURE 20: Critical Information Section



Tracking Summary

The **General Tracking** screen contains confidential information regarding service provision. (see Figure 21).

FIGURE 21: Tracking Screen



Tracking Screen Detail

Automatically Calculated Fields

The top section of the **Tracking** screen contains child information that is automatically calculated and pulled from the **Demographic** screen. Modifications to these fields must be made in the **Demographic** screen.

NOTE

The Code field in the Child Services Info section of the* Tracking *Screen is a site-specific field and can therefore be individualized for each FDLRS site. The Data Facilitator has full access to modify this drop-down list. Please be sure to develop consistent rules for the use of this field.

Child Services Information

The middle section of the **Tracking** screen contains confidential information regarding service provision.

Exceptionality Status: Indicates the child's status regarding eligibility for an IDEA Part B exceptionality program. This field indicates eligibility for Part B regardless of receipt of exceptional student education (ESE) services. Status field options include the following:

Exceptionality	Description
E	Eligible - Eligible for IDEA Part B exceptionality program. (Primary Exceptionality has been selected within the ESE Eligibility event.)
I	Ineligible - Child has been determined ineligible for Part B services.
N	Not Determined - An Evaluation event exists, but no ESE Eligibility event has been created. Status remains "N" until an ESE Eligibility event is created.

Timeline Status: Indicates the most recent Timeline event in the child's record. Status field options include the following:

Timeline Status	Description
TM	Transition Meeting - A *Transition Date* has been entered.
SR	Screening Requested - A *Referral for Screening Date* has been entered. No detailed screening event information has been entered.
SC	Screening - Detailed screening event information has been entered. No *Final Result Date*.
SF	Screening Final Result - *Screening Final Result Date* was entered.
ER	Evaluation Requested - *Referral Date* has been entered. No detailed evaluation event information.
EV	Evaluation - Detailed evaluation event information has been entered. No *Evaluation Completion Date*.
EF	Evaluation Final - *Evaluation Completion Date* was entered.
ES	ESE Staffing - *ESE Staffing Date* has been entered.
SP	Individual Educational Plan (IEP)/Individualized Family Support Plan (IFSP) *IEP/IFSP Date* has been entered.
ET	End Timeline - *End Timeline Date* has been entered. When Timeline Status is "ET", it will be displayed in red.

Service Coordination Status: Indicates the most recent Service Coordination event in the child's record. Contact Log is the only event that has no effect on this status field.

Service Coordination Status	Description
AP	Appointments
PS	Packet Sent
PR	Packet Returned
PFU	Periodic Follow Up
OH	On Hold
FTE	Folder to District/LEA
RFC	Referral First Contact
RI	Referral In
RO	Referral Out
RIN	Referral Inactive
RC	Referral Closed

Timeline Events

Timeline Events are accessed by clicking on the TIMELINE EVENTS link in the Data Displayed window. The Timeline tracks the number of days elapsed between events. Timelines are entered according to guidelines established by the FDOE. These guidelines are described in the next section of this document.

Service Coordination Events

Service Coordination Events are accessed by clicking on the SC EVENTS link located on the left side of the **Tracking** screen (see Figure 21). Service Coordination events are entered and maintained according to individual site needs.

Event Detail Screens: Timeline and Service Coordination Events

The navigation bar at the top of of the Timeline window will display the number of Timelines contained in each child's record. The number of Service Coordination Events displayed can be chosen by clicking the drop-down at the bottom left of the SC Events screen.

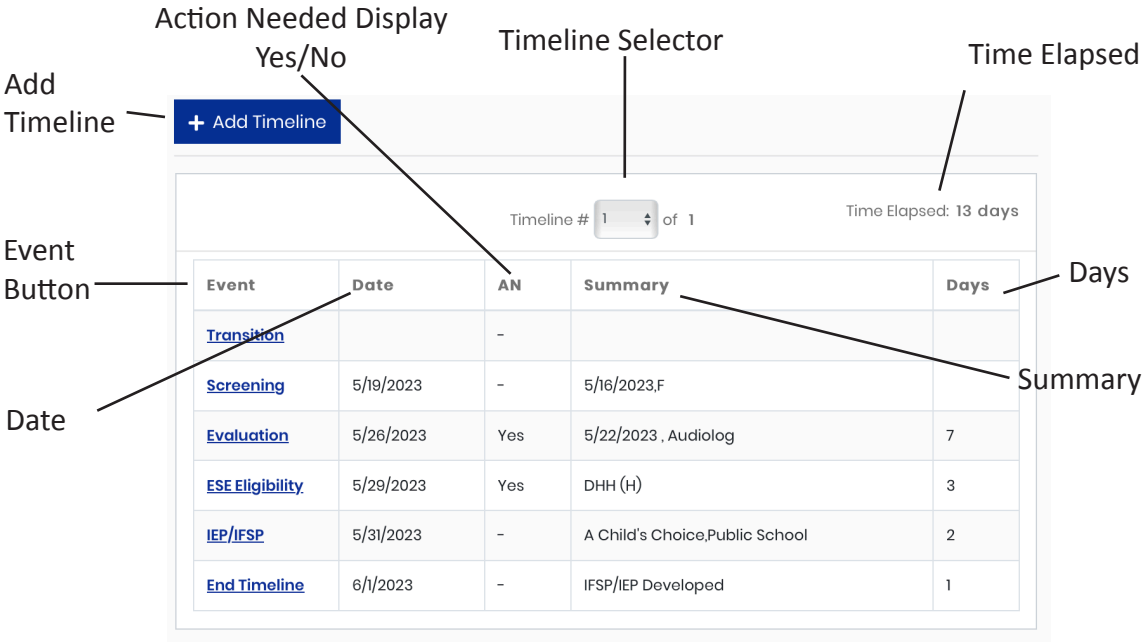
Timeline Events

Timeline Events Section

The Timeline events section is accessed by clicking on the TIMELINE EVENTS link located on the left side of the **Tracking** screen (see Figure 21). A brief description of each button and field is listed below.

- ADD TIMELINE – Adds a new Timeline.
- Timeline Selector – Indicates the total number of Timelines created for the child.
- Time Elapsed – Indicates the total number of days elapsed for the Timeline displayed.
- Event Button – Opens the **Detail** screen for the corresponding event.
- Date – Displays the event date recorded in the **event detail** screen that is most relevant to the Timeline.
- Summary – Displays information recorded in the **event detail** screen in abbreviated text.
- Days – Displays the total number of days lapsed between events.

FIGURE 22: Timeline Event Options



Event	Date	AN	Summary	Days
Transition		-		
Screening	5/19/2023	-	5/16/2023,F	
Evaluation	5/26/2023	Yes	5/22/2023 , Audiolog	7
ESE Eligibility	5/29/2023	Yes	DHH (H)	3
IEP/IFSP	5/31/2023	-	A Child's Choice,Public School	2
End Timeline	6/1/2023	-	IFSP/IEP Developed	1

Timeline Events

Timeline events document the number of days between the Part C to Part B Transition event or the Screening event and the time a child has been appropriately awarded or denied services. There are six Timeline events. Detailed information for the Timeline events is available in the *Field Reference Guide.*

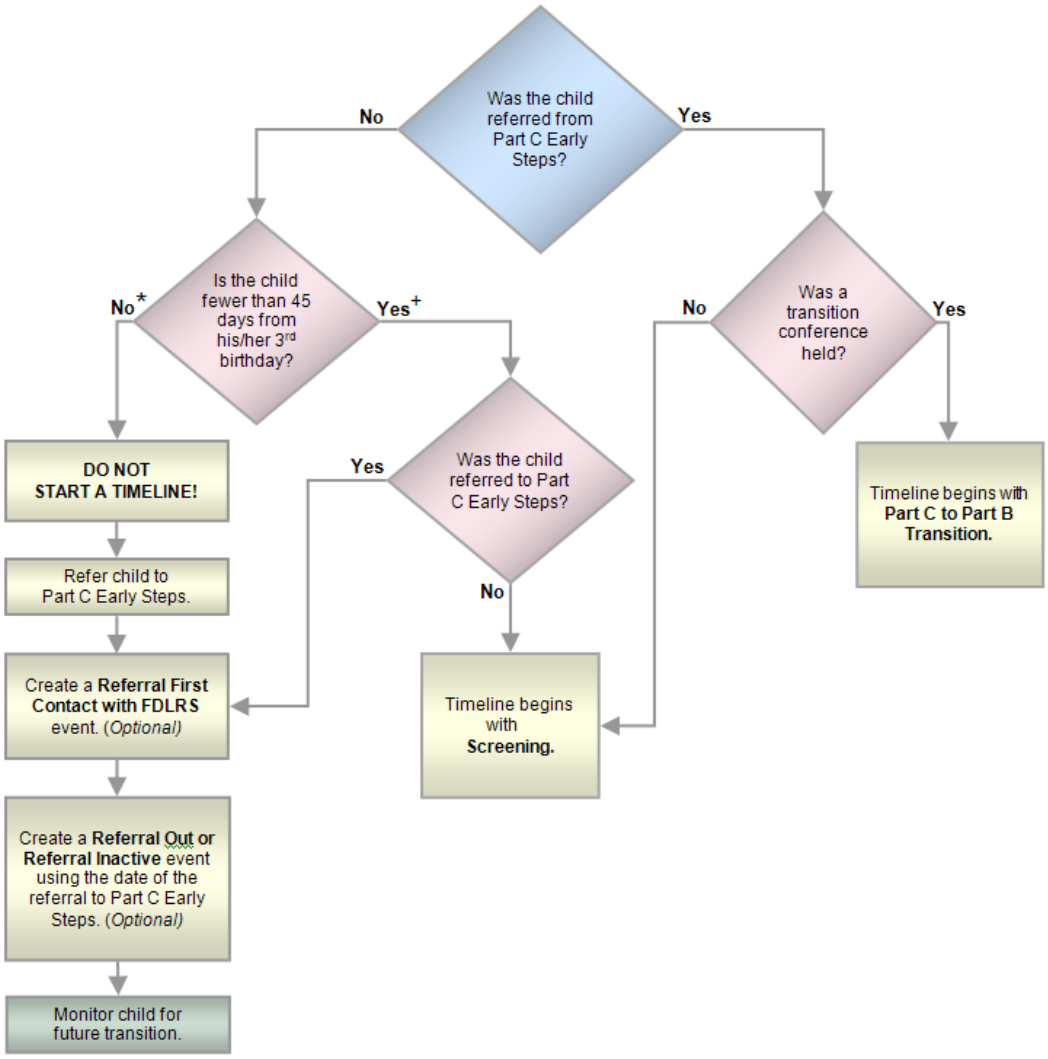
Timeline Event Name	Description
Part C to Part B Transition	Contains information about the transition from Part C to Part B services.
Screening	Contains information about individual screenings, including review of records.
Evaluation	Contains information about formal evaluations, including review of records.
ESE Eligibility	Contains information about ESE eligibility for IDEA Part B services following evaluations.
IEP/IFSP	Contains information about Individual Educational Plans and Individualized Family Support Plans (IEP/IFSP). Also contains information about placements in other programs or services.
End Timeline	Indicates that eligibility determination services for the child have ended.

CHRIS Timeline Guidelines – Rules for Correct Timeline Entry

Timeline activities are focused on the determination of eligibility for Part B services. When a child is being referred for such determination, regardless of the referral source, the Timeline begins either with the Part C to Part B Transition event or the Screening event. Guidelines for determining the appropriate initial event for the Timeline are provided in *Figure 23.*

Timelines may only be initiated with the Part C to Part B Transition or the Screening event.

FIGURE 23: CHRIS Timeline Guidelines



* Children who are more than 45 days from their 3rd birthday **must** be referred to Part C, Early Steps.

\+ Children who are fewer than 45 days from their 3rd birthday **may** be referred to Part C, Early Steps. Early Steps is not required to conduct an initial evaluation and to develop an IFSP for these children. However, Early Steps may choose to complete this process.

Timeline Management

- If, by professional judgment, all service was done that could be done for a child, the Timeline can be ended and the appropriate reason recorded in the event detail. For example, if the child entered kindergarten or had an IEP/IFSP developed, those would be listed as reasons for ending the Timeline.
- If, after a Timeline was closed, a new event occurs that indicates a new Timeline needs to be opened, a new Timeline should be opened.
- A closed Timeline cannot be reopened.
- A Timeline cannot be deleted.

Record Review

Record Review can be used within the Screening and Evaluation events to record Screenings or Evaluations that have taken place prior to referral but that might be appropriate for determining eligibility when opening a new Timeline. If *Record Review* is used, the Screening or Evaluation detail of those records reviewed should be entered on the appropriate **event detail** screen.

Special Timeline Considerations

Children Under 3 Years of Age

Generally, information regarding children younger than 3 years of age should be recorded using Service Coordination events (particularly Referral First Contact, Referral Out, and Contact Log).

Service Coordination events must be used to record information for children younger than 2 years 3 months, regardless of whether they were referred from Part C, Early Steps. Part C guidelines specify 2 years 3 months as the earliest date for the *Part C to Part B Transition Notification Date*. As such, a Timeline cannot be created for a child younger than 2 years 3 months.

Districts may serve birth to 2-year-old children in certain categories. However, in most cases, they are serving them as Part C children, so service coordination would be managed just as any other child served by Part C until their transition for Part B services begins.

If your district serves children who are under age 3 and who are not in transition, but are served as Part B eligible children, pertinent information can be entered into the Timeline. This can only occur during the school year in which the child turns 3 years old. Entering data into the Timeline for a child under age 3 will result in several warning messages. Respond to these warnings appropriately to proceed with data entry. You must determine through the school district ESE department whether these children are being served under Part B and are receiving Free Appropriate Public Education (FAPE).

Children Receiving Part C, Early Steps Services
For children receiving services from Part C, Early Steps, the Timeline can start with the Part C to Part B Transition event. Everything prior to transition should be recorded using Service Coordination events. An exception to this occurs when the child is referred by Part C, Early Steps, without a formal transition conference. In this case, the Timeline would start with the Screening event.

Children Not Receiving Part C, Early Steps Services
Children under 3 years of age who are referred to FDLRS and are not receiving services from Part C, Early Steps, legally must be referred to Part C, Early Steps. If Part C, Early Steps, declines the referral or the parent declines Part C services and the child is 2 years 3 months old or older, a Timeline can be started with a Referral First Contact with FDLRS and the Screening event. The Service Coordination events should reflect a Referral Out to Part C, Early Steps, with a note as to why the child was not processed through Part C.

Part C Children with No Formal Transition Conference
If a child is referred by Part C, Early Steps, and there has been no formal transition conference including a representative from the Local Education Agency (LEA), the Timeline begins with the Screening event. The *Pre-K Funding Program* at the top of the **Tracking** screen should reflect Part C, Early Steps. A note should be included in the Screening event explaining that the child transitioned from Part C, Early Steps, but no information was received about the transition conference or any other relevant information that would explain the absence of the Part C to Part B Transition event (e.g, parent did not attend transition conference). The Part C to Part B Transition event cannot be created in this case because the *Part C to Part B Transition Notification Date* is required to create this event.

Children Referred with Some or All Evaluations Completed
When children are referred with some or all Evaluations completed, the Timeline should begin with the Screening event. The date records are received and reviewed should be recorded in the Record Review Date field. The dates of any prior Screenings conducted that will be used to determine eligibility should be recorded in the appropriate Screening detail fields. The dates of these Screenings will predate the *Referral for Screening Date* in most cases. The *Screening Final Result Date* should reflect the date the review of records and any additional Screenings were completed.

An Evaluation event should be created using the date the decision was made to proceed to the Evaluation step. In the event detail, the same process used in the Screening event detail should be followed to record any information that will be used to determine eligibility that predates the *Referral Date.* Actual Evaluation dates should be recorded for any evaluations completed following the referral. The *Evaluation Completed Date* should reflect the date when all Evaluation information necessary to determine eligibility was gathered.

NOTE ***Dates provided within the event detail can precede the dates of the actual event.***

Children with an Active Individual Educational Plan
If a child has an active IEP, the child has already been placed in a Part B program. All data entry should be done through the Service Coordination events and a new Timeline should not be started. The Referral First Contact and Referral In events should be used for follow-up on these children once they have entered the school system.

Re-Screening
Only one Screening event can be entered per Timeline. Detailed information for Re-screenings should be entered in the detail of the Screening event or in an appropriate Service Coordination event. Depending on the circumstances, Re-screenings for an individual child could be tracked using the *Record Review* option in the Screening event or one of the referral events in Service Coordination. When using the *Record Review* option, the date of the *Record Review* should be entered and the detailed information about the Screenings should be entered in the *Notes* field. If a Re-screening has occurred during the current Screening event, enter the last incidence of Screening and the *Screening Final Result Date* in the event detail. Enter information regarding preceding Screenings in the *Notes* field.

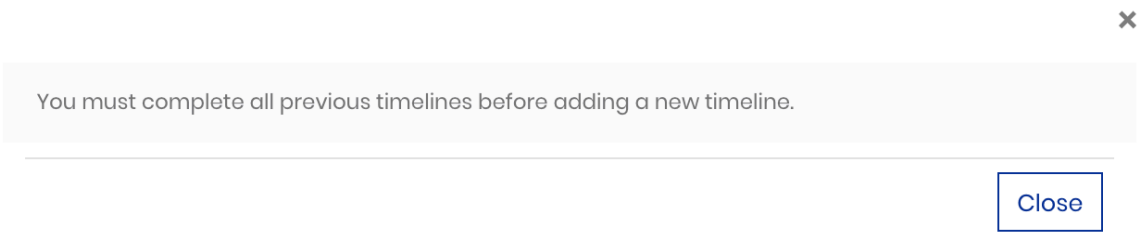
Delays in Obtaining Information
The Timeline should not be ended prematurely because of a delay in obtaining information. **The Timeline should be kept open as long as there is something still happening with the child.** For example, if the date of the support plan is not known, the Timeline should remain open until that information is obtained. The Timeline is calculated based on the date of the support plan, not the date the information was received, so there is no harm in waiting to end the Timeline when all information for the support plan event has been obtained. Service Coordination implies follow-up on children to determine the status of the referral until the child is receiving services.

Errors on the Timeline
A Timeline cannot be deleted; however, data elements within the Timeline can be corrected. There are numerous checks in the system to prevent the inadvertent creation of a Timeline, and it is not possible to enter events out of order.

Active Timelines

A Timeline that does not include a completed End Timeline event is considered active. Active Timelines must be completed before a new Timeline can be created. If a user attempts to add a new Timeline while another Timeline is active, the following message will be displayed (see Figure 24):

FIGURE 24: Active Timeline Message



Timeline Order

The most recent Timeline will be displayed at the top in the **Timeline Events** screen. Use the Timeline Selector (see Figure 22) to view other Timelines.

Timeline events cannot be entered out of order. Events must be completed consecutively, beginning with a Part C to Part B Transition event or Screening event and ending at any time with an End Timeline event. For example, if an Evaluation or IEP/IFSP event has not been entered, an End Timeline event can be completed with an appropriate reason.

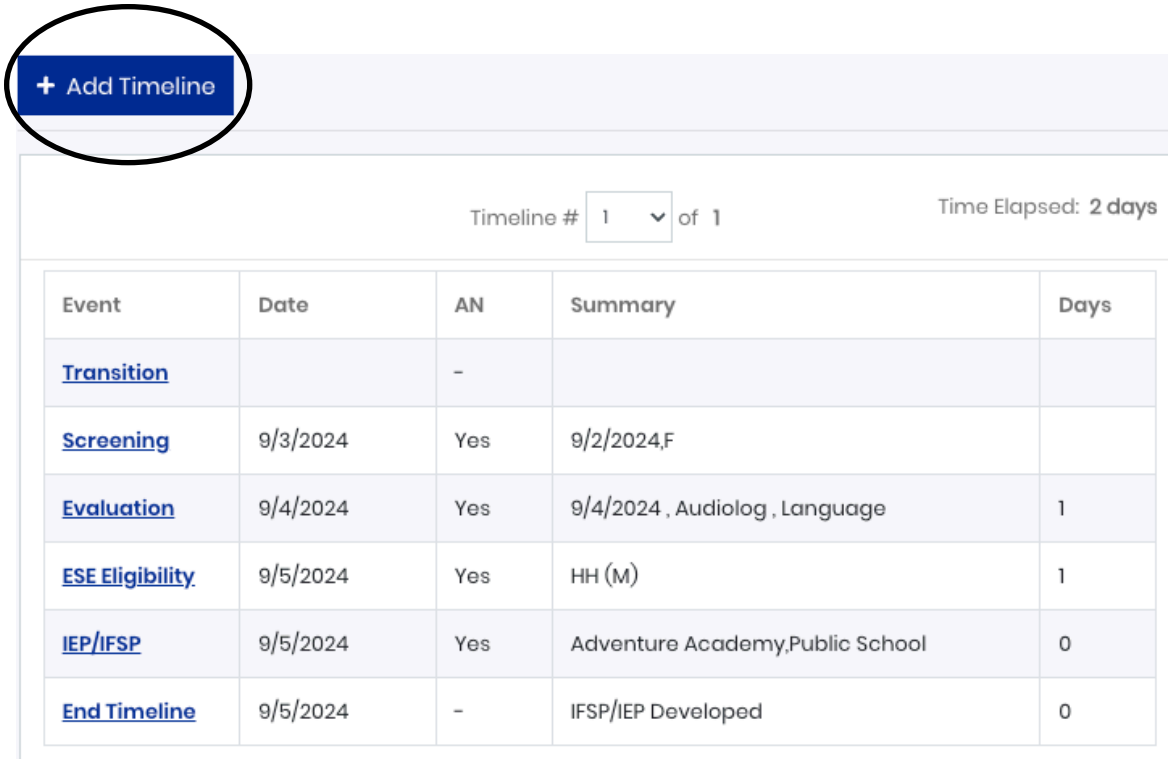
Add a Timeline

To add a Timeline, complete the following steps:

1. Check the Timeline Guidelines (see Figure 23) to confirm that the child's situation meets the criteria for creating a new Timeline.

2. Click the ADD TIMELINE button located in the **Timeline Events** screen. (see Figure 25).

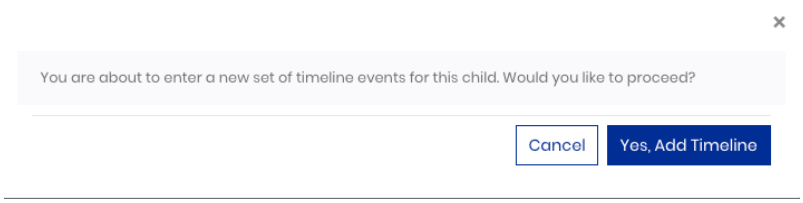
FIGURE 25: Timeline Events Section



Event	Date	AN	Summary	Days
Transition		-		
Screening	9/3/2024	Yes	9/2/2024,F	
Evaluation	9/4/2024	Yes	9/4/2024 , Audiolog , Language	1
ESE Eligibility	9/5/2024	Yes	HH (M)	1
IEP/IFSP	9/5/2024	Yes	Adventure Academy,Public School	0
End Timeline	9/5/2024	-	IFSP/IEP Developed	0

3. The New Timeline message will be displayed (see Figure 26). Click the YES, ADD TIMELINE button to add a new Timeline to the child's record.

FIGURE 26: New Timeline Message



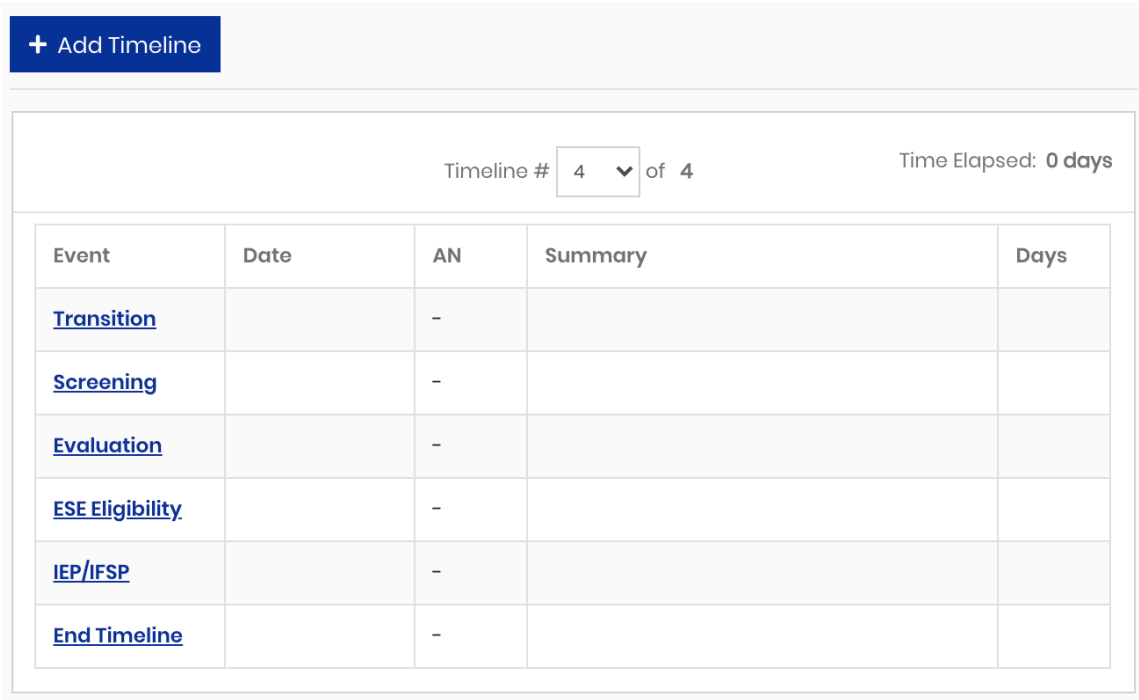
4. A blank Timeline will be displayed (see Figure 27). By default, each of the following events will be displayed: Transition, Screening, Evaluation, ESE Eligibility, IEP/IFSP, and End Timeline.

5. Click an event name to open the **event detail** screen to begin data entry.

6. Once in an **event detail** screen use icons **Next** and **Prev** to navigate to the next or previous Timeline Event.

Timelines may only be initiated with the Part C to Part B Transition or the Screening event.

FIGURE 27: Blank Timeline



Exercise 5: Add a Timeline

1. Select the RECORD LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Aue
   First Name: Jake
   From: 02/08/2022
3. Click the SEARCH button.
4. Find Jake and click the TRACK button.
5. Click the Timeline Events button.
6. Click the ADD NEW TIMELINE button.
7. Click Yes, Add Timeline button.
8. Click the SCREENING button to open the event detail screen to begin data entry.
9. Enter the following information:
   Presenting Problem (Primary): Hearing Concerns
   Referral for Screening Date: 11/12/2024
   Date of Final Result: 11/13/2024
10. Click the BACK TO TIMELINE link at the top of the screen.
11. Click the EVALUATION button.
12. Click the Continue to Evaluation event button.
13. Enter the following information:
    Presenting Problems (Primary): Hearing Concerns
    Referral Date: 11/14/2024
14. Click the BACK TO TIMELINE link at the top of the screen.
15. Click the ADD TIMELINE button (click "X" to close message).
16. Click the END TIMELINE button.
17. Enter the following information:
    End Timeline Date: 11/15/2024
    End Timeline Reason: Unable to locate child
18. Click the BACK TO TIMELINE link at the top of the screen.
19. Click the ADD TIMELINE button.
20. Click Yes, Add Timeline button.
21. A blank Timeline will be displayed.

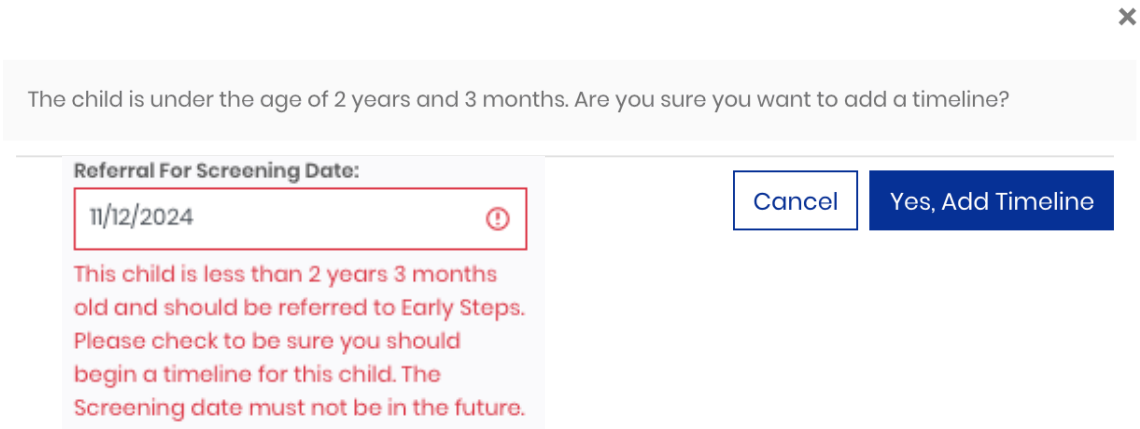
Timeline Data Entry

When attempting to add a Timeline or as data are entered in Timeline events a warning or reminder message may appear. These messages are included to guide users on when to add a Timeline or how to enter information in the **event detail** screens and to enforce the Timeline Guidelines.

Child's Age

A Timeline should not be created for children younger than 2 years 3 months old. When a timeline is created or when either the Part C to Part B Transition or Screening event is created, the CHRIS program automatically checks that the associated *Part C to Part B Transition Notification Date or Referral for Screening Date* entered is at least 2 years 3 months greater than the child's *Date of Birth*. If the date entered is less than 2 years 3 months, CHRIS will generate a warning message (see Figure 28).

FIGURE 28: Timeline Warning Message



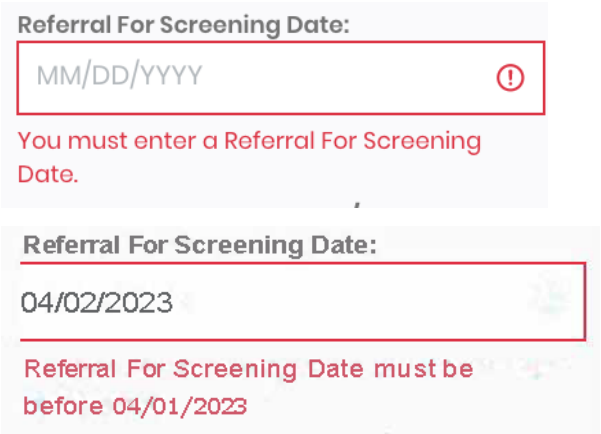
Options

- Yes Add Timeline – (default) Allows the Part C to Part B Transition or Screening event to be added to the Timeline. Contact with Early Steps must be made if the child is younger than 2 years 3 months old.
- Cancel – Returns to the **Timeline Events** screen and does not create the Timeline.

Event Date

All Timeline events must contain an event date. An event date field cannot be left blank and should not have a date that is more than one year from the current date. The field in question will turn red and a warning will appear below (see Figure 29).

FIGURE 29: Timeline Warning Message

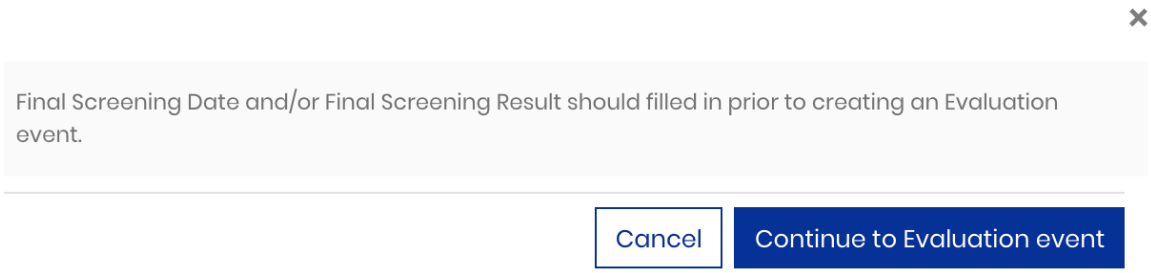


Entering dates that are more than one year from the current date may cause data entry issues. The Timeline warning message will continue to appear even if additional information has been entered into the event. Check that the event dates entered are correct.

Event Order

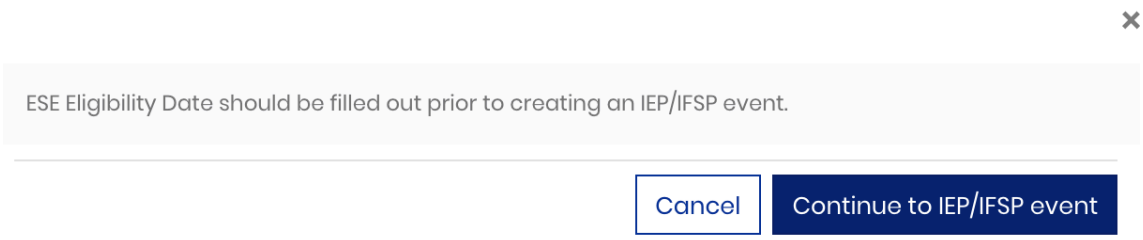
A Timeline may only begin with the Part C to Part B Transition or Screening event. In addition, all Timeline events must be entered in the order in which they appear. For example, if the Timeline began with the Part C to Part B Transition event, the next event to be entered is the Screening event. If a user attempts to enter an Evaluation event (or any other Timeline event), a Timeline warning message will be displayed (see Figure 30).

FIGURE 30: Timeline Warning Message



If the next event has not yet been created, a Timeline warning message will be displayed (see Figure 31) with the name of the next Timeline event.

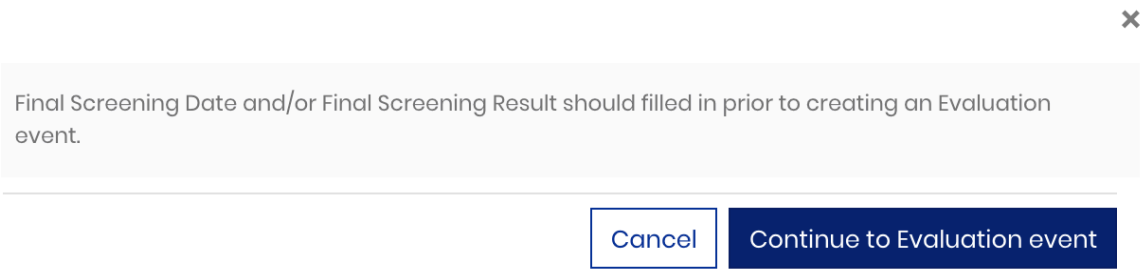
FIGURE 31: Timeline Warning Message



Event Completion

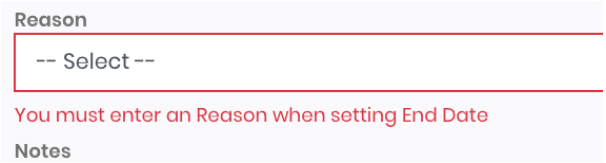
Timeline events must contain an event date before creating the next event. If the currently displayed Timeline event does not have an event date entered, a Timeline warning message will be displayed when attempting to access the next event (see Figure 32).

FIGURE 32: Timeline Warning Message



An *End Timeline Reason* is required to complete the End Timeline event and the entire Timeline. If a reason is not specified, a warning message will be displayed (see Figure 33). The *End Timeline Reason* field is a state-defined list that cannot be modified by the data facilitator.

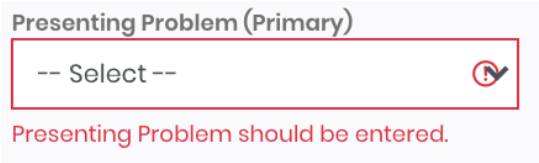
FIGURE 33: Timeline Warning Message



Presenting Problem

Presenting Problem (Primary) is an important data entry field for the Screening and Evaluation events. CHRIS will automatically detect when a *Presenting Problem* value has not been selected from the drop-down list and will respond by turning the field red and displaying a warning message. (see Figure 34).

FIGURE 34: Timeline Reminder Message

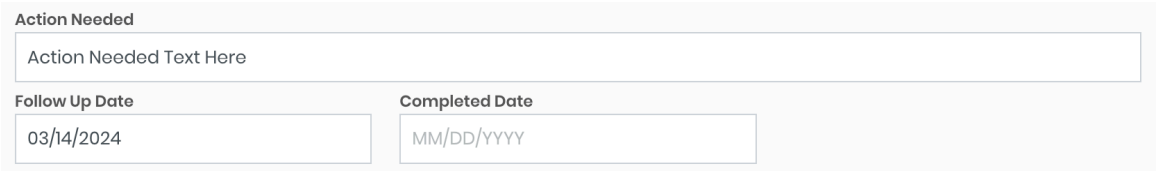


If available, enter a value in the *Presenting Problems (Primary)* field to deactivate this message.

Action Needed

The Action Needed feature is a customizable tool that is available in every Timeline and Service Coordination event in CHRIS. *Action Needed* fields allow the case manager to describe the future actions that need to be taken and designate a *Follow-Up Date.* Once the action is completed, the case manager can enter the *Completed Date* (see Figure 35).

FIGURE 35: Action Needed Example



Reports can be generated using any of the Action Needed fields (see Figure 36). These reports can also be used to organize and manage the activities and staff assignments required to meet the needs of the children being served. For example, a report based on a given staff member generates a list of all children assigned to the staff member and all the Action Neededs that are associated with those particular children.

FIGURE 36: Action Needed Report

FDLRS/Gulfcoast Associate Center
2929 County Road 193
Clearwater FL 33759
Report Date: 03/01/21
Report Time: 8:05:27 AM

Action Needed Report

Dbnum	Name (Last, First)	DOB	Age Now	Age At Screen	Action Needed	Follow-Up Date Code	Date Completed TM St	SC St	Staff Assigned SubLocat	Agencies/Providers Part C Serv Coord
552401	eio ,Kin	02/13/16	5.00	4.09	Testing	09/22/20 Jessica Rey	SP	AP	Sabal Palms Julie Restle	The Sprout ADAPT South
552401	eio ,Kin	02/13/16	5.00	4.09	werwew	09/23/20 Jessica Rey	09/25/20 SP	AP	Sabal Palms Julie Restle	The Sprout ADAPT South
552401	eio ,Kin	02/13/16	5.00	4.09	23sdws	09/24/20 Jessica Rey	SP	AP	Sabal Palms Julie Restle	The Sprout ADAPT South
552401	eio ,Kin	02/13/16	5.00	4.09	aaswee	09/26/20 Jessica Rey	SP	AP	Sabal Palms Julie Restle	The Sprout ADAPT South
552401	eio ,Kin	02/13/16	5.00	4.09	wert	10/02/20 Jessica Rey	SP	AP	Sabal Palms Julie Restle	The Sprout ADAPT South

Total Number Of Children 5

Exercise 6: Timeline data entry

1. Select the RECORD LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Aue
   First Name: Jake
   DOB: 02/08/2022
3. Click the SEARCH button.
4. Find Jake and click the TRACK button.
5. Click the TIMELINE EVENTS link and select the SCREENING button.
6. Enter the following information:
   Referral for Screening Date: 11/12/2024
7. Notice the red fields and messages below.
8. Enter the following information:
   Date of Final Result: 11/13/2024
9. Note the *Final Screening Result* is highlighted in red.
10. Enter the following information:
    Screening Final Result: F
11. Note that Presenting Problem (Primary) is now red.
12. Enter the following information:
    Presenting Problems (Primary): Hearing
13. Use the **Next** link twice to navigate to the ESE Eligibility event. (Close message)
14. Click the BACK TO TIMELINE link.
15. Click the END TIMELINE button.
16. Enter the following information:
    End Timeline Date: 11/15/2024
17. Click the BACK TO TIMELINE link. (see message).
18. Click the CANCEL button.
19. Enter the following information:
    Reason: Unable to locate child
20. Click the BACK TO TIMELINE link..
21. Click the ADD TIMELINE button.
22. Click the
23. A blank Timeline will be displayed.

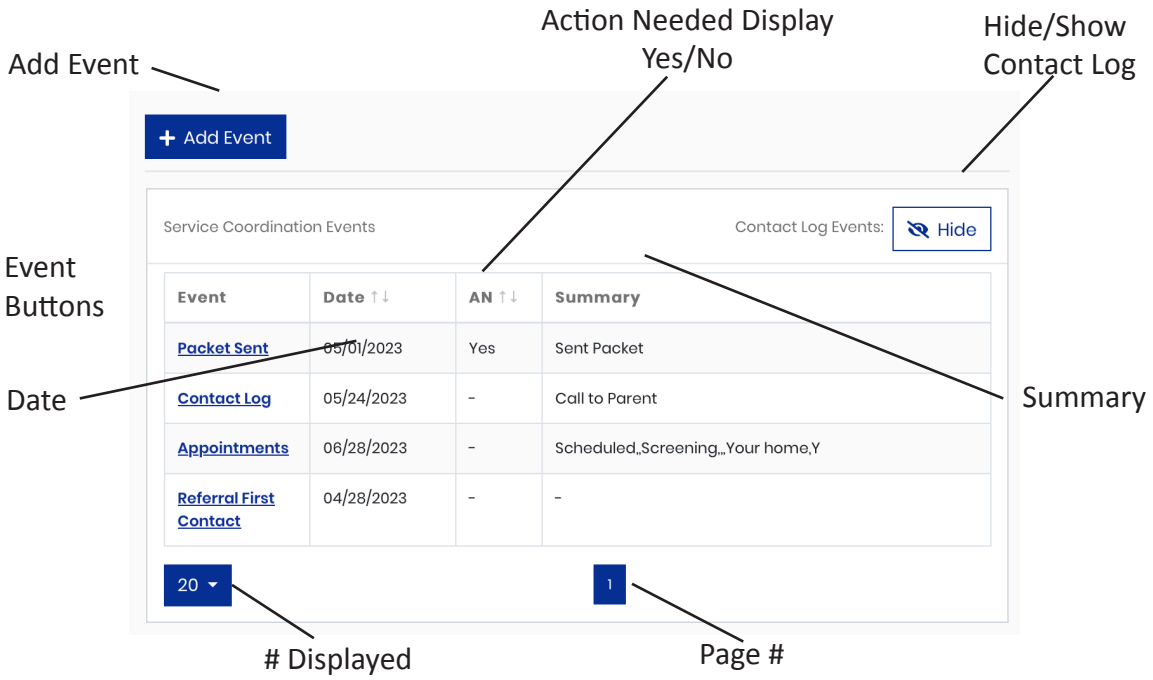
Service Coordination

SC Events Summary

The SC Events Section (see Figure 37) is accessed by clicking the SC EVENTS link from the **Tracking** screen (see Figure 21). A brief description of each button and field is listed below:

- ADD EVENT – Opens the **Add New Service Coordination Event** screen (see Figure 38).
- Hide/Show Contact Log – Displays or hides the Contact Log events.
- Event Buttons – Open the **detail** screen for that event.
- Date – Displays the event date recorded in the **event detail** screen.
- # Displayed (Events) – Adjusts number of Service Coordination events that are displayed.
- Summary – Displays information recorded in the **event detail** screen in abbreviated text.
- Page # – Direct links to the individual pages of Service Coordination events.

FIGURE 37: SC Events Section



Service Coordination Events

Twelve events are available for use by Child Find specialists to track Service Coordination information in CHRIS. They represent significant points in case management. Detailed information for the Service Coordination events is available from the *Field Reference Guide.*

Event Name	Description
Referral First Contact	Contains information about a child when the child is first referred with a presenting problem or concern. This event can only occur once.
Referral In	Contains referral information for a child when a Referral First Contact event has already been recorded.
Appointments	Contains information regarding appointments made with the family on behalf of the child.
Contact Log	Contains a record of communication between the parties involved and the service coordinator regarding the child's record.
Packet Sent	Contains information regarding packets sent to the parent in response to a referral or request.
Packet Returned	Contains the date of response and additional comments regarding information requested from a child's family.
Referral Out	Contains information about referrals made to other agencies.
Periodic Follow-Up	Contains information regarding future follow-up, such as a Part C child that will need follow-up for transition.
On Hold	Contains information on temporary situations that create a delay in the identification process, such as waiting for records, evaluations, or parent or provider response.
Folder to District/LEA	Contains information about when the Child Find process was completed and the child was referred to the school system.
Referral Inactive	Contains information about the point at which no further action is required on the part of Child Find, such as when the child entered kindergarten.
Referral Closed	Contains information regarding closing the child's record. It is expected that the child will not be referred back to FDLRS/Child Find for services.

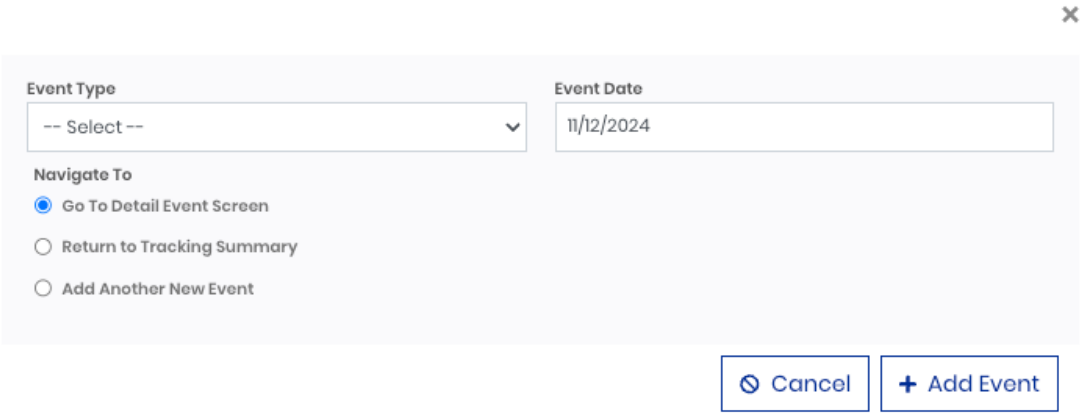
Add Service Coordination Events

To add a Service Coordination event, complete the following steps:

1. Search for a record using the **Record Locator** screen then click the TRACK button (see Figure 8) to select a child.

2. Select the SC EVENTS link from the Data Displayed window (see Figure 13) and then click the ADD EVENT button. The **Add Service Coordination Events** screen will be displayed (see Figure 38).

FIGURE 38: Add Service Coordination Events Screen



3. Choose an event from the drop-down list. The following events are available:
   - Referral In
   - Appointments
   - Contact Log
   - Packet Sent
   - Packet Returned
   - Referral Out
   - Periodic Follow-Up
   - On Hold
   - Folder to District/LEA
   - Referral Inactive
   - Referral Closed

4. Enter the date the event occurred in the Event Date field.

5. Choose one of the following options by clicking the corresponding button:

   - RETURN TO TRACKING SUMMARY– Returns to the **SC Events** screen. This option will create the event without entering the **event detail** screen.
   - GO TO DETAIL EVENT SCREEN – Opens the corresponding **event detail** screen. Additional information can be entered.
   - CANCEL – Returns to the **Tracking** screen. All data entered will be cleared and the event will not be added.
   - ADD ANOTHER NEW EVENT – Creates an additional event. This option creates the current event and allows the user to create an additional event.

6. Click "+ Add Event" button.

NOTE

Newly added events will appear on the* SC Events *screen.

Deletion of Events

Service Coordination events can be deleted with the exception of Referral First Contact, which cannot be deleted.

All deletions of Service Coordination events are permanent.

Guidelines

The following are general guidelines for entering Service Coordination events on the **Tracking** screen:

- Events may occur more than once for a child with the exception of Referral First Contact. The sequence of events will vary from child to child.
- Events should be entered in the sequence in which they occurred. However, information may be received on an event at a later time and may need to be entered out of sequence.
- Every effort should be made to enter as much information as possible for all events.

Exercise 7: Add a Service Coordination event

1. Select the RECORD LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Aue
   First Name: Jake
   FROM: 02/08/2022
3. Click the SEARCH button.
4. Click the TRACK button.
5. Select the SC EVENTS link from the **Track** screen.
6. Click the ADD EVENT button.
7. Enter the following information:
   Event: Referral In
   Event Date: 11/12/2024
8. Select the GO TO DETAIL EVENT SCREEN option.
9. Click the ADD EVENT button.
10. Click the BACK TO SC EVENTS link.
11. Click the ADD EVENT button.
12. Enter the following information:
    Event: Contact Log
    Event Date: 11/14/2024
13. Select the ADD ANOTHER NEW EVENT option.
14. Click the ADD EVENT button.
15. Enter the following information:
    Event: Appointments
    Event Date: 12/20/2024
16. Select RETURN TO TRACKING SUMMARY option.

Advanced Search Options

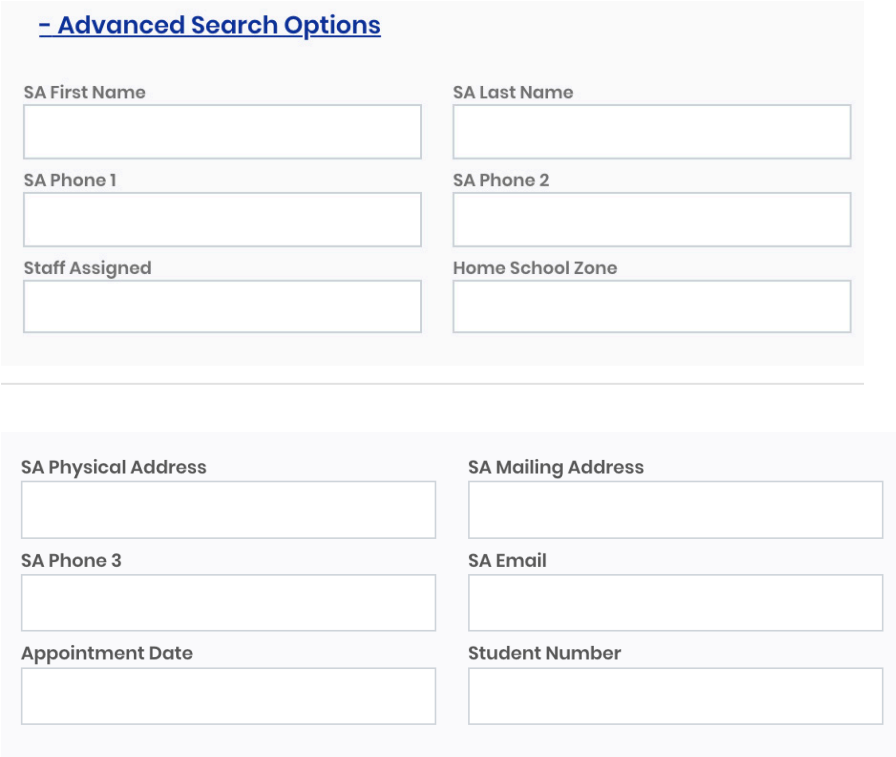
The **Advanced Search Options** screen is used to perform a search on children's records. It is available on the **Record Locator** Screen. Enter the **Advanced Search Options** screen by clicking the link below the RECORD LOCATOR fields.

Available Fields

In addition to the four RECORD LOCATOR fields, there are 12 fields available. Search criteria can be entered for multiple fields to create a more specific find (see Figure 39). Click SEARCH to perform the find. The fields are as follows:

Significant Adult First Name
Significant Adult Last Name
Significant Adult Physical Address
Significant Adult Mailing Address
Significant Adult Phone 1
Significant Adult Phone 2
Significant Adult Phone 3
Significant Adult Email
Staff Assigned
Home School Zone
Appointment Date
Student Number

FIGURE 39: Advanced Search Options



Find Operators

Use any of the find operators below to improve the search criteria for records.

To find values that are:	Use this operator:	Find example:
Less than the value of the item	<	<40 or <09/09/2022
Greater than the value of the item	>	>10/10/2022
Some or all of a field's contents	=	=Ann (finds Ann or Ann Marie but not Annie)
An exact match of the field's contents	==	==Anne (finds Anne but not Ann Marie or Annie)
Within the range specified	...	12:30...17:30
Duplicate values	!	!Ann (finds Ann or Annie or Annette)
Today's date	//	//
Invalid dates or times	?	?
Zero or more unknown or variable text characters	*	*Anne* (finds Anne or Annette or Brianne)
Literal text (including spaces and punctuation) in a field (text exactly as it appears, but regardless of uppercase or lowercase)	""	"Jean-Louis"
Empty fields	=	=
Any one character	@	@f
Any one digit	#	#6

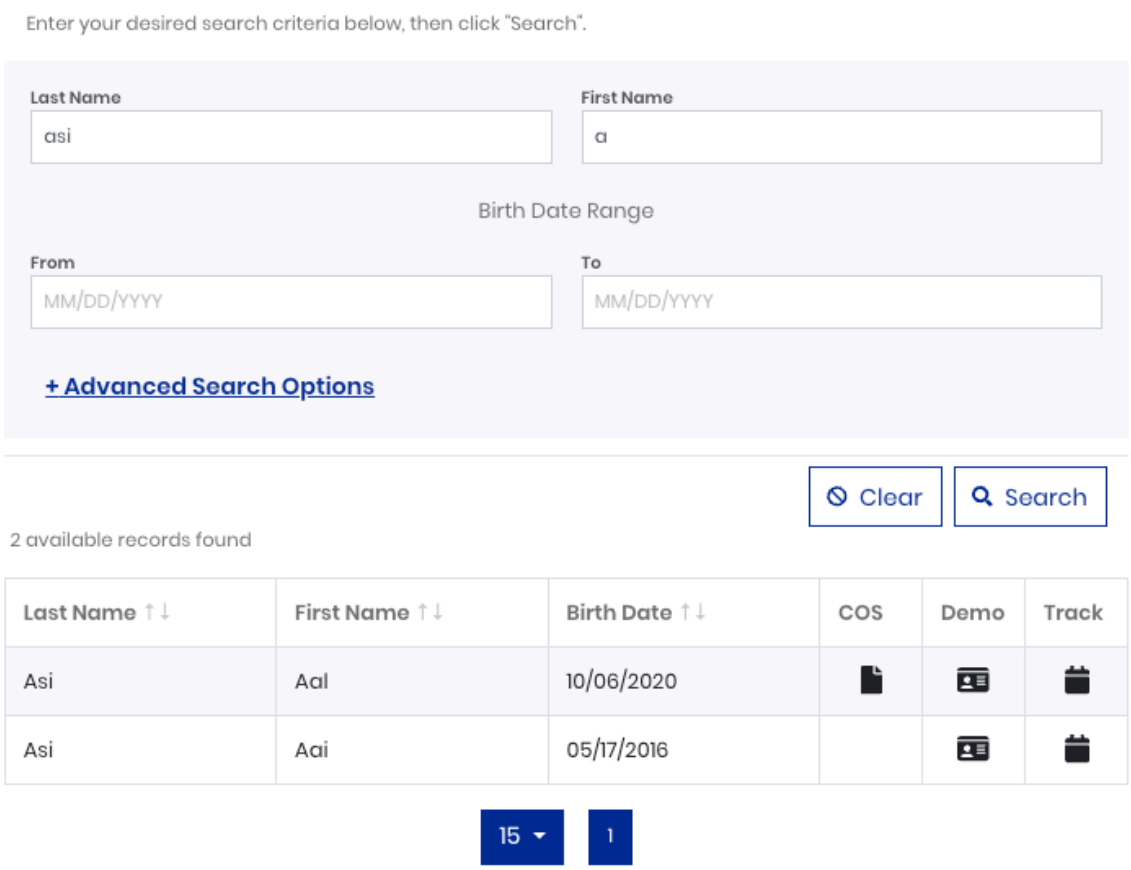
Locator Junior

The **Locator Junior** screen is accessed by clicking the magnifying glass icon at the top left of the **Demographics** or **Tracking** screen (see Figure 14 or Figure 21). It is used to maintain or find a set of accessible records within the CHRIS program (see Figure 40). The **Locator Junior** screen is similar to the **Record Locator** screen except there is no DBNum field (all other fields are available) and the Locator Junior screen will only return results from the current user's center/site (depending on access level). The **Locator Junior** screen displays the *Last Name, First Name and Birth Date* fields for each record. The column titles are buttons that can be clicked on to sort records in ascending (A–Z) or descending (Z–A) order.

NOTE

From the* Locator Junior *screen, click the DEMO* *or TRACK* *buttons to continue with data entry.

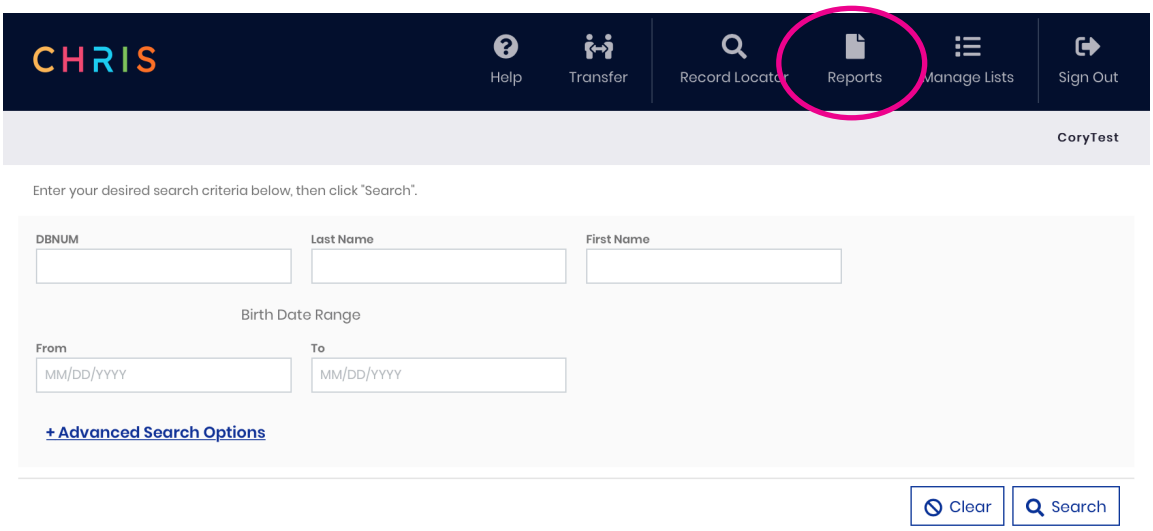
FIGURE 40: Locator Junior Screen



Reports in CHRIS

The CHRIS software program contains a variety of standard and custom reports to assist users in running commonly used reports. To access the reporting features in the CHRIS program, click the REPORTS button from the CHRIS main menu (see Figure 41).

FIGURE 41: Record Locator Screen

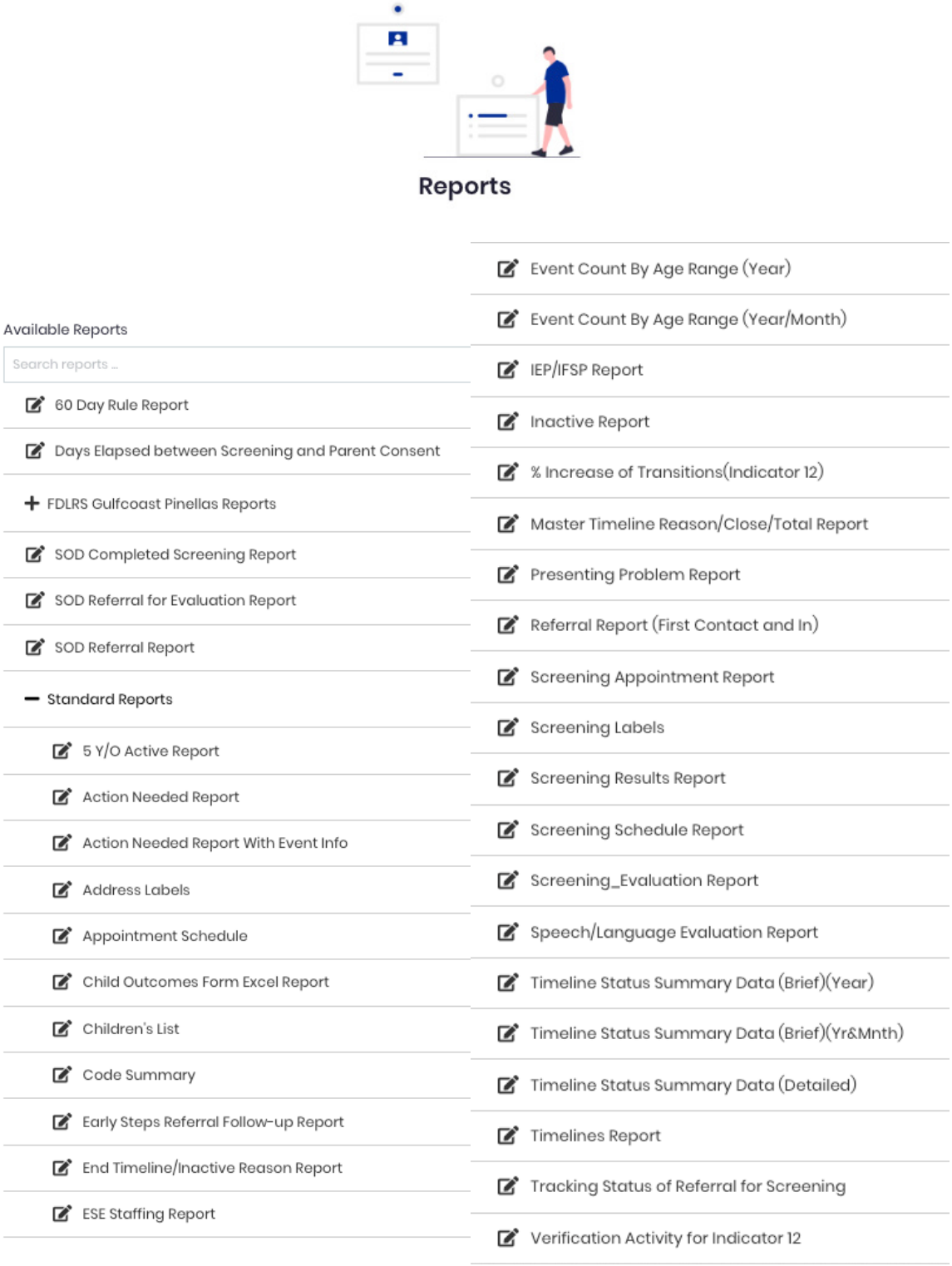


NOTE

The REPORTS button is located on the CHRIS main menu and allows access to the* Reporting *screen. Reports can be accessed from any screen in CHRIS. This screen provides access to a number of standard reports that have been created for the CHRIS program. In addition to these pre-made reports, the* Reporting *screen provides access to custom reports as well.

The **Reports** screen displays all of the report options for the current user (see Figure 42).

FIGURE 42: Reports Screen



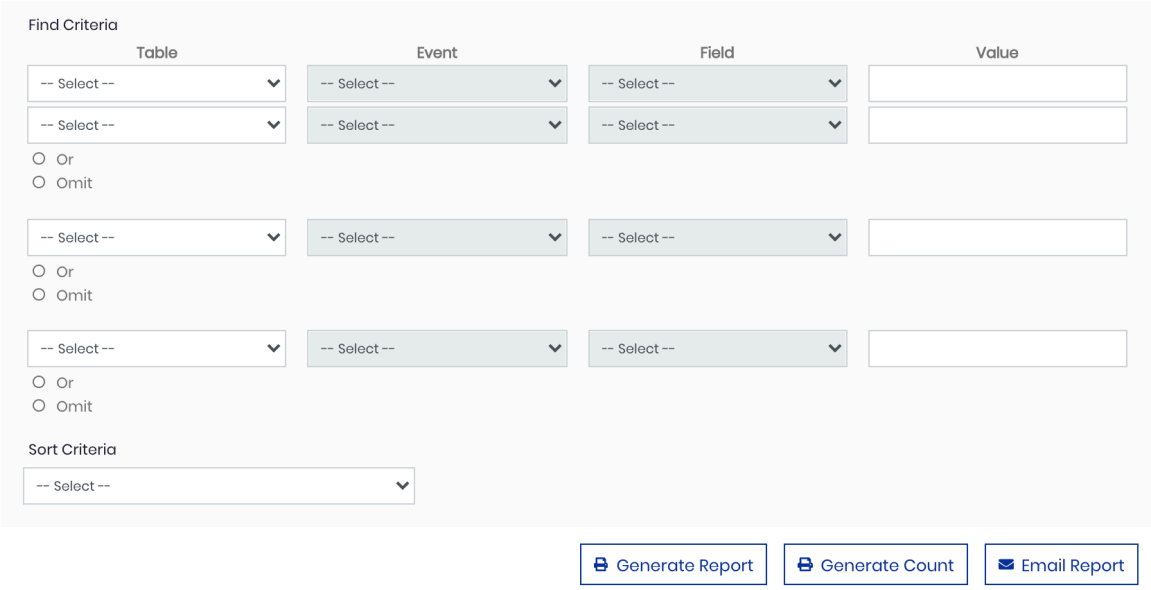
Options

- DAYS ELAPSED BETWEEN SCREENING AND PARENT CONSENT – Shows Days Elapsed between Final Screening Date and Parent Consent for Evaluation Date (Not Counting Weekends). This report displays data in chart form and numerically.
- 60 DAY RULE REPORT – Shows Days Elapsed between Parent Consent for Evaluation and Evaluation Completion Date (Not Counting Weekends). This report displays data in chart form and numerically.
- 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).
- STANDARD REPORTS – Standard reports that are available to all users statewide.
- USER'S SITE REPORTS – Custom created reports for each individual site (will vary depending on access levels).

Reports Find Screen

Selecting an item from the **Reports** screen (see Figure 42) will display the **Reports Find** screen (see Figure 43). The **Reports Find** screen is used to select the data needed to create standard and custom reports for the CHRIS database.

FIGURE 43: Reports Find Screen

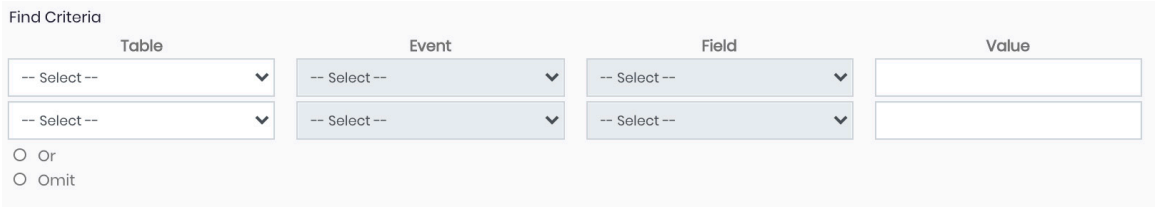


Report Generation Options

- GENERATE REPORT – Creates the report based on find criteria and automatically downloads a PDF to the user's Download folder on the local computer.
- GENERATE COUNT – Displays total records found based on find criteria.
- EMAIL REPORT – Generates a URL link to a PDF copy of the report and automatically sends this link to the email address provided by the user.

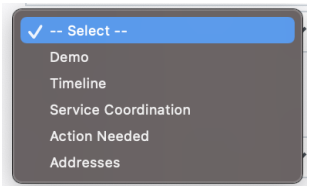
Each section of the **Reports Find** screen allows users to enter search criteria that will be used to find data related to the desired report (see Figure 44).

FIGURE 44: Reports Find Screen Section



The *Table* field allows users to select the source of data needed. Select the table from the drop-down list (see Figure 45).

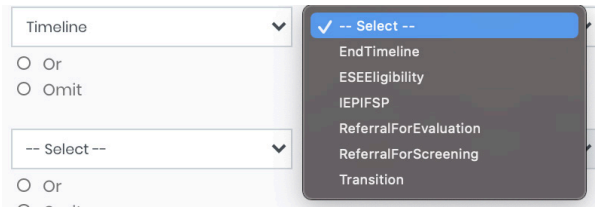
FIGURE 45: Reports Find Screen Table Field



If demographic information is part of the find, Demo should be selected as the Table in the first section of the* Reports Find *screen. The first row of the find criteria forces the user to select the most appropriate table for the report being generated.

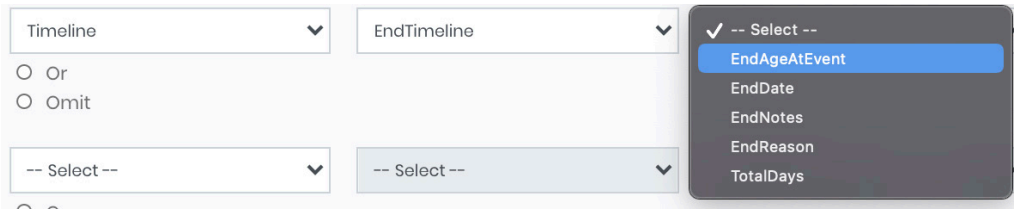
If either Timeline or Service Coordination is selected as the table, the Event field will automatically display a list of the events pertaining to the table chosen (see Figure 46). The appropriate event should be selected from the drop-down list. If Demo, Action Needed, or Addresses is selected as the table, the Event field is bypassed.

FIGURE 46: Reports Find Screen Event Field



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 47). The appropriate field should be selected from the drop-down list.

FIGURE 47: Reports Find Screen Field Field

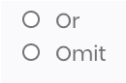


The find criteria are entered into the *Value* field (see Figure 48). For example, a date range would be entered as 01/01/2019...03/31/2019.

FIGURE 48: Reports Find Screen Value Field

To execute the find, click the Generate Report, Generate Count, or Email Report button on the bottom of the screen (see Figure 43).

FIGURE 49: Reports Find Options



The **Reports Find** screen (see Figure 43) contains the following options for performing complex finds (see Figure 49):

- 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.

Standard Reports

Print Address Labels

Standard Reports can be used to create commonly used reports (see Figure 50) including address labels using Significant Adult data (see Figure 51).

FIGURE 50: Standard Reports

FIGURE 51: Address Label Report

To The Parents Of: Aal Aa 1234 Disney Way Miami, FL 33176	To The Parents Of: Hh Aa 1234 Disney Way Miami, FL 33186	To The Parents Of: Tiq Aa 1234 Disney Way Miami, FL 33125
To The Parents Of: Aew Aa 1234 Disney Way Miami, FL 33142	To The Parents Of: Ia Aa 1234 Disney Way Miami, FL 33155	To The Parents Of: Sge Aac 1234 Disney Way Miami, FL 33138
To The Parents Of: Any Aa 1234 Disney Way Hialeah, FL 33015	To The Parents Of: Ja Aa 1234 Disney Way Miami, FL 33130	To The Parents Of: Dja Aad 1234 Disney Way Miami, FL 33143
To The Parents Of: Bn Aa 1234 Disney Way Miami, FL 33193	To The Parents Of: Jn Aa 1234 Disney Way Miami, FL 33186	To The Parents Of: Kin Aad 1234 Disney Way Miami, FL 33145
To The Parents Of: Ca Aa 1234 Disney Way Miami, FL	To The Parents Of: Kie Aa 1234 Disney Way Pensacola City, FL 33033	To The Parents Of: Odo Aad 1234 Disney Way North Miami Beach, FL 33181
To The Parents Of: De Aa 1234 Disney Way Miami, FL 33155	To The Parents Of: Kn Aa 1234 Disney Way Miami, FL 33186	To The Parents Of: Ran Aad 1234 Disney Way Miami, FL 33126
To The Parents Of: Dl Aa 1234 Disney Way Miami, FL 33183	To The Parents Of: Kn Aa 1234 Disney Way Miami, FL 33165	To The Parents Of: Aam Aai 1234 Disney Way Homestead, FL 33033
To The Parents Of: Do Aa 1234 Disney Way Miami, FL 33175	To The Parents Of: Ns Aa 1234 Disney Way Coral Gables, FL 33156	To The Parents Of: Dna Aal 1234 Disney Way Miami, FL 33147
To The Parents Of: En Aa 1234 Disney Way Miami, FL 33186	To The Parents Of: Sn Aa 1234 Disney Way Coral Gables, FL 33156	To The Parents Of: Jan Aal 1234 Disney Way Miami, FL 33165
To The Parents Of: Ga Aa 1234 Disney Way Miami, FL 33186	To The Parents Of: So Aa 1234 Disney Way Miami, FL 33176	To The Parents Of: Lis Aal 1234 Disney Way Miami, FL 33161

Group Data by Sub-categories and Use CHRIS to Print Letters and Forms

Standard Reports can be used to sort your data automatically using pre-existing categories (see Figure 52).

FIGURE 52: Referral Report Grouped by Zip Code

Referral Report (First Contact and In) Page # ?

Dbnum	Name (Last, First) Student #		DOB ApptDate Sublocation	AgeNow AtEvent	1stCntctDate Ref By Reason
507226	Sdo	Aad	12/19/16	5.04 1.02	
508860	Sle 1234567890	Aem	11/20/16 05/10/18 Discovery	5.05 1.04	
509017	Emo 1234567890	Rch	09/26/16 08/23/19 RCMA-Dade	5.06 1.06	
519124	Thu	Sja	09/05/15	6.07 2.06	03/05/18 Removed for
Total Number Of Children With This Zip:					18
499312	Lne 1234567890	Ero	03/07/16 01/24/18 1 -YES-not in	6.01 1.09	
499724	Ely 1234567890	Eko	01/29/15 02/14/18 Heritage	7.02 2.11	
499730	Hsm	Aka	02/17/16 Reading	6.02 1.10	
499737	Ysh	Eja	03/01/16 Learning	6.01 1.10	
499905	Api	Rch	12/09/16 04/09/20 1 -YES-not in	5.04 1.00	

Forms

The Forms section of CHRIS is where custom forms and letters are stored to be accessed by users. The forms and letters are site specific and are available to users based on geographical privileges. Forms are accessed by clicking on the FORMS link on either the **Demographic** or **Tracking** screens (see Figure 53). The site's forms will then be displayed (see Figure 54).

FIGURE 53: Forms Button

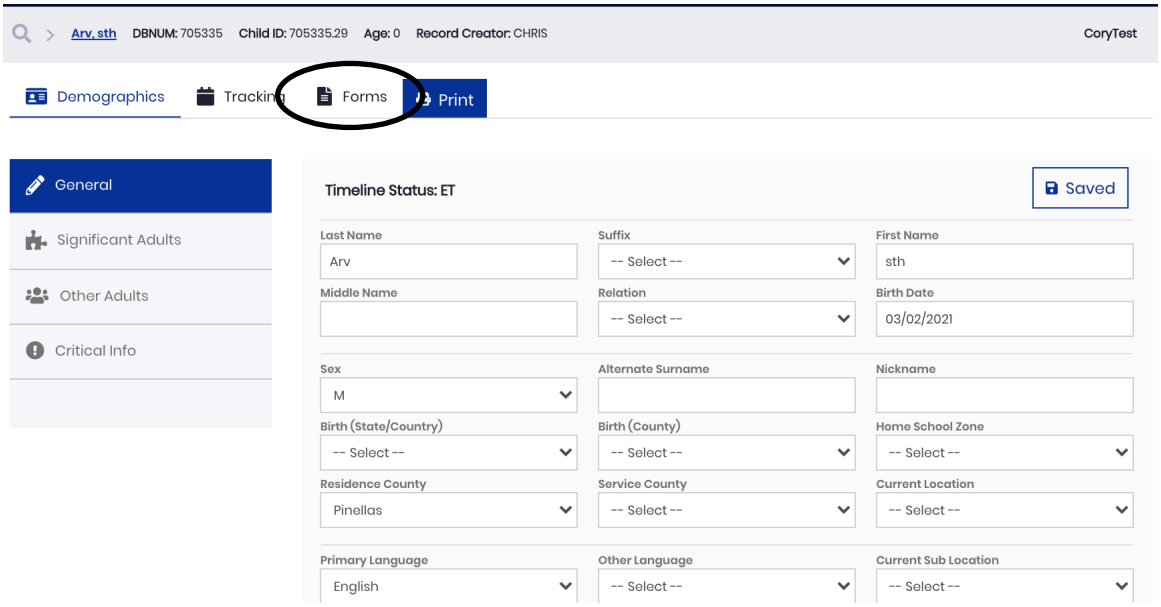
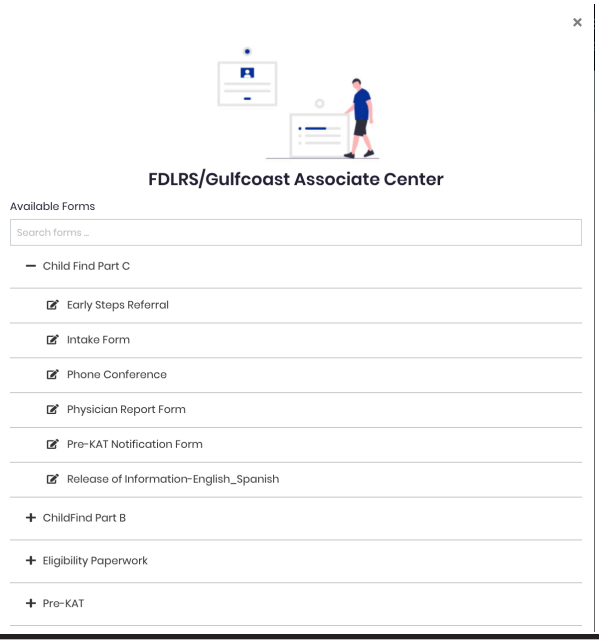


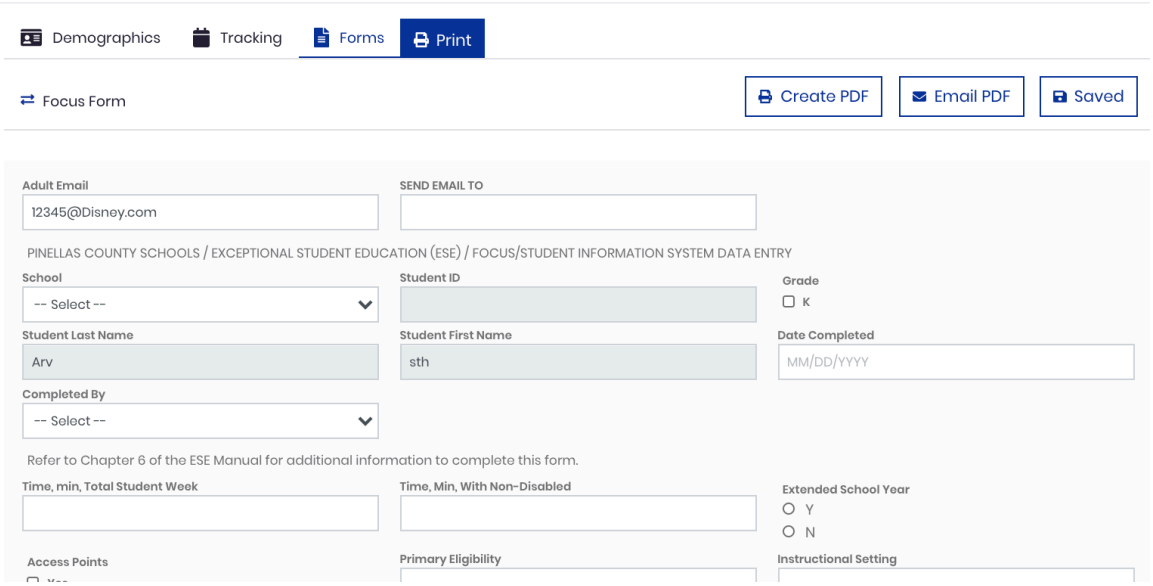
FIGURE 54: Forms Selection Screen



Using Forms

To use Forms in CHRIS, select one from the list and fill out the fillable fields if applicable (see Figure 55). Users are able to download the completed form to their computer or email it directly from CHRIS (see Figure 56).

FIGURE 55: Form Data Entry Screen



Form Generation Options

- CREATE PDF -- Creates the form based on find criteria and automatically downloads a PDF to the user's Download folder on the local computer.
- EMAIL REPORT – Generates a URL link to a PDF copy of the form and automatically sends this link to the email address entered into the "SEND EMAIL TO" field.

FIGURE 56: Completed Form

PINELLAS COUNTY SCHOOLS
EXCEPTIONAL STUDENT EDUCATION (ESE)
FOCUS/STUDENT INFORMATION SYSTEM DATA ENTRY

School: Bay Vista Fundamental Student ID: Grade: K DMT Int. DMT Entry Date:
Student Name - Last:Arv First: sth Middle: Elem HmRm:
Date Completed: 03/02/21 Completed by: L. Collins HS/MS Guidance Initials HS/MS Guidance Date

Refer to Chapter 6 of the ESE Manual for additional information to complete this form.

Instructional Setting:	Time, min, Total Student Week:	Extended School Year Services: Y
Case Manager: Barbara	Time, min, With Non-Disabled:	Next Yr FT Service Delivery Code: D5
FT Service Del: D5	FBA Date:	Next Yr PT Service Delivery 1: P4
PT Service Del1: P3	PBIP Date:	Next Yr PT Service Delivery 2: P3
PT Service Del2: P3	Access Points:	Next Yr PT Service Delivery 3: P2
PT Service Del3: RP	Comments:	**GRADUATION FOCUS SCREEN**
IEP Stop Location: 1		Algebra EOC Waiver:
Equipment Code(DOE M		ELA/Reading Waiver:
Addt'l Equipment(bus): C		Addt'l Waiver(s):
Currnt IEP/EP/SP Date: 03/09/2021		Graduation Option:
Re-Eval Date: 03/09/2021	Primary Eligibility: Hearing	Online Course Exempt:
ESE / FEFP Code:	Gifted Eligibility: Z	Pathway to Grad (Diploma Type):
254/255 Matrix Date: 3/1/21	Alternate Assessment Admin:	**MEDICAL FOCUS SCREEN**
IDEA Ed Environment: J	Test Accomodation (VI/ELL):	Medicaid Parent Authorization: Yes
	Medical Complexity Exemption:	Medicaid Authorization Date: 03/02/21

IEP/EP SERVICES: ALL SPECIALLY DESIGNED INSTRUCTION AND RELATED SERVICES

Course Code/Subject, Access Course, Therapy, Counseling	Service Delivery Model	Teacher/ESE Provider/Gifted Teacher (ESE Service Provider/Primary Teacher)	Location: ESE or Gen Ed and Room #	Period OR Time Frame	Day(s) (MTWHF)	Min per Week	Start Date of Class/Service

DOE COURSE CODE LINKS: ***ESE K-12*** ***GRADES 9-12*** ***GRADES 6-8*** ***GRADES K-5***

PCS Form 2-2208 (Rev. 8/20) Original - Data Management Tech Copy - Case Manager Copy - Guidance (HS/MS) Category Y

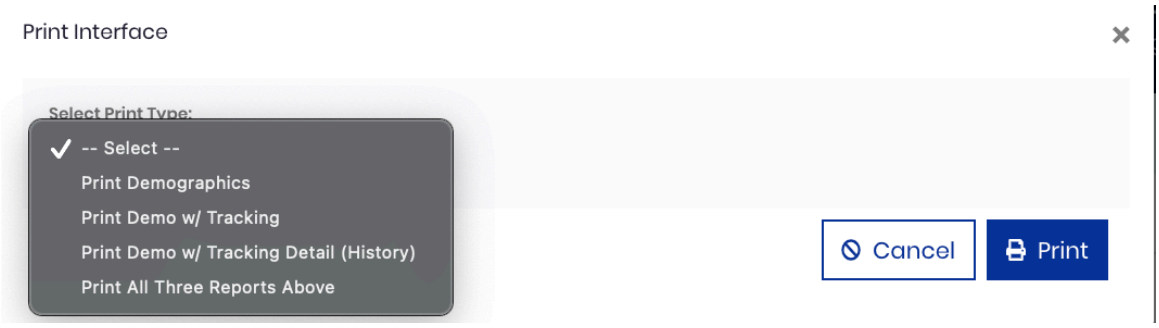
Print Option

Printing options are accessed through the main menu. The print menu is specific to the **Demographic** and **Tracking** screens. When either screen is open, select the PRINT option from the main menu and additional layout printing options will be displayed. All other screens in CHRIS will print as they appear on the screen, including graphics and bold colors.

To print a child's record, complete the following steps:

1. While in the **Demographics** or **Tracking** screen, select the PRINT option from the top of the screen. The PRINT OPTIONS menu will be displayed (see Figure 57).

FIGURE 57: Print Options



2. Select a print option:

- PRINT DEMOGRAPHICS – Downloads a PDF copy of the **Demographic** screen to the current user's Download folder (see Figure 58).
- PRINT DEMO W/TRACKING – Downloads a PDF copy of the **Tracking** screen to the current user's Download folder (see Figure 59).
- PRINT DEMO W/TRACKING DETAIL – Downloads a PDF copy of the **Tracking** screen with detailed Timeline Event information to the local user's Download folder. (see Figure 60).
- PRINT ALL 3 REPORTS ABOVE – CHRIS will automatically download a PDF copy of the **Demographic** screen, the **Tracking** screen, and the **Tracking** screen with event detail information for the current record to the local download folder.

FIGURE 58: Demographics Print Screen

DBNUM: 669358 Name: Oui Sebastian DOB: 9/5/2021

11/12/2024 Child Demographic Information 4:54:23 PM

Dbnum 669358 **Child ID 669358.29** Age 3.02 Record Creator CHRIS

Last Name	Suffix	First Name	Middle Name	Relation	Birth Date	Sex	Home School Zone
Oui	Jr.	Sebastian	James	Twin	9/5/2021	M	Campbell Park Elementary

Alternate Surname	Nickname	Birth(State/Country)	Birth (County)	Current Sub Location
Smith	Seb	Florida	De Soto	Amy Howe

Residence County	Service County	Current Location
Pinellas	Pinellas	Beverly Sexton

Primary Language	Other Language	Migrant
English	Farsi	

Student Number	Ethnicity(Hispanic)	T S
123456789	○ Yes ◉ No	ET

Race (Check all that apply.)

- ☒ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☒ Native Hawaiian or Other Pacific Islander
- ☐ Parent Refused Designation
- ☐ Unknown
- ☒ White

Significant Adults

Last Name	First Name	Relation	LW	Legal Grdian	Courtesy Title	Email
Oui	Rebecca	Mother	Y	Y	Ms.	1234@miami.edu

Phys Address 1234 Disney Way
Mail? Y Gulfport , FL 33333

Phones	Notes	Lang
305-284-5514	Main	Arabic
305-284-6992	Fax	

Mail Address 1234 Disney Way
Gulfport , FL 33333

Directions To Home Turn left

Last Name	First Name	Relation	LW		Courtesy Title	Email
Oui	Frank	Father	N	N	Mr.	Foui@miami.edu

Phys Address 112233 Street RD
Mail? N Seminole , FL 32222

Phones	Notes	Lang
305-284-6992	Main	English

Mail Address
,

Directions To Home There is no place like home

Other Adults

Additional Significant Adult Information

DBNUM: 669358 Name: Oui Sebastian DOB: 9/5/2021

Critical Info

Critical Notes
Don't Call after 5pm
Medicaid Number Social Security Number

NOTE

To print a screen or report for another child, you must open the child's record in either the* Demographics *or* Tracking *screen and then select the PRINT option from the top of the screen.

FIGURE 59: Demo W/Tracking Print Screen

DBNUM: 669358 Name: Oui Sebastian DOB: 9/5/2021

11/12/2024 Tracking Summary 4:57:36 PM

Name: **Oui , Sebastian James**
DOB: 9/5/2021 Age: 3.02 SY5: 2027
3rd BDay: 9/5/2024 Language: English
County Of Residence: Pinellas

DBNUM: 669358 Child_ID: **669358.29** Code: Jessica R
Update Date: 9/18/2024 Record Creator: CHRIS
Current Location: Beverly Sexton
Current Sub-Location: Amy Howe

Staff Assigned: Boltz/Liss
ISC or Service Coordinator: Davis, Katie
Code: Jessica Rey

Exceptionality Status: E
Timeline Status: ET
Service Coordination Status: AP

PreK Head Start Migrant PreK Even Start
Funding Program:

Interagency Release: N
Start Date:
End Date:

Agencies/Providers: Ohana Preschool

Tracking Timeline Events

# of Timelines: 1 Time Elapsed: 2

Event	Date	AN	Summary	Days
Transition Ref				
Screening	09/03/24	*	9/2/2024,F	
Evaluation	09/04/24	*	9/4/2024 , Audiolog ,	1
ESE Eligibility	09/05/24	*	HH (M)	1
IEP/IFSP	09/05/24	*	Adventure Academy,Public	0
End Timeline	09/05/24		IFSP/IEP Developed	0

Service Coordination Events

Event	Date	AN	Summary
Appointments	10/08/24		
Periodic Follow-Up	09/17/24		,Speak to parents
Referral Closed	09/05/24	*	Entered Part B Services
Folder To ESE	09/04/24		9/4/2024,
Contact Log	09/02/24		Folder Completed Date
Contact Log	09/01/24		
Contact Log	09/01/24		
Referral Inactive	09/01/24		Child did not enroll
Referral In	09/01/24	*	Boltz/Liss,Hearing
Referral In	08/30/24		
Contact Log	08/30/24		
Referral Out	08/30/24	*	Kagan, Dr. Brian - Pediatrics,Needed
Packet Returned	08/30/24		

FIGURE 60: Demo W/Tracking Detail Print Screen

DBNUM: 669358 Name: Oui Sebastian DOB: 9/5/2021

11/12/2024 Tracking Summary 4:59:26 PM

Name: **Oui , Sebastian James**
DOB: 9/5/2021 Age: 3.02 SY5: 2027
3rd BDay: 9/5/2024 Language: English
County Of Residence: Pinellas

DBNUM: 669358 Child_ID: **669358.29** Code:
Jessica Rey
Update Date: 9/18/2024 Record Creator: CHRIS
Current Location: Beverly Sexton
Current Sub-Location: Amy Howe

Staff Assigned: Boltz/Liss
ISC or Service Coordinator: Davis, Katie
Code: Jessica Rey
PreK Funding Program: Head Start Migrant PreK Even Start
Agencies/Providers: Ohana Preschool

Exceptionality Status: E
Timeline Status: ET
Service Coordination Status: AP
Interagency Release: N
Start Date:
End Date:

Tracking Timeline Events

Trans Ref Date	Tran Mtg Date	Consent For Referral	Consent Record Transfer	Part C Provider	Part C Serv Coord	Ref Pack Received Date	Notes

Screen Date			Presenting Problem 1			Presenting Problem 2			Presenting Problem 3					
Screen. Reques. FnlRes SFR Date	RecRev P/F Date PRVD Loc.	ParCon P/F Date PRVD Loc.	ParRep P/F Date PRVD Loc.	ProfRep P/F Date PRVD Loc.	Obsrv P/F Date PRVD Loc.	Dvlpmnt P/F Date PRVD Loc.	Vision P/F Date PRVD Loc.	Behav P/F Date PRVD Loc.	Cognit P/F Date PRVD Loc.	Hearing P/F Date PRVD Loc.	Lang P/F Date PRVD Loc.	Motor P/F Date PRVD Loc.	Speech P/F Date PRVD Loc.
9/2/24			Hearing Concerns			Motor Concerns			Language Concerns				
F										F	F	P	
9/3/24										9/3/24	9/3/24	9/3/24	
										AINSWOR	AVPK	BB	
										Sherri	Boltz/Liss	Chris	

Help

The HELP button is available from the CHRIS main menu and links to the *Field Reference Guide,* which provides definitions for all fields in the CHRIS program. The *Field Reference Guide* can be used as a search index to look up all of the CHRIS field names and their definitions. These results provide general definitions, guidelines for data entry, and information regarding how the fields are to be used.

Sign Out

The last option in the CHRIS main menu is the SIGN OUT button. Selecting this option is the proper way to close the CHRIS Database. Remember that CHRIS should not be left open and unattended if it is in a non-secure area (e.g., an area accessible to the public).

DO NOT click the ✕ button in the top-right corner of the screen. Exiting the CHRIS program in this manner may cause data corruption. Instead, use the main menu SIGN OUT option as described above.