Children's Registry and Information System
Reports Manual

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About This Manual

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

For additional information on the CHRIS Project, refer to the *User Manual*, *Data Facilitator Manual*, *Field Reference Guide, Advanced Reporter Manual, and Interactive Online FileMaker Training*. All support documentation can be retrieved from the CHRIS website at http://www.chris.miami.edu.

This document was developed by the University of Miami, Department of Psychology, through CHRIS, a special project funded by the Florida Department of Education, Division of Public Schools, Bureau of Exceptional Education and Student Services (BEESS), through federal assistance under the Individuals with Disabilities Education Act (IDEA), Part B.

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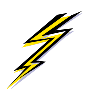
Legend

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

Bold	The titles of CHRIS Gold screens and screen sections are presented in **bold-faced type**.
Italics	Field names, as well as references to tables, figures, and hands-on exercises, are presented in *italics*.
UPPERCASE	CHRIS buttons and main menu options are presented in UPPERCASE letters.
Title Case	CHRIS-related reports, event names, functions, and lists (e.g., Duplicate Child Report, Service Coordination, Child Record Locator, Code List) are presented in Title Case.
 IMPORTANT	The IMPORTANT icon is used in the left margin to highlight information essential to the integrity and/or performance of CHRIS Gold.
 NOTE	The NOTE icon is used in the left margin to highlight information that deserves special attention.
	The HANDS-ON icon is used in the left margin to indicate a hands-on exercise for the user to complete.

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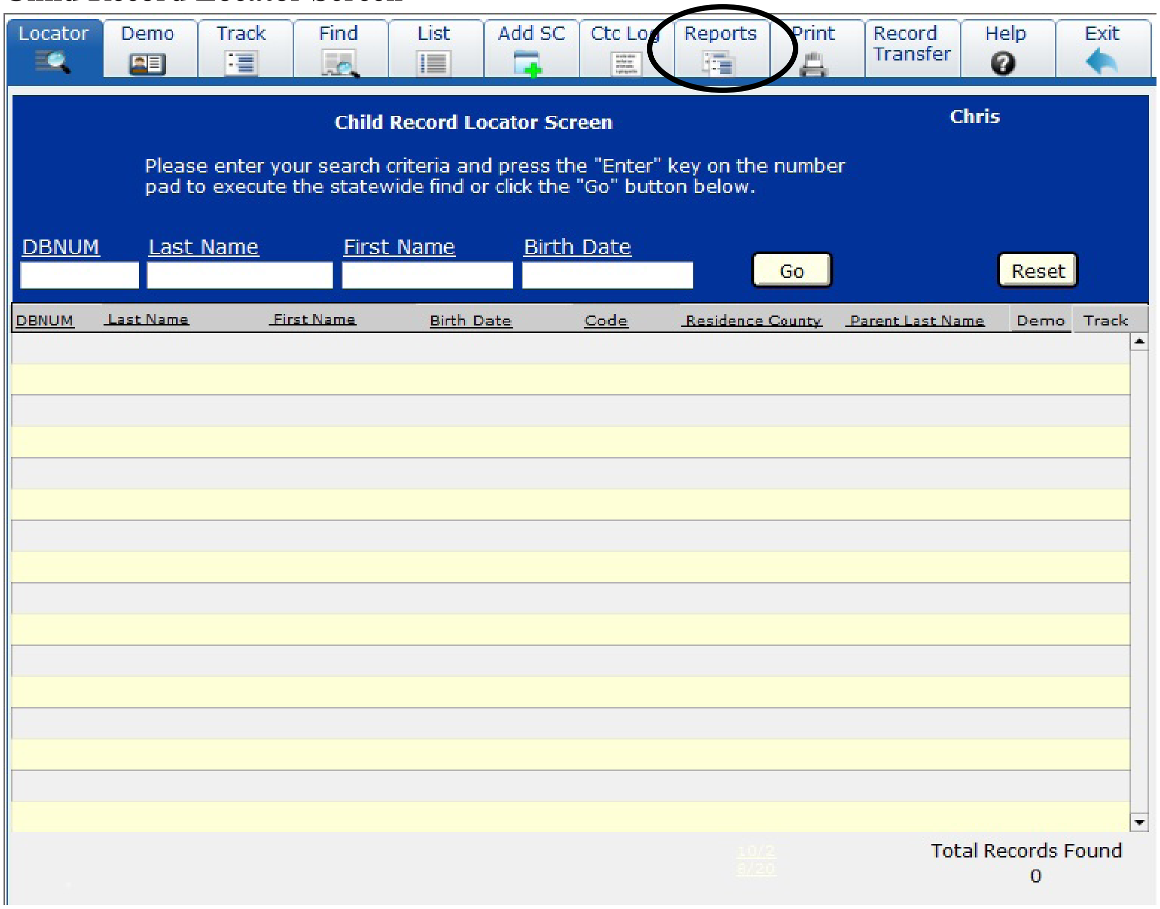
Reports in CHRIS

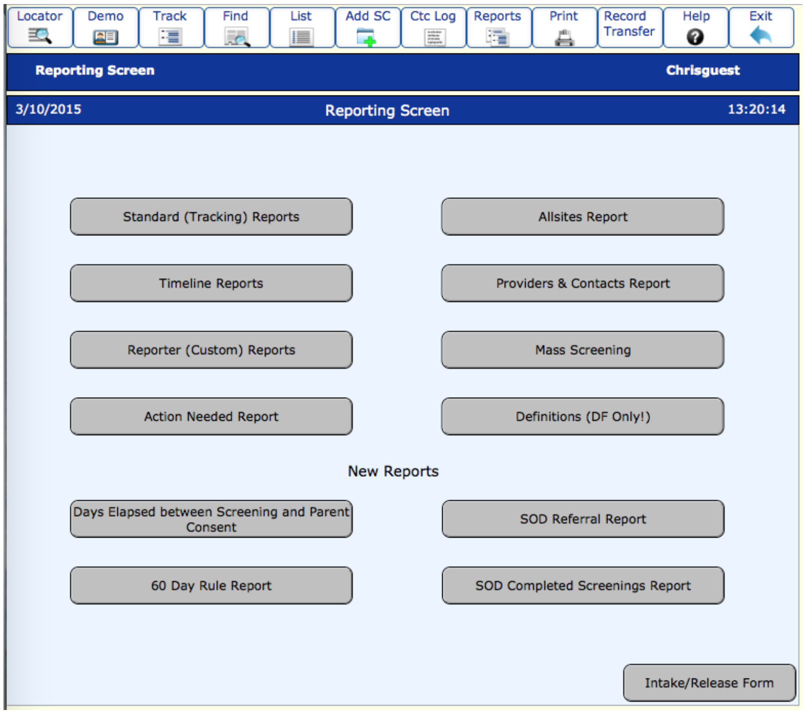
The CHRIS software program contains a variety of standard reports to assist users in creating commonly used reports. In addition, CHRIS also contains a Reporter program that allows users to create custom reports. To access the reporting features in the CHRIS program, click the REPORTS button from the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

FIGURE 1 **Child Record Locator Screen**



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

FIGURE 2 **Reporting Screen**



Options

The following reporting options are described in this manual:

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

NOTE

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

New Reports

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

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

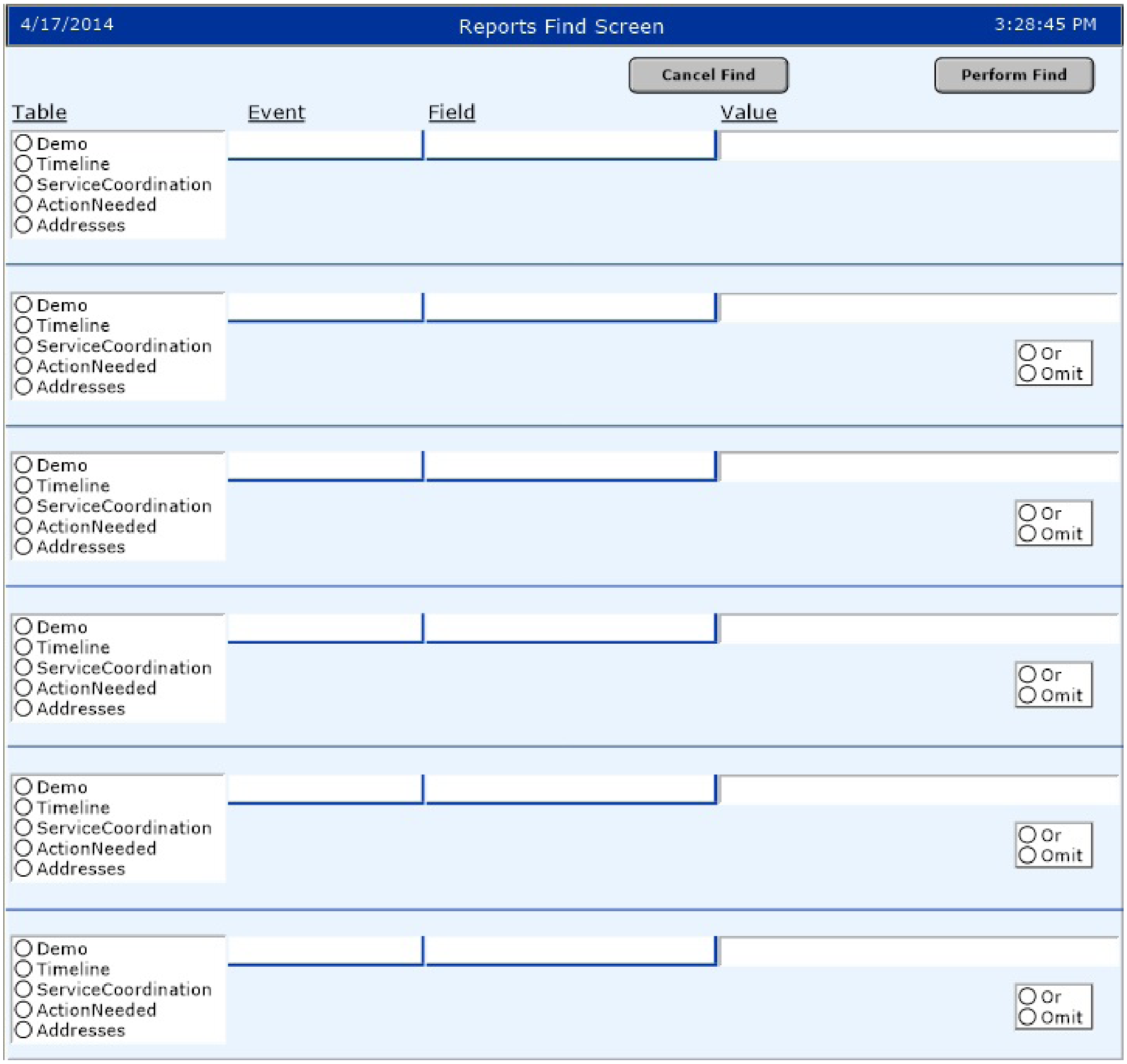
- **SOD REFERRAL REPORT**– (Schedule Of Deliverables Referral Report) Displays the number of children who have a Referral First Contact or Referral In Date within a chosen date range. This report breaks down the results by individual county (if applicable).

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

Reports Find Screen

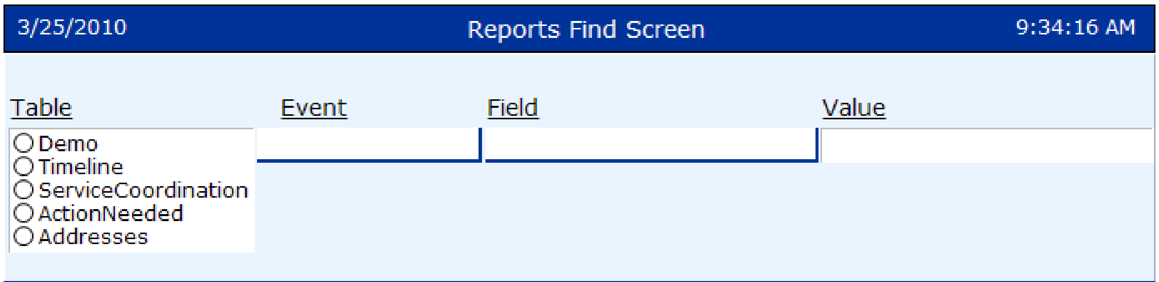
Clicking either the STANDARD (TRACKING) REPORTS button or the REPORTER (CUSTOM) REPORTS button on the **Reporting** screen (see Figure 2) will display the **Reports Find** screen (see Figure 3). The **Reports Find** screen is used to select the data needed to create standard and custom reports for the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

FIGURE 3 **Reports Find Screen**



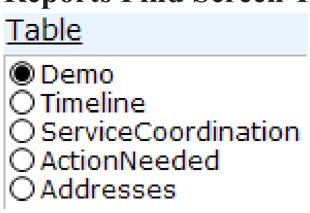
Each section of the **Reports Find** screen allows users to enter search criteria that will be used to find data related to the desired report (see Figure 4).

FIGURE 4 **Reports Find Screen Section**



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

FIGURE 5 **Reports Find Screen Table Field**

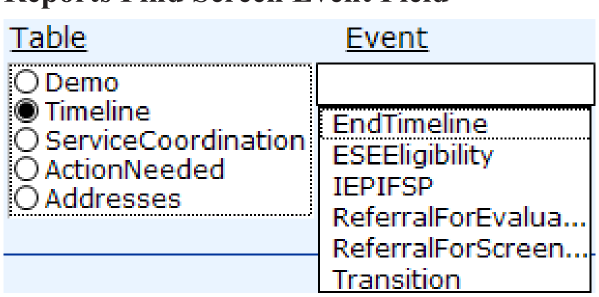


IMPORTANT

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

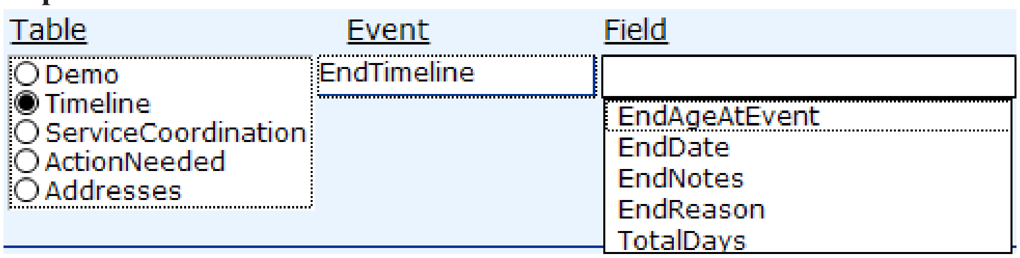
If either Timeline or Service Coordination is selected as the table, the *Event* field will automatically display a list of the events pertaining to the table chosen (see Figure 6). The appropriate event should be selected from the drop-down list. If Demo, Action Needed, or Addresses is selected as the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

FIGURE 6 **Reports Find Screen Event Field**



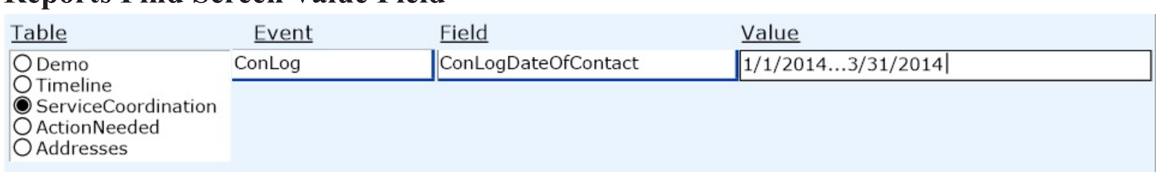
Once a table and an event (if necessary) are chosen, a list of fields unique to the selected table and event selected will automatically be displayed (see Figure 7). The appropriate field should be selected from the drop-down list.

FIGURE 7 **Reports Find Screen Field Field**



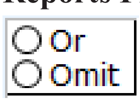
The find criteria are entered into the *Value* field (see Figure 8). For example, a date range would be entered as 01/01/2014...03/31/2014.

FIGURE 8 **Reports Find Screen Value Field**



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

FIGURE 9 **Reports Find Options**



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

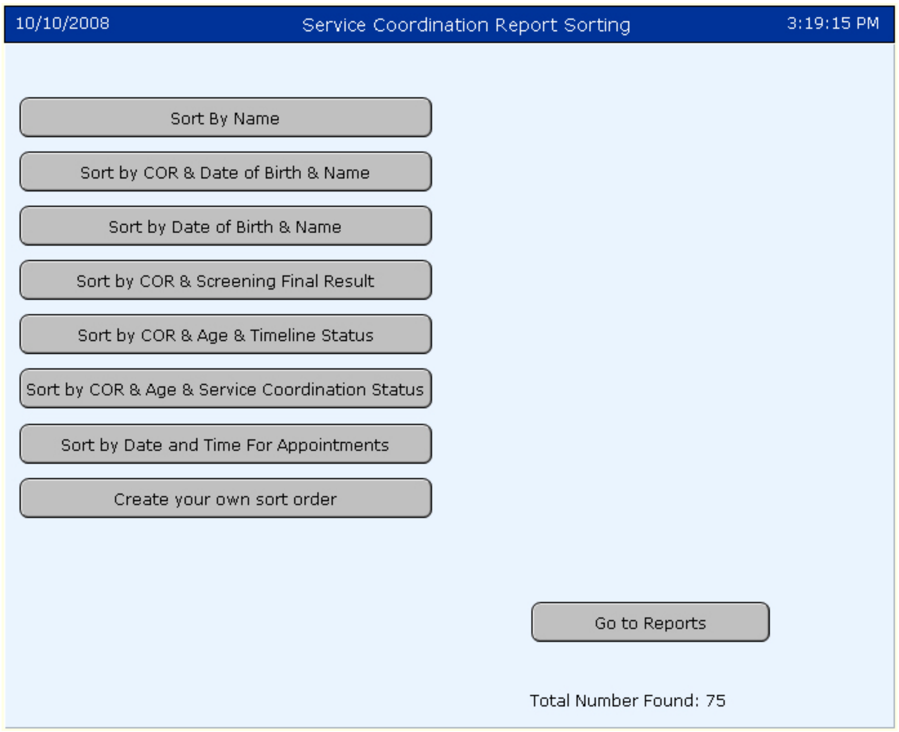
- OR – Includes records that meet the criteria from that section, regardless of the criteria specified in other sections.

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

When find criteria are entered in more than one section, the find functions as an "And" find (results will contain only those records that meet all the criteria specified in all the sections), unless the OR or OMIT option is selected.

After clicking the PERFORM FIND button on the **Reports Find** screen, the **Sorting** screen is displayed (see Figure 10). This screen provides options for sorting the data in the report. Click the button associated with the desired sort option.

FIGURE 10 **Sorting Screen**



NOTE

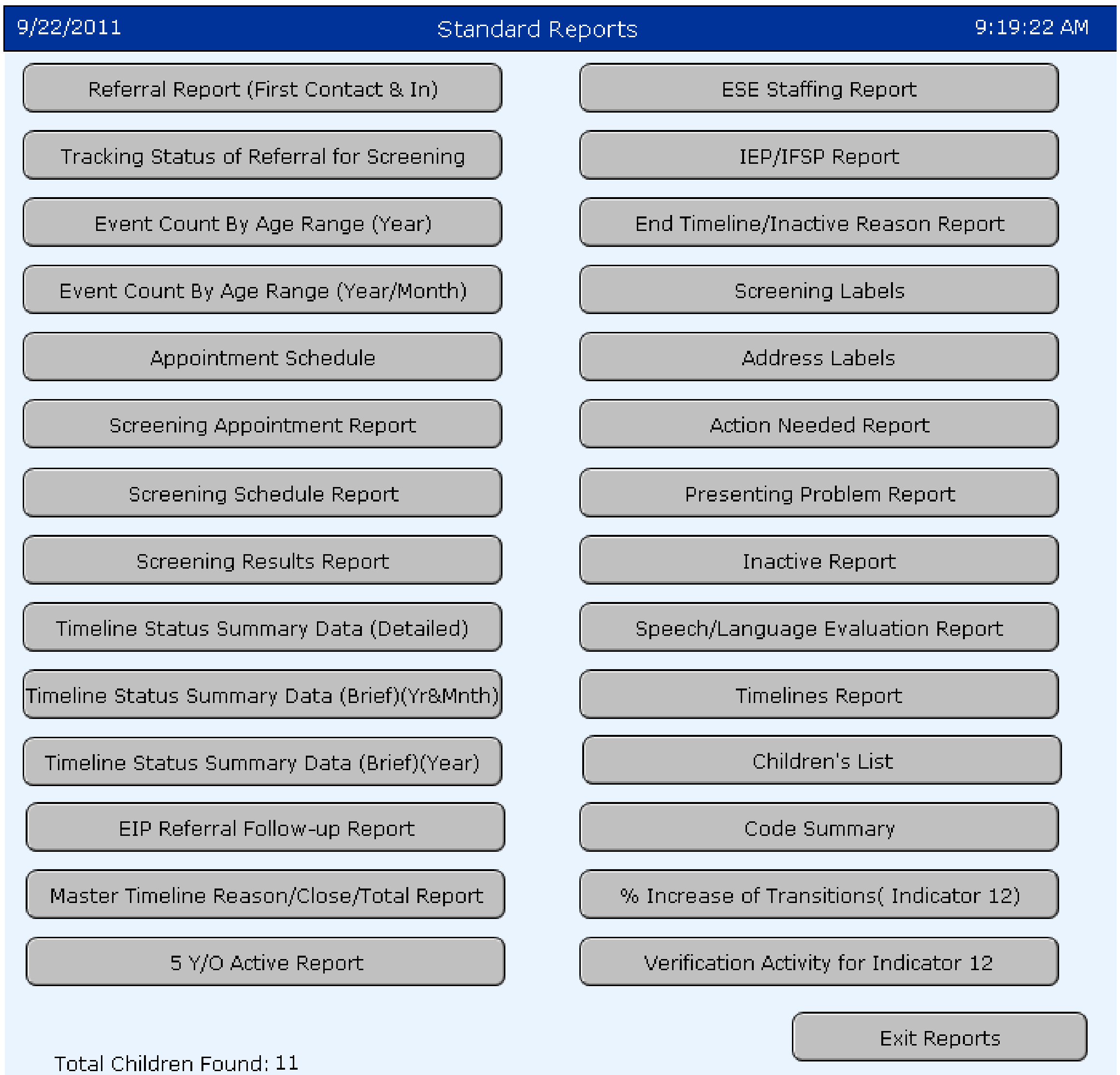
On the Sorting screen, COR refers to County of Residence.

NOTE

The GO TO REPORTS button leaves the records unsorted and takes the user to the **Standard Reports** screen (see Figure 11).

Once the sort option is selected, the **Standard Reports** screen will be displayed (see Figure 11). This screen lists the standard report options available. Click the button to select the desired report.

FIGURE 11 **Standard Reports Screen**



NOTE

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

Performing Accurate Finds

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

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

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

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

Find Operators

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

TABLE 1 **Find Operators Table**

To find values that:	**Use this operator:**	**Example:**
Are less than the value of the item	<	<40 or <09/09/1998
Are less than or equal to the value of the item	<=	<=50
Are greater than the value of the item	>	>10/10/1998
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, and/or Service Coordination data.

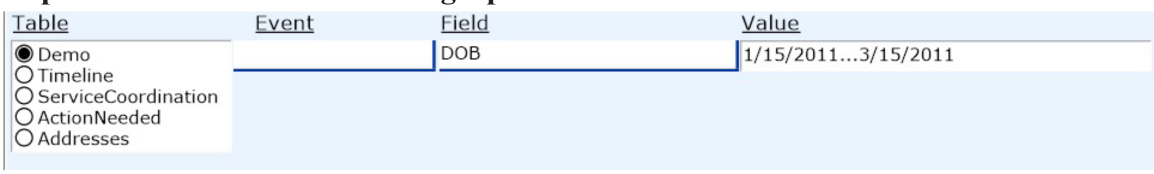
Demographic Reports

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

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

Table: Demo
Event: (bypassed when Demo table is selected)
Field: *DOB*
Value: 01/15/2011...03/15/2011

FIGURE 12 **Reports Find Screen with Demographic Find**



In this example, the found set of records will include children born between January 15, 2011, and March 15, 2011.

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

The demographic reporting options include the following:

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

IMPORTANT

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

NOTE

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

Hands-on Exercise 1: Running a Demographic Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the DEMO option.
4. Select the *DOB* field from the drop-down list.
5. Enter the following information:
   DOB: 6/2011
6. Click the PERFORM FIND button.
7. Click the SORT BY NAME button.
8. Click the CHILDREN'S LIST button.
9. Select FILE from the FileMaker Menu.
10. Select the EXIT REPORT option.

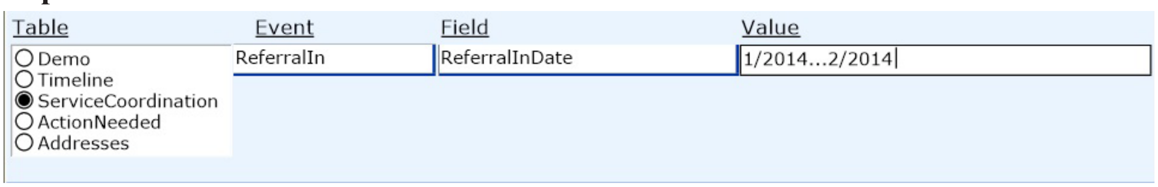
Basic Reports

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

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

Table: ServiceCoordination
Event: ReferralIn
Field: *ReferralInDate*
Value: 1/2014...2/2014

FIGURE 13 **Reports Find Screen with Basic Find**



In this example, the found set of records will include children with a *Referral In Date* during the months of January and February 2014.

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

Hands-on Exercise 2: Running a Basic Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the SERVICE COORDINATION option.
4. Select Appointments from the event drop-down list.
5. Select *ApptDate* from the field drop-down list.
6. Enter the following information:
   Appt Date: 1/2014…3/2014
7. Click the PERFORM FIND button.
8. Click the SORT BY DATE AND TIME FOR APPOINTMENTS button.
9. Click the APPOINTMENT SCHEDULE button.
10. Scroll to the bottom to make a note of the number of records found.
11. Click the OMIT END TIMELINE button.
12. Click the OMIT REF INACTIVE button.
13. Select FILE from the FileMaker Menu.
14. Select the EXIT REPORT option.

Complex Reports

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

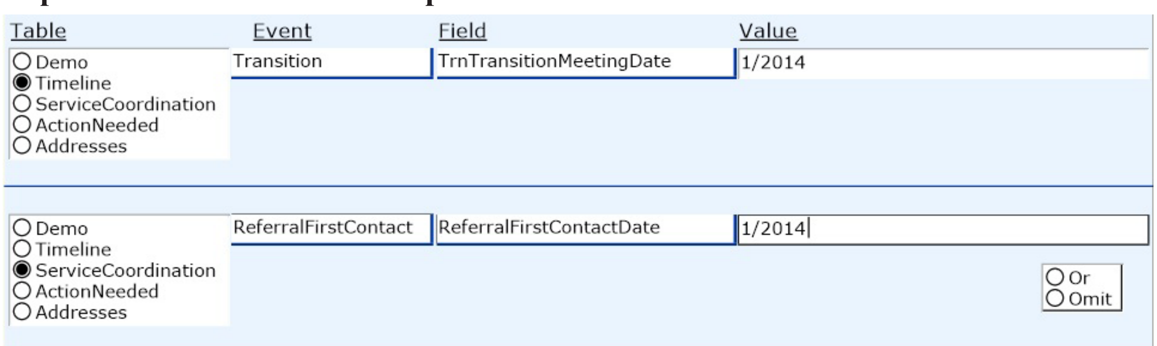
The following data are entered for the first section of the **Reports Find** screen:

Table: Timeline
Event: Transition
Field: *TrnTransitionMeetingDate*
Value: 1/2014

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

Table: ServiceCoordination
Event: ReferralFirstContact
Field: *ReferralFirstContactDate*
Value: 1/2014

FIGURE 14 **Reports Find Screen with Complex Find**



In this example, the found set of records will include children who had both a *Transition Meeting Date* and a *Referral First Contact Date* in January 2014.

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

NOTE

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

Reports with an Or Find

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

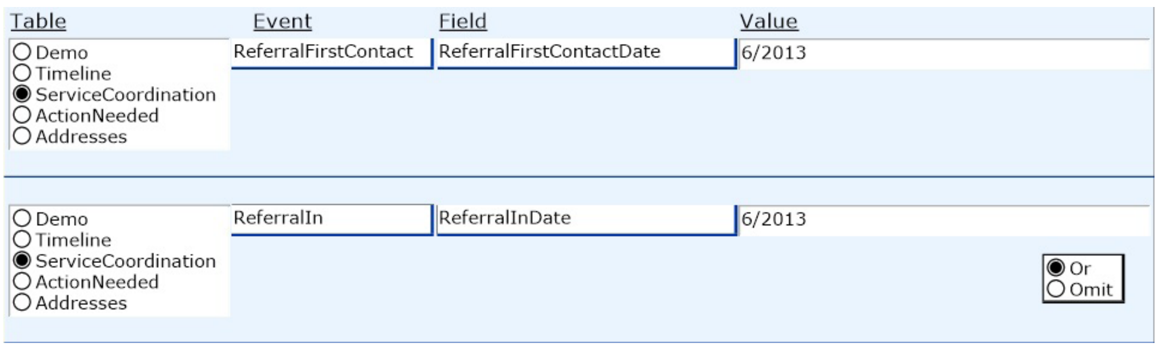
The following data are entered for the first section of the **Reports Find** screen:

Table: ServiceCoordination
Event: ReferralFirstContact
Field: *ReferralFirstContactDate*
Value: 6/2013

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

Table: ServiceCoordination
Event: ReferralIn
Field: *ReferralInDate*
Value: 6/2013
Option: Or

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



In this example, the found set of records will include children who had either a *Referral First Contact Date* or a *Referral In Date* in June 2013.

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

Reports with an Omit Request

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

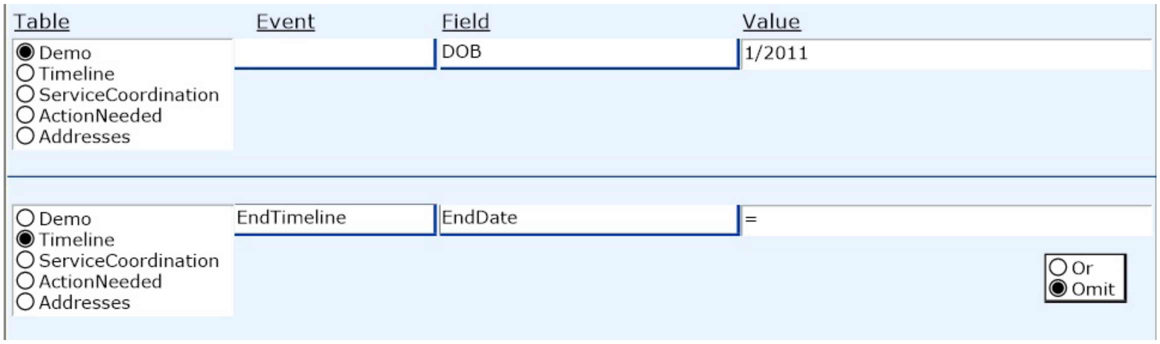
The following data are entered for the first section of the **Reports Find** screen:

Table: Demo
Event: (bypassed when Demo table is selected)
Field: *DOB*
Value: 1/2011

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

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

FIGURE 16 **Reports Find Screen with Omit Request**



In this example, the found set of records will contain data from the first section of the **Reports Find** screen and omit the data from the second section of the **Reports Find** screen. In this example, the find would result in a list of children born in January 2011 with a completed Timeline.

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

Hands-on Exercise 3: Running a Complex Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the TIMELINE option.
4. Select End Timeline from the event drop-down list.
5. Select *EndDate* from the field drop-down list.
6. Type the following information:
   EndDate: 1/2014
7. Click the SERVICE COORDINATION button in the next section.
8. Select Referral Inactive from the event drop-down list.
9. Select *ReferralInactiveDate* from the field drop-down list.
10. Type the following information:
    Referral Inactive: 1/2014
11. Click the OR button.
12. Click the PERFORM FIND button.
13. Click the SORT BY NAME button.
14. Click the END TIMELINE/INACTIVE REASON REPORT button.
13. Select FILE from the FileMaker Menu.
14. Select the EXIT REPORT option.

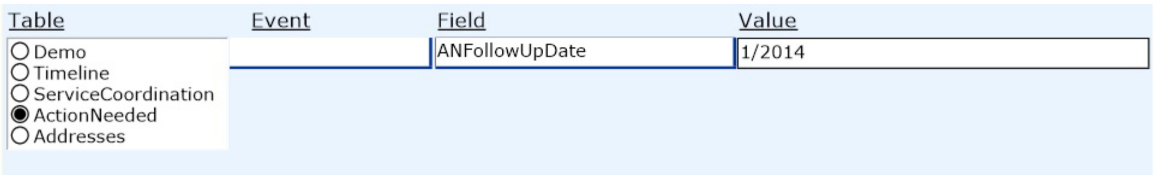
Action Needed Report

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

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

Table: ActionNeeded
Event: (bypassed when ActionNeeded table is selected)
Field: *ANFollowUpDate*
Value: 1/2014

FIGURE 17 **Reports Find Screen Action Needed Find**



In this example, the found set of records would include children who had an *Action Needed Follow Up Date* during the month of January 2014.

After the find has been performed, select the sort option (see Figure 10) and then the ACTION NEEDED REPORT button (see Figure 11).

Hands-on Exercise 4: Running an Action Needed Report

1. Select the REPORTS option from the main menu.
2. Click the STANDARD (TRACKING) REPORTS button.
3. Select the ACTION NEEDED option.
4. Select *ANCompletedDate* from the field drop-down list.
5. Enter the following information:
   ActionNeededCompDate: 1/2014
6. Click the PERFORM FIND button.
7. Click the SORT BY NAME button.
8. Click the ACTION NEEDED REPORT button.
9. Select FILE from the FileMaker Menu.
10. Select the EXIT REPORT option.

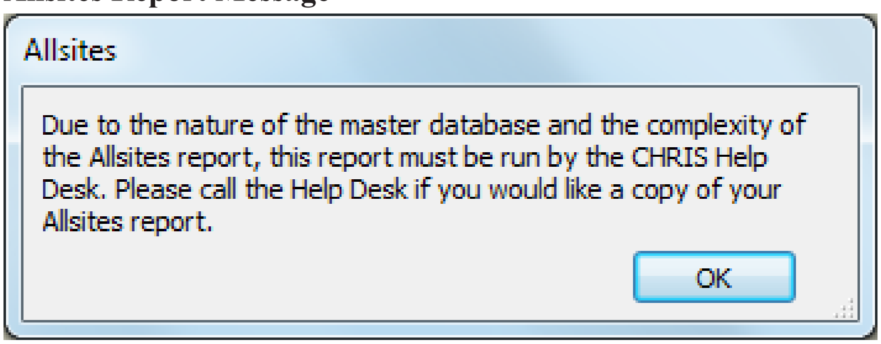
Allsites Report

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

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

Due to the complexity of these reports, only the CHRIS Help Desk can generate Allsites Reports. If a user clicks the ALLSITES REPORT button from the **Reporting** screen, a message will be displayed indicating that this report must be run by the Help Desk (see Figure 18). The data facilitator is responsible for contacting the Help Desk to request an Allsites Report.

FIGURE 18 **Allsites Report Message**



Workload Report

The Workload Report is based on a set of seven events. This includes the total number of Referral First Contact with FDLRS (*First Contact with FDLRS Date*), Referral In (*Referral In Date*), Transition (*Part C to Part B Transition Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individal Education Plan/Individual Family Service Plan (*IEP/IFSP Date*) events for each school year (see Figure 19).

Allsites Workload Report

FIGURE 19

Center Comparative 3 Year Workload Report

Report Date: 03/10/15

Report Time: 3:40:20 PM

Sum Of Count		Month												
Category	**Year**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Grand Total**
First Contact	12 / 13	212	240	264	385	260	192	274	270	194	272	219	136	2918
First Contact	13 / 14	194	234	226	296	251	175	241	266	260	236	238	150	2767
First Contact	14 / 15	169	205	259	254	206	144	259	240	59	-	-	-	1795
First Contact	**Total**	575	679	749	935	717	511	774	776	513	508	457	286	7480
Referral In	12 / 13	16	17	19	22	31	14	27	22	18	28	15	15	244
Referral In	13 / 14	12	15	22	19	17	17	27	31	22	20	20	18	240
Referral In	14 / 15	21	25	24	28	17	18	25	29	-	-	-	-	196
Referral In	**Total**	49	57	65	69	65	49	79	82	49	48	35	33	680
Transition	12 / 13	-	21	48	78	61	44	42	76	53	73	85	58	646
Transition	13 / 14	38	40	68	68	57	55	48	59	54	84	86	28	685
Transition	14 / 15	32	31	41	60	49	29	32	18	-	-	-	-	302
Transition	**Total**	77	92	157	206	167	128	122	153	117	157	171	86	1633
Screening	12 / 13	66	67	219	311	232	130	217	214	199	283	183	50	2171
Screening	13 / 14	36	93	225	283	254	154	192	274	239	211	237	174	2372
Screening	14 / 15	138	65	137	233	136	161	186	172	19	-	-	-	1247
Screening	**Total**	240	225	581	827	622	445	595	660	457	494	420	224	5790
Evaluation	12 / 13	81	50	156	207	169	127	163	175	143	214	180	60	1725
Evaluation	13 / 14	38	98	187	194	184	124	186	185	161	219	211	95	1882
Evaluation	14 / 15	113	80	183	190	127	128	154	96	-	-	-	-	1074
Evaluation	**Total**	232	228	526	591	480	379	503	456	307	433	391	155	4681
ESE Eligibility	12 / 13	31	59	130	171	171	155	143	175	163	189	218	116	1721
ESE Eligibility	13 / 14	41	70	147	212	146	143	168	185	155	213	220	133	1833
ESE Eligibility	14 / 15	100	96	163	178	140	123	160	142	49	-	-	-	1151
ESE Eligibility	**Total**	172	225	440	561	457	421	471	502	367	402	438	249	4705
IEP/IFSP	12 / 13	29	54	112	159	161	138	127	153	145	171	200	104	1553
IEP/IFSP	13 / 14	38	63	123	188	130	136	151	160	140	194	206	120	1649
IEP/IFSP	14 / 15	89	84	147	164	131	111	141	126	44	-	-	-	1037
IEP/IFSP	**Total**	156	201	382	511	422	385	419	439	329	365	406	224	4239

Records Transferred In During School Year: 14/15 35

Records Transferred Out During School Year: 14/15 27

Unduplicated Report

The Unduplicated Report is based on the number of children served and contains the total number of children who have a Referral First Contact with FDLRS (*First Contact with FDLRS Date*), Transition (*Part C to Part B Transition Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individal Education Plan/Individual Family Service Plan (*IEP/IFSP Date*) event for each school year (see Figure 20).

Allsites Unduplicated Report

FIGURE 20

C·H·R·I·S

Center Comparative 3 Year Unduplicated Report

Report Date: 03/10/15
Report Time: 3:29:29 PM

Sum Of Count		Month												
Category	**Year**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Grand Total**
First Contact	12 / 13	212	240	264	385	260	192	274	270	194	272	219	136	2918
First Contact	13 / 14	194	234	226	296	251	175	241	266	260	236	238	150	2767
First Contact	14 / 15	169	205	259	254	206	144	259	240	66	-	-	-	1802
First Contact	**Total**	575	679	749	935	717	511	774	776	520	508	457	286	7487
Transition	12 / 13	-	21	48	78	61	44	42	76	53	73	85	58	646
Transition	13 / 14	38	40	68	68	57	55	48	59	54	84	86	28	685
Transition	14 / 15	32	31	41	60	49	29	33	18	11	-	-	-	304
Transition	**Total**	77	92	157	206	167	128	123	153	118	157	171	86	1635
Screening	12 / 13	64	67	218	310	231	129	218	218	198	286	194	57	2190
Screening	13 / 14	36	94	225	283	253	154	193	276	239	210	237	174	2374
Screening	14 / 15	138	65	137	233	136	163	186	174	31	-	-	-	1263
Screening	**Total**	238	226	580	826	620	446	597	668	468	496	431	231	5827
Evaluation	12 / 13	77	51	156	207	168	127	163	176	141	214	183	59	1722
Evaluation	13 / 14	38	98	187	195	184	124	186	185	161	220	211	95	1884
Evaluation	14 / 15	113	80	183	190	127	128	154	99	-	-	-	-	1077
Evaluation	**Total**	228	229	526	592	479	379	503	460	305	434	394	154	4683
ESE Eligibility	12 / 13	32	59	131	171	169	155	143	175	162	188	219	116	1720
ESE Eligibility	13 / 14	41	70	147	212	147	143	168	185	155	213	221	133	1835
ESE Eligibility	14 / 15	100	96	163	178	140	123	160	142	54	-	-	-	1156
ESE Eligibility	**Total**	173	225	441	561	456	421	471	502	371	401	440	249	4711
IEP/IFSP	12 / 13	30	54	113	159	160	138	127	153	144	171	200	104	1553
IEP/IFSP	13 / 14	38	63	123	188	131	136	151	160	140	194	206	120	1650
IEP/IFSP	14 / 15	89	84	147	164	131	111	141	126	49	-	-	-	1042
IEP/IFSP	**Total**	157	201	383	511	422	385	419	439	333	365	406	224	4245

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

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

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

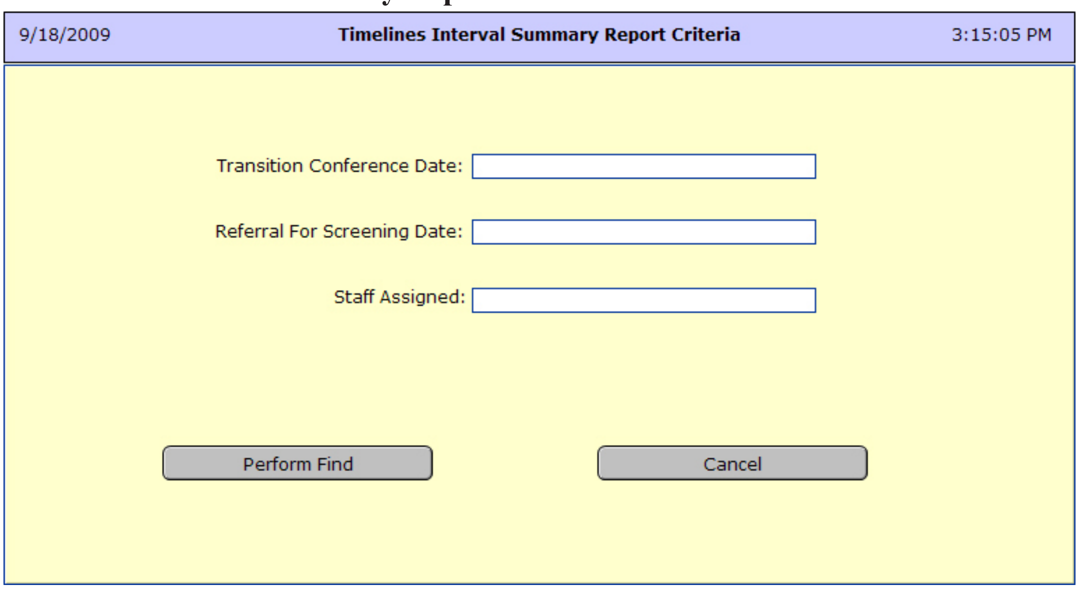
Timeline Reports

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

NOTE

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

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



To run a Timeline report, complete the following steps:

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

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

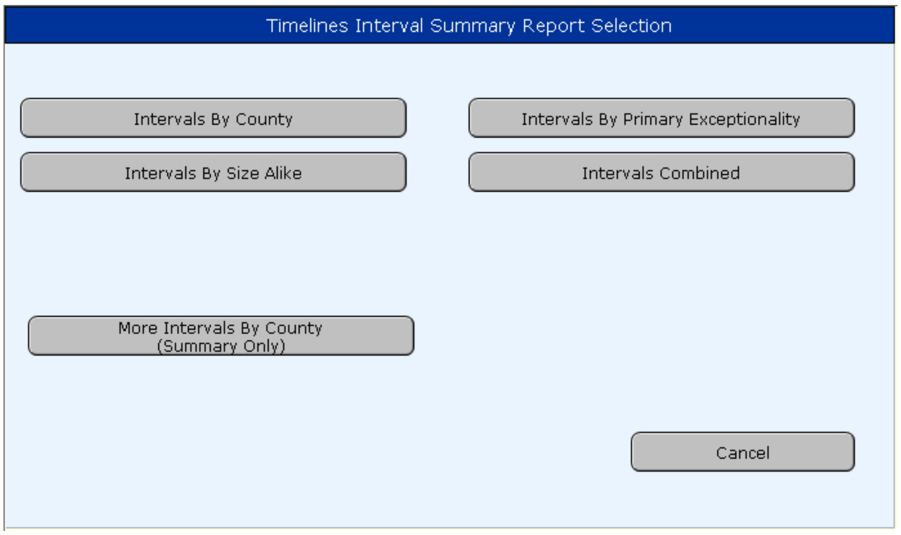
NOTE

Clicking the CANCEL button will return you to the **Reporting** screen.

Step 3. Enter the *Transition Conference Date, Referral for Screening Date,* and/or *Staff Assigned*.

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

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



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

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

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

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

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

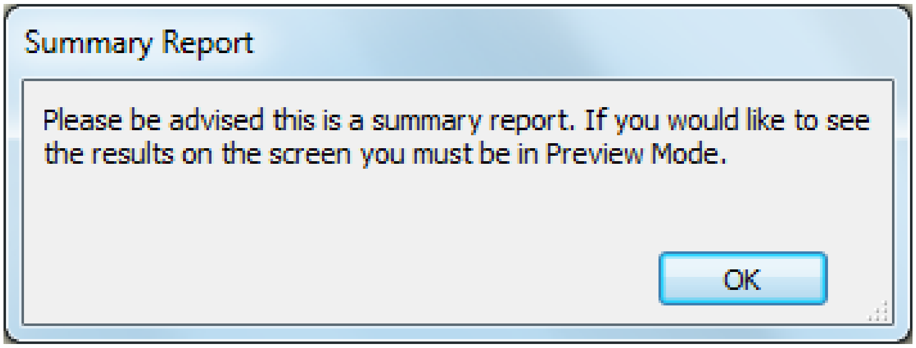
- MORE INTERVALS BY COUNTY (SUMMARY ONLY) – Displays the number of completed timelines by county name along with additional timeline detail.

NOTE

Clicking the CANCEL button will return you to the **Reporting** screen.

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

FIGURE 23 **Timelines Interval Preview Warning**



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

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

FDLRS Site Name
Street
City, State Zip Code
Report Date: 05/06/14
Report Time: 12:24:56 PM

Timelines Interval Summary Report By County Of Residence

County Of Residence	1 to 45	46 to 60	61 to 90	91 to 120	Greater Than 120
Sample	49	30	70	30	10

Hands-on Exercise 5: Running Timeline Reports

1. Select the REPORTS option from the main menu.
2. Click the TIMELINE REPORTS button.
3. Enter the following information:
   Referral For Screening Date: 7/1/2013…1/1/2014
4. Click the PERFORM FIND button.
5. Click the INTERVALS BY COUNTY button.
6. Click the OK button.
7. Select FILE from the FileMaker Menu.
8. Select the BACK TO REPORTS option.
9. Select another Timeline Interval Report (if desired).
10. Click the OK button.
11. Select FILE from the FileMaker Menu.
12. Select the EXIT REPORTS option.

Providers & Contacts Reports

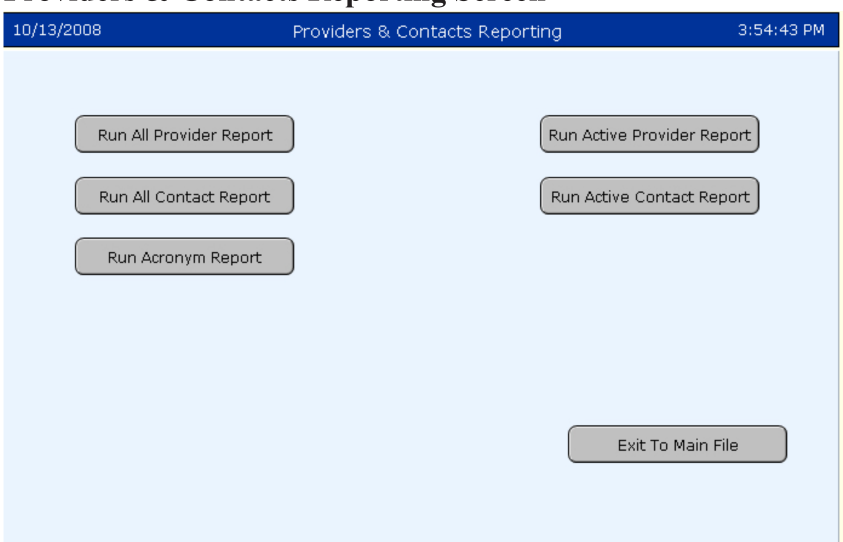
The Providers & Contacts Reports include listings of the provider and contact personnel who work with an individual FDLRS site.

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

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

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

FIGURE 25 **Providers & Contacts Reporting Screen**



Step 3. Select one of the following report options:

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

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

Custom Reports

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

Reporter

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

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