



Children's Registry and Information System Reports Manual

Technical Support Information

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

About This Manual

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

For additional information on the CHRIS Project, refer to the *User Manual*, *Data Facilitator Manual* and *Field Reference Guide*. All support documentation can be retrieved from the CHRIS website at www.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 Education
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 .
<i>Italics</i>	Field names, as well as references to tables, figures, and hands-on exercises, are presented in <i>italics</i> .
UPPERCASE	CHRIS buttons and main menu options are presented in UPPERCASE letters.
Title Case	CHRIS-related reports, event names, functions, and lists (e.g., Duplicate Child Report, Service Coordination, Child Record Locator, Code List) are presented in Title Case.



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



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

Table of Contents

About This Manual	ii
Legend	iii
Reports in CHRIS.....	1
Find Criteria Screen	5
Performing Accurate Finds	9
Find Operators.....	10
Standard Report Examples.....	11
Demographic Reports.....	11
Basic Reports	13
Complex Reports	15
Reports with an Or Find.....	16
Reports with an Omit Request	17
Action Needed Report.....	19
Site Reports	21

Reports in CHRIS

The CHRIS software program contains a variety of standard report templates to assist users in creating commonly used reports. In addition, all reports can be accessed from the **Reports** screen. To access the reporting features in the CHRIS program, click the REPORTS button from the CHRIS main menu (see Figure 1).

FIGURE 1 Record Locator Screen

The screenshot shows the CHRIS software interface. At the top, there is a dark header bar with the "CHRIS" logo on the left and several menu items on the right: Help, Record Locator, Reports (which is circled in red), Manage Lists, and Sign Out. Below the header, a user profile "chrispinellas" is displayed. The main content area is titled "Enter your desired search criteria below, then click "Search". It includes fields for DBNUM, Last Name, First Name, and Birth Date Range (From and To dates). There is also a link to "Advanced Search Options". At the bottom right are "Clear" and "Search" buttons.

Clicking the REPORTS button on the main menu will display the **Reports** screen (see Figure 2). The **Reports** screen displays all of the report options for the CHRIS program.

FIGURE 2 Reports Screen



The figure shows a person standing next to a computer monitor. The monitor displays the 'Reports' screen with the title 'Reports' at the top. Below the title is a section titled 'Available Reports' containing a search bar labeled 'Search reports ...'. A list of report options follows:

- 60 Day Rule Report
- Days Elapsed between Screening and Parent Consent
- + FDLRS Gulfcoast Pinellas Reports
- SOD Completed Screening Report
- SOD Referral for Evaluation Report
- SOD Referral Report
- + Standard Reports

Using the Reports Screen

Options labeled with the icon indicate a direct link to the named report where a user can enter find criteria and sort orders to perform a find (see Figure 2).

Options labeled with the + icon indicate a folder that will expand to display the report layouts contained within (see Figure 3).

FIGURE 3 Expanded Folder Options



The figure shows the 'Reports' screen with the title 'Reports' at the top. Below the title is a section titled 'Available Reports' containing a search bar labeled 'Search reports ...'. A list of report options follows:

- 60 Day Rule Report
- Days Elapsed between Screening and Parent Consent
- FDLRS Gulfcoast Pinellas Reports
- Transition Report

Searching Available Reports

The SEARCH REPORTS option allows the user to perform an exact-match search of all user accessible report layouts in CHRIS. Typing the first few letters of a known report layout will display that option below (see Figure 4).

FIGURE 4 Search Available Reports



Available Reports

The following reports are available:

- “CURRENT USER’S SITE” REPORTS – Contains custom reports created by the Help Desk for the current user’s site.
- STANDARD REPORTS – Contains standard reports.
- 60-DAY RULE REPORT – Contains a report of days elapsed from Parent Consent for Evaluation to Evaluation Completion Date. Includes average number of days and can be displayed graphically and/or in a list.
- DAYS ELAPSED BETWEEN SCREENING AND PARENT CONSENT– Contains a report of days elapsed from Screening to Parent Consent for Evaluation. Includes average number of days and can be displayed graphically and/or in a list.
- 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).
- 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).

Standard Reports

Expanding the STANDARD REPORTS option will display the standard reports available to all CHRIS users (see Figure 5). Click the button to select the desired report.

FIGURE 5 Standard Reports Options

<input checked="" type="checkbox"/> 5 Y/O Active Report	<input checked="" type="checkbox"/> Presenting Problem Report
<input checked="" type="checkbox"/> Action Needed Report	<input checked="" type="checkbox"/> Referral Report (First Contact and In)
<input checked="" type="checkbox"/> Action Needed Report With Event Info	<input checked="" type="checkbox"/> Screening Appointment Report
<input checked="" type="checkbox"/> Address Labels	<input checked="" type="checkbox"/> Screening Labels
<input checked="" type="checkbox"/> Appointment Schedule	<input checked="" type="checkbox"/> Screening Results Report
<input checked="" type="checkbox"/> Child Outcomes Form Excel Report	<input checked="" type="checkbox"/> Screening Schedule Report
<input checked="" type="checkbox"/> Children's List	<input checked="" type="checkbox"/> Screening_Evaluation Report
<input checked="" type="checkbox"/> Code Summary	<input checked="" type="checkbox"/> Speech/Language Evaluation Report
<input checked="" type="checkbox"/> Early Steps Referral Follow-up Report	<input checked="" type="checkbox"/> Timeline Status Summary Data (Brief)(Year)
<input checked="" type="checkbox"/> End Timeline/Inactive Reason Report	<input checked="" type="checkbox"/> Timeline Status Summary Data (Brief)(Yr&Mnth)
<input checked="" type="checkbox"/> ESE Staffing Report	<input checked="" type="checkbox"/> Timeline Status Summary Data (Detailed)
<input checked="" type="checkbox"/> Event Count By Age Range (Year)	<input checked="" type="checkbox"/> Timelines Report
<input checked="" type="checkbox"/> Event Count By Age Range (Year/Month)	<input checked="" type="checkbox"/> Tracking Status of Referral for Screening
<input checked="" type="checkbox"/> IEP/IFSP Report	<input checked="" type="checkbox"/> Verification Activity for Indicator 12
<input checked="" type="checkbox"/> Inactive Report	
<input checked="" type="checkbox"/> % Increase of Transitions(Indicator 12)	
<input checked="" type="checkbox"/> Master Timeline Reason/Close/Total Report	

 **For more information regarding the Screening_Evaluation Report, please access the "Screening_Evaluation Report Training Video" link on chris.miami.edu by navigating to the Training tab and then selecting the "Reports" section.**

Find Criteria Screen

Selecting any of the Standard Reports or site-specific reports from the **Reports** screen (see Figure 2) will display the **Find Criteria** screen (see Figure 6). The **Find Criteria** screen is used to enter the find criteria used to create standard and site-specific reports for the CHRIS database.

FIGURE 6 Find Criteria Screen

The screenshot shows the 'Find Criteria' screen. At the top left, there is a red circle around a 'Go Back Arrow' icon pointing to the left. Next to it is the text 'Find Timeline/Inactive Reason Report'. On the right side, there are three buttons: 'Generate Report', 'Generate Count', and 'Email Report Link'.

The main area is titled 'Find Criteria' and contains a table with four columns: 'Table', 'Event', 'Field', and 'Value'. There are three rows of these fields. Each row has a radio button labeled 'Or' and another labeled 'Ormit' below it. Below the table, there is a section titled 'Sort Criteria' with a dropdown menu.

Table	Event	Field	Value
-- Select --	-- Select --	-- Select --	
-- Select --	-- Select --	-- Select --	
<input type="radio"/> Or			
<input type="radio"/> Ormit			
-- Select --	-- Select --	-- Select --	
<input type="radio"/> Or			
<input type="radio"/> Ormit			
-- Select --	-- Select --	-- Select --	
<input type="radio"/> Or			
<input type="radio"/> Ormit			

At the bottom right, there are three buttons: 'Generate Report', 'Generate Count', and 'Email Report Link'.

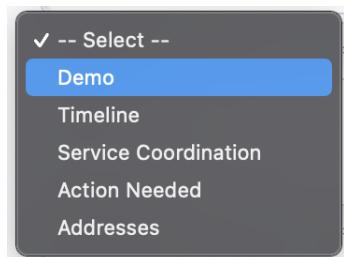
Each section of the **Find Criteria** screen allows users to enter search criteria that will be used to find data related to the desired report.

FIGURE 7 1st Row Find Criteria Screen Section

Table	Event	Field	Value
-- Select -- Timeline	-- Select --	-- Select --	

The first row of the **Find Criteria** screen will only allow the most appropriate table to be selected for the desired report (see Figure 7).

FIGURE 8 CHRIS Available Tables



There are five tables available in CHRIS (see Figure 8). 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 9). 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 (see Figure 10). All required fields in the first row will be outlined in red until the appropriate data have been entered (see Figures 9 & 10)

FIGURE 9 Event Drop-Down

Table	Event	Field	Value
Timeline	-- Select -- EndTimeline ESEEligibility IEPISP ReferralForEvaluation ReferralForScreening Transition	-- Select --	

FIGURE 10 Event Drop-Down Bypassed

Table	Event	Field	Value
Demo	-- Select --	-- Select --	

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

FIGURE 11 Find Criteria Screen Field Dropdown

Find Criteria

Table: Timeline

Event: IEPIFSP

Field: -- Select --
IEPIFSPAgeAtEvent
IEPIFSPDate
IEPIFSPEducationalEnvironment1
IEPIFSPEducationalEnvironment2

The find criteria are entered into the *Value* field (see Figure 12). For example, a date range would be entered as 01/01/2025...03/31/2025.

FIGURE 12 Find Criteria Screen Value Field

Find Criteria

Table: Timeline

Event: IEPIFSP

Field: IEPIFSPDate

Value: 01/01/2025..03/31/2025

FIGURE 13 Reports Find Options

Sort Criteria: -- Select --
ActionNeeded
ActionNeededFUDate
AdultZip
ApptDate_Name
ApptDate_Time
Child_Name
Code
COR
COR_Age
COR_Age_SCStatus
COR_DOB_Name
COR_ScrFinalResult
DOB_Name
EducationEnvironment
EndReason
Ethnicity
EvaluationDiagnosticians
ExceptionalityStatus
LanguageProficiency
Location
Name_ApptDate
Name_Staff_ANFollowUpDate
PlanType
PrimaryExceptionality
Race
ReferralAgency
RefFirstRefSource_RefFirstRefBy
ReferralsInactiveReason
RefinRefSource_RefinRefBy
ScrFinalResult_ScrNotes
ScrNotes
ServCoordStatus
Speech_Language_Diagnostician
StaffAssigned
StaffAssigned_ANFollowUpDate
SubLocation
TimelineStatus
TimelineStatus_Age

 The GO BACK arrow at the top left of the **Find Criteria** screen (see Figure 6) cancels the find and returns the user to the **Reports** screen (see Figure 2).

The **Find Criteria** screen (see Figure 6) contains the following options for performing complex finds (see Figure 13):

- 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.
- SORT CRITERIA – Provides options for sorting the data in the report. Select the option associated with the desired sort option.

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.

Find Criteria Screen Output Functions

The **Find Criteria** screen (see Figure 6) has three output options represented by three buttons at the top of the screen and the same three buttons at the bottom of the screen. GENERATE REPORT, GENERATE COUNT and EMAIL REPORT. Once the user has entered their desired find criteria, they need to select one of these three options to view the found set:

- GENERATE REPORT – Creates a PDF file of the report layout chosen using the found set generated by the chosen find criteria. This PDF file is automatically downloaded into the CHRIS user’s Download Folder.
- GENERATE COUNT – Displays the total number of records found using the chosen find criteria. The find criteria will remain after the count has been generated so that individual fields can be changed and a new count can be generated without re-entering all the find criteria.
- EMAIL REPORT LINK – Emails a link to a downloadable PDF file of the report to the current user’s email address. To protect confidentiality, this link will expire after 24 hours.

 **If a necessary sort order is missing from the Sort Criteria drop-down list, please contact the Help Desk so that a new item can be added to the program and appear on the list for all users.**

Performing Accurate Finds

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

1. Know what specific data are required to create the desired report.
2. Be specific when performing finds. Given the number of records in the statewide database, it helps to be specific when performing finds. Enter date ranges, ID numbers, database numbers, or special terms to narrow the find criteria and return the data desired.
3. Limit the use of excessive search criteria. The **Find Criteria** screen allows users to enter search criteria in up to four separate find sections. However, using numerous search criteria in a single report can cause inaccurate results. If you need to perform complicated finds to develop your report, contact the Help Desk for assistance.



Reports and forms that are emailed or downloaded from CHRIS can contain confidential data. Downloaded or emailed files should be given the same consideration as confidential paperwork, file folders, and other materials containing personal information. The user's Download Folder should be periodically purged of confidential files.

Find Operators

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

TABLE 1 Find Operators Table

To find values that:	Use this operator:	Example:
Are less than the value of the item	<	<40 or <09/09/2024
Are less than or equal to the value of the item	<=	<=50
Are greater than the value of the item	>	>10/10/2024
Are greater than or equal to the value of the item	>=	>=10
Have some or all of a field's contents	=	=Ann (finds Ann or Ann Marie but not Annie)
Are an exact match of the field's contents	==	==Anne (finds Anne but not Ann Marie or Annie)
Are within the range specified	...	12:30...17:30
Are duplicated values	!	!Ann (finds Ann or Annie or Annette)
Include today's date	//	//
Have invalid dates or times	?	?
Have any one character	@	@
Have any one digit	#	#
Have zero or more unknown or variable text characters	*	*Anne* (finds Anne or Annette or Brianne)
Escape next character	\	\e
Include literal text (including spaces and punctuation) in a field (text exactly as it appears, but regardless of uppercase or lowercase)	""	"Jean-Louis"
Match phrase from anywhere (not only word start)	*""	"Louis"
Have empty fields	=	=

Standard Report Examples

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

Demographic Reports

To run a Demographic Report, first select a demographic based Standard Report layout, (see Figure 5) then enter the appropriate find criteria. In this example, only demographic data are selected (see Figure 14).

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

Table: Demo

Event: (bypassed when Demo table is selected)

Field: DOB

Value: 01/15/2022..03/15/2022

FIGURE 14 Find Criteria Screen with Demographic Find

Find Criteria			
Table	Event	Field	Value
Demo	-- Select --	DOB	01/15/2022..03/15/2022

In this example, the found set of records will include children born between January 15, 2022 and March 15, 2022.

Before performing the find, select the sort criteria (see Figure 13).

The demographic reporting options include the following:

- CHILDREN'S LIST – Generates a list of children's records.
- ADDRESS LABELS – Generates address labels for the records selected.
- CODE SUMMARY – Generates a summary of the values contained in the Code Definitions List. Each site can use the *Code* field in whatever way is most beneficial to that site and the data facilitator can update this list.
- Early Steps REFERRAL FOLLOW-UP REPORT – Generates a follow-up report of Early Steps referrals.



Complex Demographic Reports can be run multiple find criteria. See the Complex Reports section of this manual.

Exercise 1: Running a Demographic Report

1. Select the **REPORTS** option from the main menu.
 2. Click the **STANDARD REPORTS** button.
 3. Select the **CHILDREN'S LIST** option.
 4. Select **DEMO** from the Table drop-down list.
 5. Select the **DOB** field from the Field drop-down list.
 6. Enter the following information in the Value field:
DOB: 6/2022
 7. Select the **Child_Name** option from the Sort Criteria drop-down
 8. Select the **GENERATE REPORT** option.
 9. Open the Downloads folder to view the report.
-

Basic Reports

To run a Basic Report using a single table, select a report and the table, an event (if necessary), a field, and a value. In this example the Referral Report and the Referral In Service Coordination event is selected (see Figure 15).

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

*Table: ServiceCoordination
Event: ReferralsIn
Field: ReferralsInDate
Value: 1/2025...2/28/2025*

FIGURE 15 Find Criteria Screen with Basic Find

The screenshot shows a 'Find Criteria' interface with four input fields. The 'Table' field contains 'Service Coordination'. The 'Event' field contains 'ReferralsIn'. The 'Field' field contains 'ReferralsInDate'. The 'Value' field contains '01/01/2025..02/28/2025'.

Find Criteria			
Table	Event	Field	Value
Service Coordination	ReferralsIn	ReferralsInDate	01/01/2025..02/28/2025

In this example, the found set of records will include children with a Referral In Date during the months of January and February 2025.

Before performing the find, select the sort criteria (see Figure 13).

Exercise 2: Running a Basic Report

1. Select the **REPORTS** option from the main menu.
 2. Choose the **STANDARD REPORTS** option.
 3. Select the **APPOINTMENT SCHEDULE** option.
 4. Select the **SERVICE COORDINATION** option.
 5. Select **APPOINTMENTS** from the event drop-down list.
 6. Select **ApptDate** from the field drop-down list.
 7. Enter the following information:
Appt Date: 6/2025...8/2025
 8. Select the **ApptDate_Time Sort** Criteria option.
 9. Select the **GENERATE REPORT** option.
 10. Open the Downloads folder to view the report.
 11. Scroll to the bottom to make a note of the number of records found.
-

Complex Reports

Complex reports are based on multiple tables. The **Find Criteria** screen allows users to enter search criteria in up to four separate find sections. In this example, both the Screening (Timeline) and Referral First Contact (Service Coordination) events are selected (see Figure 16).

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

Table: Timeline

Event: Screening

Field: ScrReferralForScreeningDate

Value: 2/2025

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

Table: ServiceCoordination

Event: ReferralFirstContact

Field: ReferralFirstContactDate

Value: 2/2025

The *Table* field allows users to select the source of data needed. For the second through fourth sections, select the table using the *Table* drop-down list (see Figures 8 & 16).

FIGURE 16 Find Criteria Screen with Complex Find

Find Criteria			
Table	Event	Field	Value
Timeline	ReferralForScreening	ScrReferralForScreeningDate	02/01/2025..02/28/2025
Service Coordination	ReferralFirstContact	ReferralFirstContactDate	02/01/2025..02/28/2025

In this example, the found set of records will include children who had both a *Referral for Screening Date* and a *Referral First Contact Date* in February, 2025.

Before performing the find, select the sort criteria (see Figure 13).

Reports with an Or Find

The Or option is used to include records that meet the criteria from a section of the **Find Criteria** screen regardless of the criteria specified in any other sections. In this example, a find is performed on the Referral First Contact event, and then that found set is expanded by adding records with a Referral In event (see Figure 17).

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

*Table: ServiceCoordination
Event: ReferralFirstContact
Field: ReferralFirstContactDate
Value: 2/2025*

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

*Table: ServiceCoordination
Event: ReferralsIn
Field: ReferralsInDate
Value: 2/2025
Option: Or*

FIGURE 17 Find Criteria Screen with Or Find

The screenshot shows the 'Find Criteria' screen with two sections of criteria. Each section has four fields: Table, Event, Field, and Value. The first section's Table is 'Service Coordination', Event is 'ReferralFirstContact', Field is 'ReferralFirstContactDate', and Value is '02/01/2025..02/28/2025'. The second section's Table is also 'Service Coordination', Event is 'ReferralsIn', Field is 'ReferralsInDate', and Value is '02/01/2025..02/28/2025'. Below the sections is a radio button group with 'Or' selected and 'Omit' as an option.

Table	Event	Field	Value
Service Coordination	ReferralFirstContact	ReferralFirstContactDate	02/01/2025..02/28/2025
Service Coordination	ReferralsIn	ReferralsInDate	02/01/2025..02/28/2025

Or
 Omit

In this example, the found set of records will include children who had either a *Referral First Contact Date* or a *Referral In Date* in February 2025.

Before performing the find, select the sort criteria (see Figure 13).

Reports with an Omit Request

The Omit option is used to exclude information from a find. In this example, a find is performed on demographic data, and then that found set is narrowed by eliminating any records that contain an open timeline (see Figure 18).

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

*Table: Demo
Event: (bypassed when Demo table is selected)
Field: DOB
Value: 1/2022*

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

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

FIGURE 18 Find Criteria Screen with Omit Request

Find Criteria			
Table	Event	Field	Value
Demo	-- Select --	DOB	01/01/2022..01/31/2022
Timeline	EndTimeline	EndDate	=

Or
 Omit

In this example, the found set of records will contain data from the first section of the **Find Criteria** screen and omit the data from the second section of the **Find Criteria** screen. In this example, the find would result in a list of children born in January 2022 with a completed Timeline.

Before performing the find, select the sort criteria (see Figure 13).

Exercise 3: Running a Complex Report

1. Select the **REPORTS** option from the main menu.
 2. Click the **STANDARD REPORTS** button.
 3. Select the **IEP/IFSP** Report option.
 4. Select **Timeline** from the Table drop-down list.
 5. Select **End Timeline** from the event drop-down list.
 6. Select **EndDate** from the field drop-down list.
 7. Type the following information:
EndDate: 01/01/2025...01/31/2025
 8. Select **SERVICE COORDINATION** from the Table drop-down list in the next section.
 9. Select **Referral Inactive** from the event drop-down list.
 10. Select **ReferralInactiveDate** from the field drop-down list.
 11. Type the following information:
Referral Inactive: 01/01/2025...01/31/2025
 12. Click the **OR** button.
 13. Select **ChildName** from the Sort Criteria drop-down list.
 14. Select the **GENERATE REPORT** option.
 15. Open the Downloads folder to view the report.
 16. Scroll to the bottom to make a note of the number of records found.
-

Action Needed Report

The Action Needed Report contains information that can be used for creating daily or weekly reports to assist in developing task lists for individual case managers or for Child Find team activities. To run an Action Needed Report, first expand the STANDARD REPORTS option from the **Reports** screen, select the ACTION NEEDED REPORT option and then select the appropriate find criteria (see Figure 19).

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

Table: ActionNeeded

Event: (bypassed when ActionNeeded table is selected)

Field: ANFollowUpDate

Value: 01/01/2025...01/31/2025

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

Table: ActionNeeded

Event: (bypassed when ActionNeeded table is selected)

Field: ANCompletedDate

Value: =

FIGURE 19 Find Criteria Screen Action Needed Find

Find Criteria			
Table	Event	Field	Value
Action Needed	-- Select --	ANFollowUpDate	01/01/2025...01/31/2025
Action Needed	-- Select --	ANCompletedDate	=

In this example, the found set of records would include children who had an *Action Needed Follow Up Date* during the month of January 2025 and did not have an *Action Needed Completed Date*.

Before performing the find, select the sort criteria (see Figure 13).

Exercise 4: Running an Action Needed Report

1. Select the **REPORTS** option from the main menu.
 2. Click the **STANDARD REPORTS** button.
 3. Select the **ACTION NEEDED** option.
 4. Select **ACTION NEEDED** from the Table drop-down list.
 5. Select **ANFollowUpDate** from the field drop-down list.
 6. Enter the following information:
ANFollowUpDate: 02/01/2025...02/28/2025
 7. In the second row, select **ACTION NEEDED** from the Table drop-down list.
 8. Select **ANCompletedDate** from the Table drop-down list.
 9. Enter the following information:
ANCompletedDate: =
 10. Select **ChildName** from the Sort Criteria drop-down list.
 11. Select the **GENERATE REPORT** option.
 12. Open the Downloads folder to view the report.
 13. Scroll to the bottom to make a note of the number of records found.
-

Site Reports

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

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

Due to the complexity of these reports, only the CHRIS Help Desk can generate Site Reports. The data facilitator is responsible for contacting the Help Desk to request a Site Report.

Workload Report

The Workload Report is based on a set of seven events. This includes the total number of Referral First Contact (*First Contact Date*), Referral In (*Referral In Date*), Part C to Part B (*Part C to Part B Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individual Educational Plan/Individualized Family Support Plan (*IEP/IFSP Date*) events for each school year (see Figure 20).

FIGURE 20 Site Workload Report

3 Year Comparative Center Report (Workload)														Report Date: 02/05/2025	Report Time: 4:26:08 PM	
Sum Of Count		Month														
Category	Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total		
First Contact	22/23	404	370	471	514	360	303	516	432	417	432	371	287	4877		
First Contact	23/24	I	384	419	450	443	343	266	497	403	422	476	437	365	4905	
First Contact	24/25	I	277	609	453	316	473	370	337	508	554	327	294	186	4704	
First Contact	Total		1065	1398	1374	1273	1176	939	1350	1343	1393	1235	1102	838	14486	
Referral In	22/23	I	79	76	95	75	66	46	120	89	84	80	68	65	943	
Referral In	23/24	I	79	83	93	95	93	83	122	95	84	96	95	84	1102	
Referral In	24/25	I	60	96	96	88	113	112	99	160	151	121	74	21	1191	
Referral In	Total		218	255	284	258	272	241	341	344	319	297	237	170	3236	
Part C To Part B	22/23	I	106	58	72	112	68	80	71	105	84	79	89	96	1020	
Part C To Part B	23/24	I	117	108	94	95	88	68	76	91	89	90	113	119	1148	
Part C To Part B	24/25	I	92	107	88	99	100	104	100	99	94	38	29	2	952	
Part C To Part B	Total		315	273	254	306	256	252	247	295	267	207	231	217	3120	
Screening	22/23	I	111	79	280	366	230	222	252	300	264	291	282	272	2949	
Screening	23/24	I	164	289	290	312	281	216	280	299	296	285	316	303	3331	
Screening	24/25	I	123	278	270	209	205	178	188	212	221	130	146	8	2168	
Screening	Total		398	646	840	887	716	616	720	811	781	706	744	583	8448	
Evaluation	22/23	I	111	155	248	279	191	168	204	204	180	231	194	198	2363	
Evaluation	23/24	I	109	222	242	250	200	164	228	217	217	237	218	256	2560	
Evaluation	24/25	I	114	235	241	198	188	171	183	183	253	154	201	17	2138	
Evaluation	Total		334	612	731	727	579	503	615	604	650	622	613	471	7061	
ESE Eligibility	22/23	I	114	191	194	235	180	196	209	209	184	210	188	221	2331	
ESE Eligibility	23/24	I	146	180	229	222	203	176	225	207	218	198	222	254	2480	
ESE Eligibility	24/25	I	106	260	250	195	194	197	162	206	229	143	236	130	2308	
ESE Eligibility	Total		366	631	673	652	577	569	596	622	631	551	646	605	7119	
IEP/IFSP	22/23	I	105	167	170	220	170	182	195	197	171	193	172	216	2158	
IEP/IFSP	23/24	I	135	168	219	213	190	167	207	202	205	183	207	231	2327	
IEP/IFSP	24/25	I	101	249	237	184	180	164	152	191	210	135	215	127	2145	

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

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

Unduplicated Report

The Unduplicated Report is based on the number of children served and contains the total number of children who have a Referral First Contact (*First Contact Date*), Part C to Part B (*Part C to Part B Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individual Educational Plan/Individualized Family Support Plan (*IEP/IFSP Date*) event for each school year (see Figure 21).

FIGURE 21 Site Unduplicated Report

3 Year Comparative Center Report (Unduplicated)													Report Date:	02/05/2025		
													Report Time:	4:19:33 PM		
Sum Of Count		Category	Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
Category	Year			404	370	471	514	360	303	516	432	417	432	371	287	4877
First Contact	22/23			404	370	471	514	360	303	516	432	417	432	371	287	4877
First Contact	23/24			384	419	450	443	343	266	497	403	422	476	437	365	4905
First Contact	24/25			277	609	453	316	473	370	337	508	554	327	294	186	4704
First Contact	Total			1065	1398	1374	1273	1176	939	1350	1343	1393	1235	1102	838	14486
Part C To Part B	22/23			106	58	72	112	67	80	71	105	83	79	89	96	1018
Part C To Part B	23/24			117	108	93	94	88	68	76	91	89	90	113	119	1146
Part C To Part B	24/25			92	107	88	99	100	104	100	99	94	38	29	2	952
Part C To Part B	Total			315	273	253	305	255	252	247	295	266	207	231	217	3116
Screening	22/23			111	79	276	366	229	221	251	300	264	288	285	270	2940
Screening	23/24			164	289	290	313	277	215	279	299	296	285	315	303	3325
Screening	24/25			123	278	269	209	205	178	188	212	221	130	143	8	2164
Screening	Total			398	646	835	888	711	614	718	811	781	703	743	581	8429
Evaluation	22/23			111	154	247	278	190	168	204	204	178	229	197	198	2358
Evaluation	23/24			109	221	241	249	200	163	227	217	217	238	218	256	2556
Evaluation	24/25			114	235	241	198	188	171	183	183	253	153	201	17	2137
Evaluation	Total			334	610	729	725	578	502	614	604	648	620	616	471	7051
ESE Eligibility	22/23			109	186	195	236	178	195	209	210	184	208	189	222	2321
ESE Eligibility	23/24			145	180	229	220	203	176	224	207	218	198	222	256	2478
ESE Eligibility	24/25			106	260	250	195	194	197	162	206	229	143	236	130	2308
ESE Eligibility	Total			360	626	674	651	575	568	595	623	631	549	647	608	7107
IEP/IFSP	22/23			100	162	171	221	168	181	195	197	171	191	173	216	2146
IEP/IFSP	23/24			135	168	219	212	190	168	207	202	205	183	207	233	2329
IEP/IFSP	24/25			101	249	237	184	180	164	152	191	210	135	215	127	2145
IEP/IFSP	Total			336	579	627	617	538	513	554	590	586	509	595	576	6620
Records Transferred In During School Year:													24/25	52		
Records Transferred Out During School Year:													24/25	96		
<p>The Site report provides a summary of Child Find activities by month and year for the three previous school year Reports can be generated by center, county, or site. Two types of reports can be generated: Workload and Unduplicated. The Workload report is based on a set of seven events, and the Unduplicated report is based on the total number of children served For instance, if a child was screened twice, the child would count only once in the Unduplicated report, but both screen events would be counted in the Workload report.</p>																
Find Criteria: First Contact – First Contact Date Referral In (Workload Only) – Referral In Date Part C to Part B – Part C to Part B Meeting Date or Part C to Part B Referral Date Screening – Date of Final Result								Evaluation – Completion Date ESE Eligibility – ESE Eligibility Date IEP/IFSP – IEP/IFSP Date								

