



Children's Registry and Information System Field Reference Guide

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 provide definitions for all fields in the Children's Registry and Information System (CHRIS) data entry screens.

For additional information on the CHRIS Project, refer to the *User Manual*, *Reports Manual*, and *Data Facilitator Manual*. 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.

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Department of Education
2026

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Legend

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



Free text field



Automatically calculated field



State-defined drop-down list



Locally defined drop-down list



Display only field



Button option



Checkbox field



Radio button

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Main Menu Options

The main menu is located on the top of all of the screens in the Children's Registry and Information System (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 (this document) 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 CHRIS.

Record Locator Screen

After a successful login to CHRIS, the **Record Locator** screen is displayed. 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 the Advanced Search Options are expanded, additional fields are available to further narrow the Record Locator search criteria.

Screen Field Name	Actual Field Name	Field Description
♦ DBNUM	<i>Dbnum</i>	The number that is automatically assigned to the child's record at the time the record is entered into the system. This value is unique within each site.
♦ Last Name	<i>LastName</i>	The child's last name.
♦ First Name	<i>FirstName</i>	The child's first name.
♦ Birth Date Range (From)	<i>DOB</i>	Beginning of a date range used for a search.
♦ Birth Date Range (To)	<i>DOB</i>	End of a date range used for a search.
♦ SA First Name	<i>AdultFirstName</i>	The first name of the significant adult (SA).
♦ SA Last Name	<i>AdultLastName</i>	The last name of the significant adult (SA).

- ♦ Free text field
- ⚡ Automatically calculated field
- State-defined drop-down list
- ▲ Locally defined drop-down list
- ♥ Display only field
- ♣ Button option
- Check box field
- ⊕ Radio button

Screen Field Name	Actual Field Name	Field Description
♦ SA Physical Address	<i>AdultPermStreet, AdultPermCity, ▲ AdultPermState, AdultPermZip</i>	The physical street address of the significant adult (SA). Includes house number, street name, apartment number, box number, or other information required for mailing. The City name is selected from a drop-down list. Address, State, and Zip Code are free text fields.
♦ SA Mailing Address	<i>AdultStreet, AdultCity, ▲ AdultState, AdultZip</i>	The mailing address of the significant adult (SA). Includes house number, street name, apartment number, box number, or other information required for mailing. The City name is selected from a drop-down list. Address, State, and Zip Code are free text fields.
♦ SA Phone 1	<i>AdultPhone1</i>	The telephone number, including area code, for the significant adult (SA).
♦ SA Phone 2	<i>AdultPhone2</i>	The telephone number, including area code, for the significant adult (SA).
♦ SA Phone 3	<i>AdultPhone3</i>	The telephone number, including area code, for the significant adult (SA).
♦ SA Email	<i>AdultEmail</i>	The email address for the significant adult (SA).
▲ Staff Assigned	<i>StaffAssignedFull-Name</i>	The name of the staff person assigned to coordinate services for the child.
▲ Home School Zone	<i>HomeZonedSchool</i>	The district-designated attendance zone for the child.
♦ Appointment Date	<i>ApptDate</i>	The date the appointment was scheduled to occur. This date is entered at the time the event is created. It can be edited on the detail screen.
♦ Student Number	<i>StudentNumber</i>	The district-designated student ID for the child (10-digit number).
♣ Clear		Clears find criteria and returns to blank Record Locator screen.
♣ Search		Performs find in state-wide database using find criteria entered.

♦ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Found Set Display Screen

When a found set of records has been located, additional display options, record access options, and sort options become available.

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	05/17/2021		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			
512903	Asi	Aor	07/20/2017	P	Levy	Levy	Asi				
517411	Asi	Aal	03/12/2017	254	Orange	Orange		ET			
519802	Asi	Aji	11/27/2017	Blue Team	Lee	Lee	Ebu	ET			
532027	Asi	Ave	05/16/2016		Archived	Archived	Asi	ET			
533999	Asi	Ael	01/13/2016		Archived	Archived	Zpe	ET			
536299	Asi	Ada	11/12/2016	TrESE-N	Archived	Archived	Sca	ET			
540268	Asi	Abh	10/31/2016		Archived	Archived	Dsh	ET			
548100	Asi	Ada	01/08/2016	Parent	Archived	Archived	Asi	EV			
550279	Asi	Aal	01/09/2017	Parent	St. Lucie	St. Lucie	Asi	ET			
553348	Asi	Aal	01/11/2019		Nassau	Nassau	Asi				

20 ▾

1 2 3 >

- ◆ Free text field
- ⚙ Automatically calculated field
- State-defined drop-down list
- ▲ Locally defined drop-down list
- ♥ Display only field
- ♣ Button option
- Check box field
- ⊕ Radio button

Screen Field Name	Actual Field Name	Field Description
♦ DBNUM	<i>Dbnum</i>	The number that is automatically assigned to the child's record at the time the record is entered into the system. This value is unique within each site.
♦ Last Name	<i>LastName</i>	The child's last name.
♦ First Name	<i>FirstName</i>	The child's first name.
♦ Birth Date	<i>DOB</i>	The child's date of birth as verified by a birth record.
♥ Code	<i>Code</i>	The use of this field is locally defined.
♥ Residence County	<i>CountyOfResidence</i>	The county where the child lives. "Archived" indicates the child is seven years old or older with no Service Coordination activity within the prior school year. Contact the Help Desk to reinstate the child to their pre-archived County of Residence.
♥ District	<i>District</i>	The child's school district.
♥ Sig Adult Last Name	<i>AdultLastName</i>	The last name of the primary significant adult.
♥ Timeline Status	<i>TimelineStatus</i>	The most recent Timeline event in the child's record.
♣ COS	<i>N/A</i>	This icon will appear when the user has access to the Child Outcomes Summary Process Form (COS). Access is based on School District. The COS screen for the current child will be displayed.
♣ Demo	<i>N/A</i>	 Record Transfer required to view Demographics Screen.  Displays current child's Demographics Screen.
♣ Track	<i>N/A</i>	 Record Transfer required to view Tracking Summary Screen.  Displays current child's Tracking Summary Screen.

♦ Free text field ♠ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Add New Child Screen

Adding a child’s record is a process that must be completed from the **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 **Add New Child** screen will become available.

Add New Child

Last Name:

Smith

Date of Birth:

10/10/2021

Residence County:

-- Select --

Referral Reason:

First Name:

John

Sex:

-- Select --

Referral First Contact Date:

MM/DD/YYYY

Middle Name:

Social Security Number:

Cancel

+ Add Child

Screen Field Name	Actual Field Name	Field Description
♦ Last Name	<i>LastName</i>	The child's last name. This field is required to create a child's record.
♦ First Name	<i>FirstName</i>	The child's first name. This field is required to create a child's record.
♦ Middle Name	<i>MiddleName</i>	The child's middle name.
♦ Date of Birth	<i>DOB</i>	The child's date of birth as verified by a birth record. This field is required to create a child's record.
• Sex	<i>Sex</i>	The child's gender. This field is required to create a child's record. Drop-down options include the following: • <u>M</u>: Male • <u>F</u>: Female • <u>Unknown</u>
♦ Social Security Number	<i>SSN</i>	The child's Social Security Number.
• Residence County	<i>CountyOfResidence</i>	The county where the child lives. Drop-down options include all counties associated with the user's site.
♦ Referral First Contact Date	<i>ReferralFirstContactDate</i>	The very first date that the child became known or was referred. This date documents the first contact regarding the child.
♦ Referral Reason	<i>ReferralFirstContactReason</i>	Reason the child was initially referred.
♣ Cancel	<i>N/A</i>	Cancels process and returns to Found Set Display Screen.
♣ Add Child	<i>N/A</i>	Adds child to database and displays the Demographics Screen.

Demographics Screen

The **Demographics** screen contains demographic information pertaining to the individual child whose record is being viewed.

The top gray section of the screen offers the option to access the Locator Junior screen by clicking on the magnifying glass link. The current child's full name is an active link that navigates to the Demographics screen. This section also displays the current child's DBNum, Child ID, Age, and DOB. The name of the person who created this child's record (Record Creator) and the current active CHRIS user are also displayed.

The General tab displays the current child's demographic information.

The Significant Adults tab displays information about parents or other significant adults associated with the current child.

The Other Adults tab displays information about other adults associated with the current child.

The Critical Info tab displays any information of a critical nature that needs to be considered when working with the child or family. The field label automatically changes to red if there is information entered in this field.

Hjk, Bls DBNUM: 669453 Child ID: 669453.29 Age: 3.00 Record Creator: chrispinellas DOB: 02/01/2023 chrispinellas

Demographics Tracking Forms Print Transfer

General

- Significant Adults
- Other Adults
- Critical Info

Timeline Status: EF **Staff Assigned:** ADAPT South Saved

Last Name Hjk	Suffix -- Select --	First Name Bls
Middle Name	Relation -- Select --	Birth Date 02/01/2023
Sex M	Alternate Surname	Nickname
Birth (State/Country) Florida AAFlorida	Birth (County) Pinellas	Home School Zone -- Select --
Residence County ⓘ Pinellas	Service County -- Select --	Current Location Phone conference
Primary Language English	Other Language Creole	Current Sub Location -- Select --
Student Number 123456789	Migrant No	Ethnicity (Hispanic) ☐ Yes ☒ No
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		

Screen Field Name	Actual Field Name	Field Description
  >	N/A	Navigates to the Locator Junior Screen.
 Child Name (Blue Link)	N/A	Child's full name. Clicking the link navigates to the Demographics screen.
 DBNUM	N/A	The number that is automatically assigned to the child's record at the time the record is entered into the system. This value is unique within each site.
 Child ID	N/A	The combination of DBNum and CHRIS Site ID number.
 Age	N/A	Child's current age.
 Record Creator	N/A	CHRIS user who initially created the child's record.
 DOB	N/A	The child's date of birth as verified by a birth record.
 Current User	N/A	The CHRIS user currently logged in.
 Demographics	N/A	Displays child's General Demographics Information.
 Tracking	N/A	Displays child's General Tracking Summary Information.
 Forms	N/A	Displays current user's custom forms and letters. (For more information see User Manual.)
 Print	N/A	Downloads a PDF document of the current child's demographic summary, tracking summary, and/or a detailed report of all demographic and tracking information. (For more information see User Manual.)
 Transfer	N/A	Allows Data Facilitators to move a child's record to a different Florida county. (For more information, see Data Facilitator Manual)
 General	N/A	Displays current child's demographic information.
 Significant Adults	N/A	Displays Significant Adult or parent records associated with current child.
 Other Adults	N/A	Displays additional Significant Adult Information

 Free text field
  Automatically calculated field
  State-defined drop-down list
  Locally defined drop-down list
 Display only field
  Button option
  Check box field
  Radio button

Screen Field Name	Actual Field Name	Field Description
♣ Critical Info	N/A	Displays any information of a critical nature that needs to be considered when working with the child or family but that should not be part of the open record. This might include sensitive information, such as whether the child is in protective custody. The field label automatically changes to red if there is information entered in this field.
🔹 Timeline Status	<i>TimelineStatus</i>	The most recent Timeline event in the child's record.
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.

General Demographic Information

🔍 > [Hjk.Bls](#) DBNUM: 669453 Child ID: 669453.29 Age: 3.00 Record Creator: chrispinellas DOB: 02/01/2023 chrispinellas

📄 Demographics 📅 Tracking 📄 Forms 🖨️ Print 🔄 Transfer

✎ General

👤 Significant Adults

👤 Other Adults

❗ Critical Info

Timeline Status: EF Staff Assigned: ADAPT South 💾 Saved

Last Name Hjk	Suffix -- Select --	First Name Bls
Middle Name	Relation -- Select --	Birth Date 02/01/2023
Sex M	Alternate Surname	Nickname
Birth (State/Country) Florida AAFlorida	Birth (County) Pinellas	Home School Zone -- Select --
Residence County Pinellas	Service County -- Select --	Current Location Phone conference
Primary Language English	Other Language Creole	Current Sub Location -- Select --
Student Number 123456789	Migrant No	Ethnicity (Hispanic) ☐ Yes ☒ No
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		

- ♦ Free text field 🔹 Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
♦ Last Name	<i>LastName</i>	The child's last name.
• Suffix	<i>Suffix</i>	Any suffix added to the child's legal name. Drop-down options include the following: • <u>Jr.</u> • <u>II</u> • <u>III</u> • <u>IV</u>
♦ First Name	<i>FirstName</i>	The child's first name.
♦ Middle Name	<i>MiddleName</i>	The child's middle name.
• Relation	<i>Relation</i>	The child's relationship to another child in CHRIS. Drop-down options include the following: • <u>Sibling</u> • <u>Twin</u> • <u>Triplet</u>
♦ Birth Date	<i>DOB</i>	The child's date of birth as verified by a birth record.
• Sex	<i>Sex</i>	The child's gender. Drop-down options include the following: • <u>M</u>: Male • <u>F</u>: Female • <u>Unknown</u>
♦ Alternate Surname	<i>AlternateSurname</i>	Any other legal surname the child has been known by, such as a child's surname prior to adoption.
♦ Nickname	<i>Nickname</i>	Any name other than the legal name that the child is commonly called by or answers to, such as Junior, Bubba, Sissy, Tinker, or shortened versions or alterations of a legal name, such as Maggie, Peggy, or Meg for Margaret; Ricky, Richy, Dick, or Rich for Richard.
• Birth (State/ Country)	<i>BirthStateCountry</i>	The state the child was born in if in the United States, or the country of the child's birth if outside the United States. Drop-down options include all states and countries.

Screen Field Name	Actual Field Name	Field Description
● Birth (County)	<i>BirthCounty</i>	The Florida county of the child's birth. This field is completed for children born in Florida. Drop-down options include all counties in Florida.
▲ Home School Zone	<i>HomeZonedSchool</i>	The district-designated attendance zone for the child.
● Residence County	<i>CountyofResidence</i>	The county where the child lives. Can be changed by Data Facilitator using the Record Transfer program.
● Service County	<i>ServiceCounty</i>	The county in which the child is receiving services. Can be changed by Data Facilitator using the Record Transfer program.
▲ Current Location	<i>Location</i>	The location at which the child is receiving services. It may be the home; the name of an agency, school, or child care provider; or any other location where the child is receiving services.
▲ Primary Language	<i>PrimaryLanguage</i>	The primary language the child uses to communicate. This may or may not be the primary language used in the home.
▲ Other Language	<i>OtherLanguage</i>	A language other than the child's primary language that is spoken in the home by the parent or by another caregiver or that the child speaks or understands.
▲ Current Sub Location	<i>SubLocation</i>	Current Sub Location is locally definable. There should be agreement among the users on how this field is to be used. Some options are: home school zone, school number, area or region of service, school or service location name, or other locally definable location.
◆ Student Number	<i>StudentNumber</i>	The district-designated student ID for the child (10-digit number).
● Migrant	<i>Migrant</i>	Indicates whether the child is from a migrant family (migratory agriculture or fishing laborers). Drop-down options include the following: • <u>Y</u>: Yes • <u>N</u>: No

◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
+ Ethnicity (Hispanic)	<i>Ethnicity</i>	The child's ethnicity. Indicates whether the child is <u>Hispanic or Latino</u> (a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.)
■ Race	<i>Race</i>	The child's race. Categories are based on the Division of Public Schools state student database definitions. Multiple race categories may be selected, at least one is required. Check box options include the following: • <u>American Indian or Alaskan Native</u>: a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment. • <u>Asian</u>: a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. • <u>Black or African American</u>: a person having origins in any of the black racial groups of Africa. • <u>Native Hawaiian or Other Pacific Islander</u>: a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. • <u>Parent Refused Designation</u>: parent or guardian declined to provide race information • <u>Unknown</u>: no racial information known • <u>White</u>: a person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Significant Adult Information

+ Add Entry
Save

Adult 1
Adult 2
Adult 3

Significant Adult 2
↑ ↓ Delete

Last Name
First Name
Relation

Hjk
Fnk
Father

Lives With
Legal Guardian
Courtesy Title

☒ Y
☒ Y
Mr.

Email
Email Notes

chris.um@miami.edu

Language One
Language Two

English
Creole

Physical Address

Address

5665 Ponce de Leon Blvd

City
State
Zip

Cory Town
FL
33146

Mail?

☒ Y
☐ N

Phone 1
Phone 2
Phone 3

305-284-5514

Notes 1
Notes 2
Notes 3

Mailing Address

Address

5665 Ponce de Leon Blvd

City
State
Zip

Cory Town
FL
33146

Directions To Home

Third house on left

Previous Addresses

- Free text field
- Automatically calculated field
- State-defined drop-down list
- Locally defined drop-down list
- Display only field
- Button option
- Check box field
- Radio button

Screen Field Name	Actual Field Name	Field Description
♣ Add Entry	N/A	Adds new Significant Adult record.
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.
♦ Last Name	<i>AdultLastName</i>	The last name of the significant adult. There are no limit restrictions on the number of significant adults that can be added to a child's record.
♦ First Name	<i>AdultFirstName</i>	The first name of the significant adult.
● Relation	<i>AdultRelation</i>	The legal relationship of the significant adult to the child. Drop-down options include the following: • <u>Mother</u> • <u>Father</u> • <u>Parents</u> • <u>Grandparent</u> • <u>Foster Parent</u> • <u>Surrogate Parent</u> • <u>Step Parent</u> • <u>Guardian Ad Litem</u> • <u>Other Relative</u> • <u>Other</u>
+ Lives With	<i>AdultLivesWith</i>	The person or persons with whom the child lives. If a child lives in more than one home or if more than one significant adult lives with the child, this field may be used for more than one significant adult, as in the case of joint or shared custody. Drop-down options include the following: • <u>Y</u>: Yes • <u>N</u>: No
+ Legal Guardian	<i>AdultLegalGuardian</i>	Indicates whether the person in the Relation field is designated as the child's legal guardian. Drop-down options include the following: • <u>Y</u>: Yes • <u>N</u>: No

Screen Field Name	Actual Field Name	Field Description
● Courtesy Title	<i>AdultCourtesyTitle</i>	Courtesy titles are forms of address to be used in correspondence. Drop-down options include the following: • <u>Mr.</u> • <u>Ms.</u> • <u>Mrs.</u> • <u>Mr. & Mrs.</u> • <u>Dr.</u> • <u>Fr.</u> • <u>Rev.</u>
◆ Email	<i>AdultEmail</i>	The email address for the significant adult.
◆ Email Notes	<i>AdultEmailNotes</i>	Notes that are pertinent to the Email.
▲ Language One	<i>AdultLanguage</i>	The primary language the parent uses to communicate. This may or may not be the primary language used in the home.
▲ Language Two	<i>AdultLanguagetwo</i>	The secondary language the parent uses to communicate.
◆ Phys Address	<i>AdultPermStreet,</i> <i>AdultPermCity,</i> ▲ <i>AdultPermState,</i> <i>AdultPermZip</i>	The physical street address of the significant adult. Includes house number, street name, apartment number, box number, or other information required for mailing. The City name is selected from a drop-down list. Address, State, and Zip Code are free text fields.
+ Mail?	<i>AdultMail</i>	Designator for whether the referenced person should be included in mailings regarding the child. Mailings can be selected to go to multiple addresses. Selecting “Yes” will copy the physical address into the mailing address if the mailing address is blank. Drop-down options include the following: • <u>Y</u>: Yes • <u>N</u>: No
◆ Phones	<i>AdultPhone1,</i> <i>AdultPhone2,</i> <i>AdultPhone3</i>	The telephone number, including area code, for the significant adult.
◆ Notes	<i>AdultNotes1,</i> <i>AdultNotes2,</i> <i>AdultNotes3</i>	Notes that are pertinent to the telephone number, such as hours of use, location, or other instructions.

◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
♦ Mail Address	<i>AdultStreet,</i> <i>AdultCity, ▲</i> <i>AdultState,</i> <i>AdultZip</i>	The mailing address of the significant adult. Includes house number, street name, apartment number, box number, or other information required for mailing. The City name is selected from a drop-down list. Address, State, and Zip Code are free text fields.
♦ Directions to Home	<i>AdultDirectionsTo-Home</i>	Directions on how to get to the home where the child is living. This field can include information that is necessary to find the referenced address. Street names, landmarks, and directional cues may be included.
♦ Previous Addresses	<i>PreviousAddresses</i>	Previous addresses of the significant adult. This includes any address information regarding where the child lived prior to the current mailing or physical address.

Other Adults

 Saved

Additional Significant Adult Information

Screen Field Name	Actual Field Name	Field Description
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.
♦ Additional Significant Adult Information	<i>OtherAdultInfo</i>	Information pertaining to other significant adults with whom Service Coordinators make arrangements concerning this child that are not entered in the significant adult records.

♦ Free text field
▲ Automatically calculated field
● State-defined drop-down list
▲ Locally defined drop-down list
♥ Display only field
♣ Button option
■ Check box field
⊕ Radio button

Critical Info

Saved

Medicaid Number

Social Security Number

Critical Notes

Don't Call after 5pm

Screen Field Name	Actual Field Name	Field Description
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.
♦ Medicaid Number	<i>MedicaidNumber</i>	The child's Medicaid number.
♦ Social Security Number	<i>SSN</i>	The child's Social Security Number. Note: This field has restricted access. The field automatically changes to red if the number is entered in the wrong format.
♦ Critical Notes	<i>CriticalNotes</i>	Any information of a critical nature that needs to be considered when working with the child or family but that should not be part of the open record. This might include sensitive information, such as whether the child is in protective custody. The field label automatically changes to red if there is information entered in this field.

Tracking Summary

The **Tracking Summary** screen contains confidential information regarding service provision. The **Tracking Summary** screen also displays child information, which can be modified from the **Demographic** screen.

The General tab displays current child's demographic information.

The SC Events tab displays the Service Coordination Summary Screen.

The Timeline Events tab displays the Timeline Summary Screen.

Header and Child Information

The header and child information fields are automatically calculated by the program or pulled through from the Demographics screen. Users cannot modify these fields on the Tracking screen.

Search > [Asi, Odi](#) DBNUM: 522978 Child ID: 522978.68 Age: 5.11 Record Creator: DOB: 09/05/2016 chrispasco

Demographics Tracking Forms Print Transfer

General

SC Events

Timeline Events

Header & Child Info →

Saved

DBNUM: **522978** Child ID: **522978.68** DOB: **09/05/2016** Age: **5.11**

Last Name: **Asi** Suffix: First Name: **Odi** Middle Name:

SY5: **2022** This child is currently: **5 years 11 months and 11 days**

Record Creator	Update Date	3rd Birth Day
ryanc	05/18/2022	09/05/2019
Primary Language	County of Residence	Location
English	Pasco	LMES
Sub Location	Staff Assigned	ISC or Service Coordinator
St Thomas Aquinas Early Learning-NP	Agency	Doctor
Code		
DP-4 Screening		
PreK Funding Programs		
Program 1	Program 2	Program 3
Migrant PreK	-- Select --	-- Select --
Agencies/Providers		
Agency / Provider 1	Agency / Provider 2	Agency / Provider 3
Parent	-- Select --	-- Select --
Exceptionality Status	Timeline Status	Service Coordination Status
N	EF	FTE
Inter Agency Release	Start Date	End Date
No	MM/DD/YYYY	MM/DD/YYYY

- ◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
♣ Demographics	N/A	Displays child's General Demographics Information.
♣ Tracking	N/A	Displays child's General Tracking Summary Information.
♣ Forms	N/A	Displays current user's custom forms and letters.
♣ Print	N/A	Downloads a PDF document of the current child's demographic summary, tracking summary and/or a detailed report of all demographic and tracking information.
♣ Transfer	N/A	Allows Data Facilitators to move a child's record to one of the 67 Florida Counties. (For more information, see Data Facilitator Manual)
♣ General	N/A	Displays current child's demographic information.
♣ SC Events	N/A	Displays Service Coordination Summary Screen.
♣ Timeline Events	N/A	Displays Timeline Summary Screen.
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.
♠ DBNUM	<i>Dbnum</i>	The number that is automatically assigned to the child's record at the time the record is entered into the system. This value is unique within each site.
♥ Child ID	<i>ChildID</i>	The child's unique statewide identification number. The first part of the number is the <i>Dbnum</i> and the second part of the number is the site's unique identification number (Site ID).
♥ DOB	<i>DOB</i>	The child's date of birth as verified by a birth record.
♠ Age	<i>Age</i>	The child's age today (based on the system date on the computer).

Screen Field Name	Actual Field Name	Field Description
♥ Last Name	<i>LastName</i>	The child's last name.
♥ Suffix	<i>Suffix</i>	Any suffix added to the child's legal name.
♥ First Name	<i>FirstName</i>	The child's first name.
♥ Middle Name	<i>MiddleName</i>	The child's middle name.
♠ SY5	<i>SY5</i>	The school year in which the child will turn five years old.
♠ This child is currently	<i>CurrentAge</i>	Child's age spelled out in years, months and days.
♠ Record Creator	<i>RecordCreator</i>	The person who established the record in CHRIS.
♠ Update Date	<i>UpdateDate</i>	The date the record was most recently updated.
♠ 3rd BDay	<i>ThirdBDay</i>	The date the child will turn three years old.
♥ Primary Language	<i>PrimaryLanguage</i>	The primary language the child uses to communicate. This may or may not be the primary language used in the home.
♥ County of Residence	<i>CountyOfResidence</i>	The county where the child lives.
♥ Location	<i>Location</i>	The location at which the child is receiving services. It may be the home or the name of an agency, school, child care provider, or any other location placement where the child is receiving services.
♥ Sub Location	<i>SubLocation</i>	Current Sub Location is locally definable. Some options are: home school zone, school number, area or region of service, school or service location name, or other locally definable location.

The General section includes Tracking Summary fields.

The General section includes Tracking Summary fields.

General

SC Events

Timeline Events

DBNUM: **522978** Child ID: **522978.68** Age: **5.11** Record Creator: **DOB: 09/05/2016** chrispasco

Demographics Tracking Forms Print Transfer

Saved

DBNUM: **522978** Child ID: **522978.68** DOB: **09/05/2016** Age: **5.11**

Last Name: **Asi** Suffix: First Name: **Odi** Middle Name:

SY5: **2022** This child is currently: **5 years 11 months and 11 days**

Record Creator ryanc	Update Date 05/18/2022	3rd Birth Day 09/05/2019
Primary Language English	County of Residence Pasco	Location LMES
Sub Location St Thomas Aquinas Early Learning-NP	Staff Assigned Agency	ISC or Service Coordinator Doctor
Code DP-4 Screening		
PreK Funding Programs		
Program 1 Migrant PreK	Program 2 -- Select --	Program 3 -- Select --
Agencies/Providers		
Agency / Provider 1 Parent	Agency / Provider 2 -- Select --	Agency / Provider 3 -- Select --
Exceptionality Status N	Timeline Status EF	Service Coordination Status FTE
Inter Agency Release No	Start Date MM/DD/YYYY	End Date MM/DD/YYYY

Tracking Summary Fields

- ◆ Free text field
▲ Automatically calculated field
● State-defined drop-down list
▲ Locally defined drop-down list
◆ Display only field
♣ Button option
■ Check box field
⊕ Radio button

Screen Field Name	Actual Field Name	Field Description
♣ General	N/A	Displays current child's demographic information.
♣ SC Events	N/A	Displays Service Coordination Summary Screen.
♣ Timeline Events	N/A	Displays Timeline Summary Screen.
▲ Staff Assigned	<i>StaffAssignedFull-Name</i>	The name of the staff person assigned to coordinate services for the child.
▲ ISC or Service Coordinator	<i>ISCorSCFullName</i>	The child's Interim Service Coordinator (ISC) or Service Coordinator (SC). The person who has primary responsibility for interagency coordination of services and case management for this child. It may be a person from the school system, or an agency.
▲ Code	<i>Code</i>	The use of this field is locally defined.

Screen Field Name	Actual Field Name	Field Description
● PreK Funding Program (1, 2, 3)	<i>AgenciesKnown1, AgenciesKnown2, AgenciesKnown3</i>	Prekindergarten (PreK) programs or services (up to three) that the child has attended. Drop-down options include the following: • <u>Early Head Start</u> • <u>Early Learning Coalition Program</u> (including subsidized child care) • <u>Even Start</u> • <u>Head Start</u> • <u>Migrant PreK</u> • <u>None</u> • <u>Part B – Kindergarten</u> • <u>Part B – PreK</u> • <u>Part C – Early Steps</u> • <u>Private Preschool</u> • <u>Private Program</u> • <u>Teenage Parent Program</u> • <u>Title 1 – PreK</u> • <u>VPK</u>
▲ Agencies/ Providers (1, 2, 3)	<i>ProvidersKnown1, ProvidersKnown2, ProvidersKnown3</i>	The agencies (up to three) to whom the child is known. This includes any agencies or providers that have provided or are providing services to the child or agencies that are providing services to the family that impact the child.
♣ Exceptionality Status	<i>ExceptionalityStatus</i>	Indicates the child's status regarding eligibility for an Individuals with Disabilities Education Act (IDEA) Part B exceptionality program. This field indicates eligibility for Part B regardless of receipt of exceptional student education (ESE) services. Drop-down options include the following: • <u>E</u>: Eligible for IDEA Part B exceptionality program. (Primary Exceptionality has been selected within the ESE Eligibility event.) • <u>I</u>: Ineligible. Child has been determined ineligible for Part B services. • <u>N</u>: Not Determined. An Evaluation event exists, but no ESE Eligibility event has been created. Status remains "N" until an ESE Eligibility event is created.

♦ Free text field ♣ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
 Timeline Status	<i>TimelineStatus</i>	The most recent Timeline event in the child's record. Status options include the following: • <u>TM</u>: Part C to Part B Meeting. A <i>Part C to Part B Date</i> has been entered. • <u>SR</u>: Screening Requested. A <i>Referral for Screening Date</i> has been entered. No detailed event information has been entered. • <u>SC</u>: Screening. Detailed event information has been entered, but no <i>Final Result Date</i>. • <u>SF</u>: Screening Final Result. <i>Screening Final Result Date</i> has been entered. • <u>ER</u>: Evaluation Requested. <i>Referral Date</i> has been entered, no detailed event information. • <u>EV</u>: Evaluation. Detailed event information has been entered, but no <i>Final Result Date</i>. • <u>EF</u>: Evaluation Final Result. <i>Evaluation Completion Date</i> has been entered. • <u>ES</u>: ESE Staffing. <i>ESE Staffing Date</i> has been entered. • <u>SP</u>: Individual Educational Plan (IEP)/ Individualized Family Support Plan (IFSP). <i>IEP/IFSP Date</i> has been entered. • <u>ET</u>: End Timeline. <i>End Timeline Date</i> has been entered.

Screen Field Name	Actual Field Name	Field Description
 Service Coordination Status	<i>ServiceCoordinationStatus</i>	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. • <u>AP</u>: Appointments • <u>PS</u>: Packet Sent • <u>PR</u>: Packet Returned • <u>PFU</u>: Periodic Follow Up • <u>OH</u>: On Hold • <u>FTE</u>: Folder to District/LEA • <u>RFC</u>: Referral First Contact • <u>RI</u>: Referral In • <u>RO</u>: Referral Out • <u>RIN</u>: Referral Inactive • <u>RC</u>: Referral Closed
 Interagency Release	<i>InterAgencyRelease</i>	Existence of an Interagency Release. • <u>No</u>: No Interagency Release in the child's record. • <u>Yes</u>: An Interagency Release is present in the child's record Record should be consulted for restrictions prior to releasing any information. All releases are restricted to certain situations and agencies.
 Start Date	<i>InterAgencyStartDate</i>	The beginning effective date of the most current interagency release in the child's file.
 End Date	<i>InterAgencyEndDate</i>	The termination date of the most recent interagency release in the child's file.

Service Coordination Events

Twelve events are available for Child Find Specialists to track Service Coordination information in CHRIS. They represent significant points in case management.

+ Add Event

Service Coordination Events

Contact Log Events:  Hide

Event	Date ↑↓	AN ↑↓	Summary
Appointments	01/15/2026	Yes	Scheduled,10:00 AM,Screening,...Y
Referral Closed	11/17/2025	Yes	Entered Part B Services
Referral Inactive	11/17/2025	-	Child did not enroll
Folder to District/LEA	11/17/2025	-	11/18/2025,
On Hold	10/11/2025	-	Completed
Periodic Follow-Up	09/25/2025	-	,Speak to parents
Referral In	09/01/2025	Yes	ABCTest, Two,Hearing
Referral Out	08/28/2025	Yes	Clearwater Free Clinic,Needed further eval
Packet Returned	08/20/2025	-	-
Packet Sent	08/18/2025	-	-
Contact Log	08/18/2025	-	Call to Parent
Referral First Contact	08/15/2025	-	Test, Two,Hearing

20 ▾

1

- ◆ Free text field

⚡ Automatically calculated field

● State-defined drop-down list

▲ Locally defined drop-down list

♥ Display only field

♣ Button option

■ Check box field

⊕ Radio button

Screen Field Name	Actual Field Name	Field Description
♣ Add Event		Adds a new Service Coordination event for the child's record.
♣ Hide/Show Contact Log Events	<i>Display</i>	Clicking the "Show" button displays all Contact Log events. Clicking the "Hide" button removes all Contact Log events. The purpose is to allow users to maximize space on the Tracking Summary screen by not displaying the Contact Log events.
🔹 Event	<i>EventName</i>	Service Coordination Events that have taken place. Clicking on the event opens the associated event detail screen.
🔹 Date	<i>EventDate</i>	The date the associated event occurred. This date is entered at the time the event was created. It can be edited on the event detail screen. Editing the event date on the event detail screen also changes the date of the event on the Tracking Summary screen.
🔹 AN	<i>TrnActionNeeded-Flag</i>	Displays "Yes", which indicates that an Action Needed has been created for that event.
🔹 Summary	<i>Summary</i>	The information in this field is compiled automatically from the data entered in the event detail screen (see Table 2).

Summary Data for Service Coordination Events

Event Name	Fields Displayed
Referral First Contact	Referred By, Referral Reason
Referral In	Referred By, Referral Reason
Appointments	Status, Time, Type (1, 2, 3), Location, Confirmed
Contact Log	Contact Reason
Packet Sent	Packet Sent Comments
Packet Returned	Packet Returned Comments
Referral Out	Referred To, Referral Out Reason
Periodic Follow Up	Action Needed Follow Up Date, Comments
On Hold	Reason, Notes
Folder to District/LEA	Date Folder Sent to District or LEA, Notes
Referral Inactive	Referral Inactive Reason
Referral Closed	Referral Closed Reason

♦ Free text field 🔹 Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Header

The following fields are defined once here. These fields are displayed at the top of the screen for every Timeline and Service Coordination event (Part C to Part B, Screening, Evaluation, ESE Eligibility, Part B Service Plan IEP/IFSP, End Timeline, Referral First Contact, Referral In, Appointments, Contact Log, Packet Sent, Packet Returned, Referral Out, Periodic Follow-Up, On Hold, Folder to District/LEA, Referral Inactive and Referral Closed).

Header →

← [Back to SC Events](#)

[Delete Event](#) [Prev](#) 7 of 12 [Next](#) [Saved](#)

The event name will change depending on which event is currently being viewed

Referral In

Name: **Oui, Sebastian James** DBNUM: **669358** Child ID: **669358.29**

Code: **Jessica Rey** DOB: **12/15/2022** Age: **3.00**

SY5: **2028** Update Date: **11/17/2025** Record Creator: **CHRIS**

3rd BDay: **12/15/2025** Language: **English** Event Modifier: **chrispinellas**

County of Residence: **Pinellas** Staff Assigned: **ABCTest, One**

Screen Field Name	Actual Field Name	Field Description
♣ Back to Timeline/ SC Events	N/A	Displays the Timeline or Service Coordination Events screen.
♣ Prev, Next	N/A	Allows the user to scroll forward and backward through the six Timeline Events.
♣ Saved/Save	N/A	Save=Data entered is unsaved. Saved=Data entered has been saved. CHRIS saves automatically every 15 seconds.
♣ Delete Event	N/A	Allows users with Delete privileges to delete entire event from CHRIS.

♦ Free text field 🔵 Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
♥ Name	<i>LastName, FirstName, MiddleName</i>	The child's last name, first name and middle name.
♠ DBNUM	<i>Dbnum</i>	The number that is automatically assigned to the child's record at the time the record is entered into the system. This value is unique within each site.
♥ Child ID	<i>ChildID</i>	The child's unique statewide identification number. The first part of the number is the <i>Dbnum</i> and the second part of the number is the site's unique identification number (Site ID).
♥ Code	<i>Code</i>	Displays contents from Code field on the Tracking screen.
♥ DOB	<i>DOB</i>	The child's date of birth as verified by a birth record.
♠ Age	<i>Age</i>	The child's age today (based on the system date on the computer).
♠ SY5	<i>SY5</i>	The school year in which the child will turn five years old.
♠ 3rd BDay	<i>ThirdBDay</i>	The date the child will turn three years old.
♥ Language	<i>PrimaryLanguage</i>	The primary language the child uses to communicate. This may or may not be the primary language used in the home.
♥ County of Residence	<i>CountyOfResidence</i>	The county where the child lives.
♥ Staff Assigned	<i>StaffAssignedFull-Name</i>	The name of the staff person assigned to coordinate services for the child.
♠ Update Date	<i>UpdateDate</i>	The date the record was most recently updated.
♠ Record Creator	<i>RecordCreator</i>	The person who established the record in CHRIS.
♠ Event Modifier	<i>EventModifier</i>	The person who last modified the current screen.

Footer

The following fields are defined once here. These fields are displayed at the bottom of the screen for every Timeline and Service Coordination event (Part C to Part B, Screening, Evaluation, ESE Eligibility, Part B Service Plan IEP/IFSP, End Timeline, Referral First Contact, Referral In, Appointments, Contact Log, Packet Sent, Packet Returned, Referral Out, Periodic Follow-Up, On Hold, Folder to District/LEA, Referral Inactive and Referral Closed).

Action Needed	
Follow Up Date	Completed Date
MM/DD/YYYY	MM/DD/YYYY
Notes	

Screen Field Name	Actual Field Name	Field Description
♦ Action Needed	<i>ActionNeeded</i>	The immediate next action that should be taken regarding this child. Description of the next step to be taken in the Service Coordination continuum.
♦ Follow Up Date	<i>ActionNeededFU-Date</i>	The projected date that follow-up is needed. This should be the date that the Action Needed will be completed.
♦ Completed Date	<i>ActionNeededComp-Date</i>	The date the Action Needed was completed.
♦ Notes	<i>(CurrentEvent)Notes</i>	Any notes specific to the referenced event.

Referral First Contact

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Referral First Contact Date:
08/21/2024

Referred By
Test, Two

Phone
(813) 828-2273

Fax
(813) 828-1742

Email

Referral Source
6th Medical Group--MacDill AFB

Phone
(813) 828-2273

Fax
(813) 828-1742

Email

Referral Reason
Hearing

Awareness Source
-- Select --

Screen Field Name	Actual Field Name	Field Description
◆ Referral First Contact Date	<i>ReferralFirstContact-Date</i>	The very first date that this child became known or was referred.
▲ Referred By	<i>ReferralFirstContact-RefBy</i>	The person who made the initial referral. This could be the parent, a neighbor, or a professional but should reflect the person who actually made the contact.
⚡ Phone	<i>ReferralFirstContact-RefByPhone</i>	Telephone number, including area code, for the person who made the initial contact.
⚡ Fax	<i>ReferralFirstContact-RefByFax</i>	Fax number, including area code, for the person who made the initial contact.

Screen Field Name	Actual Field Name	Field Description
♠ Email	<i>ReferralFirstContact-RefByEmail</i>	Email address for the person who made the initial contact.
▲ Referral Source	<i>ReferralFirstContact-Source</i>	The source of the information that generated the contact. This may be an agency, a professional, a friend or neighbor, or a type of media intended to provide information about referral, such as a radio spot, a poster, or other awareness information.
♠ Phone	<i>ReferralFirstContact-SourcePhone</i>	Telephone number, including area code, for the referral source.
♠ Fax	<i>ReferralFirstContact-SourceFax</i>	Fax number, including the area code, for the referral source.
♠ Email	<i>ReferralFirstContact-SourceEmail</i>	Email address for the referral source.
◆ Referral Reason	<i>ReferralFirstContact-Reason</i>	Reason the child was initially referred. This should include information regarding the specific concerns of the referring party regarding the child and should provide enough information for the case coordinator to determine an appropriate “next step.”

Screen Field Name	Actual Field Name	Field Description
● Awareness Source	<i>ReferralFirstContact-Awareness</i>	Source through which the initial contact was made. Drop-down options include the following: • <u>Agency Employee</u> • <u>Billboard</u> • <u>Booth or Kiosk</u> • <u>Business Insert</u> • <u>Child Find Presentation</u> • <u>Flyer/Brochure</u> • <u>Friend</u> • <u>Health Fair</u> • <u>Health Provider</u> • <u>Mass Screening</u> • <u>Movie PSA</u> • <u>Newsletter</u> • <u>Newspaper</u> • <u>Parent Magazine</u> • <u>Poster</u> • <u>Preschool/Child Care</u> • <u>Radio</u> • <u>Relative</u> • <u>School Employee</u> • <u>Social Media</u> • <u>TV</u> • <u>Website</u> • <u>Yellow Pages</u>

Referral In

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled "Referral In" with the following fields:

- Referral In Date:** A text field containing "09/27/2019".
- Referred By:** A dropdown menu showing "South PKAT".
- Phone:** A text field.
- Fax:** A text field.
- Email:** A text field.
- Referral Source:** A dropdown menu showing "ABA Academy".
- Phone:** A text field containing "(727) 388-9449".
- Fax:** A text field.
- Email:** A text field.
- Referral Reason:** A large text area.
- Awareness Source:** A dropdown menu showing "-- Select --".
- Record Transferred From:** A text field.

Screen Field Name	Actual Field Name	Field Description
◆ Referral In Date	<i>ReferralInDate</i>	The date of any referral received when a Referral First Contact event already exists. Referral In should only be used when there is no open timeline and significant time has elapsed since there has been activity on a previous referral.
▲ Referred By	<i>ReferralInRefBy</i>	The person who made the referral. This could be the parent, a neighbor, or a professional but should reflect the person who actually made the contact.

Screen Field Name	Actual Field Name	Field Description
♣ Phone	<i>ReferralInRefBy-Phone</i>	Telephone number, including area code, for the person who made the referral.
♣ Fax	<i>ReferralInRefBy-Fax</i>	Fax number, including area code, for the person who made the referral.
♣ Email	<i>ReferralInRefBy-Email</i>	Email address for the person who made the referral.
▲ Referral Source	<i>ReferralInSource</i>	The source of the information that generated the referral. This may be an agency, a professional, a friend or neighbor, or a type of media intended to provide information about referral, such as a radio spot, a poster, or other awareness information.
♣ Phone	<i>ReferralInSource-Phone</i>	Telephone number, including area code, for the referral source.
♣ Fax	<i>ReferralInSource-Fax</i>	Fax number, including area code, for the referral source.
♣ Email	<i>ReferralInSource-Email</i>	Email address for the referral source.
◆ Referral Reason	<i>ReferralInReason</i>	Reason the child was referred. This should include information regarding the specific concerns of the referring party regarding the child and should provide enough information for the case coordinator to determine an appropriate “next step.”

Screen Field Name	Actual Field Name	Field Description
● Awareness Source	<i>ReferralInAwareness</i>	Source through which the initial contact was made. Drop-down options include the following: • <u>Agency Employee</u> • <u>Billboard</u> • <u>Booth or Kiosk</u> • <u>Business Insert</u> • <u>Child Find Presentation</u> • <u>Flyer/Brochure</u> • <u>Friend</u> • <u>Health Fair</u> • <u>Health Provider</u> • <u>Mass Screening</u> • <u>Movie PSA</u> • <u>Newsletter</u> • <u>Newspaper</u> • <u>Parent Magazine</u> • <u>Poster</u> • <u>Preschool/Child Care</u> • <u>Radio</u> • <u>Relative</u> • <u>School Employee</u> • <u>Social Media</u> • <u>TV</u> • <u>Website</u> • <u>Yellow Pages</u>
▲ Record Transferred From	<i>PreTransferResidenceCounty</i>	County of Residence prior to record transfer.

Appointments

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Appointment Date: 03/02/2026		
Time 10:00 AM	End Time 12:30 PM	
Confirmed Y	Status Scheduled	Location At your child's preschool/Daycare
Address	Directions	Transport
Provider/Staff ABCTest, One	Appointment Type Screening	
Provider/Staff 2 -- Select --	Appointment Type 2 -- Select --	
Provider/Staff 3 -- Select --	Appointment Type 3 -- Select --	
Provider/Staff 4 -- Select --	Appointment Type 4 -- Select --	
Provider/Staff 5 -- Select --	Appointment Type 5 -- Select --	

Screen Field Name	Actual Field Name	Field Description
♦ Appointment Date	<i>ApptDate</i>	The date the appointment was scheduled to occur. This date is entered at the time the event is created. It can be edited on the detail screen.
♦ Time	<i>ApptTimeCalc</i>	Beginning time of the appointment. This field is set to record a.m. or p.m. based on the normal workday.

♦ Free text field ⚡ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
● Confirmed	<i>ApptConfirmed</i>	Indicates whether the appointment was confirmed with the parent and the provider. Drop-down options include the following: • <u>Y</u>: Yes • <u>N</u>: No
● Status	<i>ApptStatus</i>	Indicates the status of the appointment. Drop-down options include the following: • <u>C</u>ancelled • <u>C</u>ompleted • <u>M</u>ust Return • <u>N</u>o Show • <u>R</u>escheduled • <u>S</u>cheduled • <u>V</u>irtual
▲ Location	<i>ApptLocation</i>	Location of the appointment.
◆ Address	<i>ApptAddress</i>	Address of the location of the appointment.
◆ Directions	<i>ApptDirections</i>	Directions to the location of the appointment. Landmarks, street names, and other points of reference may be entered.
◆ Transport	<i>ApptTransport</i>	Indicates family needs regarding transportation or any special transportation arrangements that have been made.
▲ Provider/Staff	<i>ApptProvider1,</i> <i>ApptProvider2,</i> <i>ApptProvider3,</i> <i>ApptProvider4,</i> <i>ApptProvider5</i>	The name of the person or agency with whom the appointment has been arranged for the referenced time, date, and location. Up to five providers can be identified for each appointment.
▲ Appointment Types	<i>ApptType1,</i> <i>ApptType2,</i> <i>ApptType3,</i> <i>ApptType4,</i> <i>ApptType5</i>	General description of the scheduled appointment.
◆ End Time	<i>ApptEndTimeCalc</i>	Ending time of the appointment. This field is set to record a.m. or p.m. based on the normal workday.

◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ▼ Display only field ♣ Button option ■ Check box field + Radio button

Contact Log

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled "Contact Log" with the following fields and controls:

- Contact Date:** A text field containing "10/04/2019".
- Contact Method:** A drop-down menu showing "Email".
- Staff:** A drop-down menu showing "Cory Beermann".
- Contact:** Radio buttons for "From" (selected) and "To".
- Made To:** A text field containing "Mother".
- Contact Reason:** A drop-down menu showing "Call to Evaluator".
- Contact Notes:** A large text area for notes.

Screen Field Name	Actual Field Name	Field Description
◆ Contact Date	<i>ConLogDateOf-Contact</i>	The date the contact occurred.
● Contact Method	<i>ConLogMethodOf-Contact</i>	Indicates how the contact was made. Drop-down options include the following: • <u>Email</u> • <u>Fax</u> • <u>Letter</u> • <u>Online</u> • <u>Personal Contact</u> • <u>Phone</u> • <u>Text</u>
▲ Staff	<i>ConLogContact-MadeTo</i>	The staff member who made or received the contact.
+ Contact From/To	<i>ConLogFromTo</i>	Indicates whether the contact was to or from the entry in the adjacent field.
◆ Made To	<i>ConLogContact-MadeBy</i>	Indicates who the contact was from or who the contact was made to as indicated by the From/To buttons adjacent to this field.
▲ Contact Reason	<i>ConLogReasonFor-Contact</i>	The purpose of the contact.
◆ Contact Notes	<i>ConLogContact-Notes</i>	Additional information regarding this contact.

Packet Sent

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled "Packet Sent Date:" with a date input field containing "03/30/2021". Below this is a section titled "Comments" with a large text area containing the text "Summary information.".

Screen Field Name	Actual Field Name	Field Description
♦ Packet Sent Date	<i>PacketSentDate</i>	The date the packet was sent to the parent in response to a referral or request.
♦ Comments	<i>PacketSentComments</i>	Additional information regarding the request for information or the packet sent.

Packet Returned

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled "Packet Returned". It contains two main sections: "Packet Returned Date:" with a text input field containing "04/02/2021", and "Comments" with a large text area containing the text "Packet was returned.".

Screen Field Name	Actual Field Name	Field Description
♦ Packet Returned Date	<i>PacketReturnedDate</i>	The date of parent response to a request for information.
♦ Comments	<i>PacketReturnedComments</i>	Additional information regarding the request for information or the packet returned.

Referral Out

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled "Referral Out" with the following fields:

- Referral Out Date:** A text input field containing "04/17/2021".
- Referred To:** A dropdown menu with "Bay Area Montessori" selected.
- Reason:** A text input field.
- Who is Responsible:** A dropdown menu with "Audiological, Services" selected.

Screen Field Name	Actual Field Name	Field Description
◆ Referral Out Date	<i>ReferralOutDate</i>	The date the child or family was referred to another person or agency for services.
▲ Referred To	<i>ReferralOutRefTo</i>	Name of the person or agency to which the child or family was referred for additional services.
◆ Reason	<i>ReferralOutReason</i>	General description of the reason for the referral, including areas of concern to be addressed.
▲ Who is Responsible	<i>ReferralOutResponsibleFullName</i>	Person (or agency) responsible for following up on this referral to determine whether appropriate action was taken.

Periodic Follow-Up

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Periodic Follow Up Date:

06/30/2021

Comments

Remember to check for follow Up.

Screen Field Name	Actual Field Name	Field Description
♦ Periodic Follow Up Date	<i>PeriodicFollowUpDate</i>	The date the follow-up was scheduled to occur.
♦ Comments	<i>PeriodicFollowUpComments</i>	Additional information regarding the reason follow-up was needed.

On Hold

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

The screenshot shows a form titled 'On Hold'. At the top left, there is a text field labeled 'On Hold Date:' containing the value '04/15/2021'. To its right is a text field labeled 'Completed Date:' with a placeholder 'MM/DD/YYYY'. Below the 'On Hold Date' field is a dropdown menu labeled 'Reason' with the selected option 'Waiting parent consent'. At the bottom is a large, empty text area labeled 'Notes'.

Screen Field Name	Actual Field Name	Field Description
♦ On Hold Date	<i>OnHoldDate</i>	The date the child's record was placed on hold.
♦ Completed Date	<i>OnHoldCompleted-Date</i>	Date On Hold event was completed.
▲ Reason	<i>OnHoldReason</i>	Reason the child's record was placed on hold. On Hold is a temporary status and as such an Action Needed and a Follow-Up Date should always be provided.
♦ Notes	<i>OnHoldComments</i>	Additional information regarding the reason(s) for placing the child's record on hold.

Folder to District/LEA

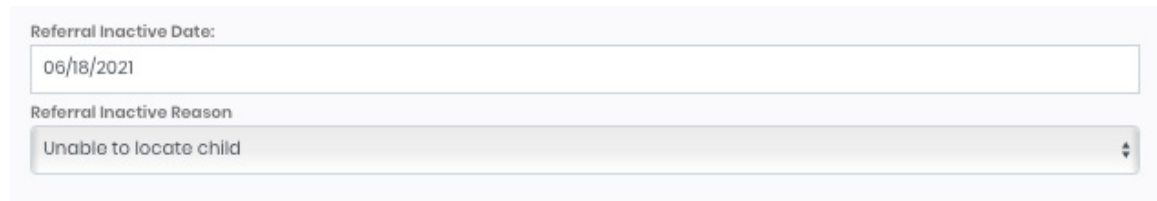
The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Folder To District/LEA Date:	Received By District/LEA Date:
09/04/2024	09/04/2024
Folder To District/LEA Notes	

Screen Field Name	Actual Field Name	Field Description
♦ Folder to District/LEA Date	<i>FolderToESEDate</i>	The date Child Find records were sent to the District or LEA.
♦ Received By District/LEA Date	<i>ReceivedByESEDate</i>	The date Child Find records were received by District or LEA.
♦ Folder to District/LEA Notes	<i>FolderToESEComments</i>	Additional information regarding records sent to District or LEA.

Referral Inactive

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).



The screenshot shows a form with two fields. The first field is labeled "Referral Inactive Date:" and contains the date "06/18/2021". The second field is labeled "Referral Inactive Reason" and is a dropdown menu with the selected option "Unable to locate child".

Screen Field Name	Actual Field Name	Field Description
♦ Referral Inactive Date	<i>ReferralInactiveDate</i>	The date active case management was suspended.

Screen Field Name	Actual Field Name	Field Description
Referral Inactive Reason	<i>ReferralInactiveReason</i>	Explanation of why active case management was suspended. The child could still return. Periodic attempts to contact the family may be made by staff. Drop-down options include the following: <u>Child did not enroll</u>: Child eligible for services, significant adult did not enroll child in school. <u>Ineligible for Part B services</u>: Child was evaluated and was determined ineligible for Part B services based on a staffing event. <u>Ineligible for Part C services</u>: Child was evaluated and was determined ineligible for Part C services. <u>Moved out of service area</u>: Child moved out of service area. <u>No parent response</u>: Parent has not contacted site. <u>Parent declined services</u>: Parent did not consent to any further services. <u>Parent provided with information</u>: Referral request was for information only. <u>Passed screening</u>: Child was screened and screening results were within normal limits. <u>Receiving service with service plan</u>: Child is receiving services with an IEP or IFSP. <u>Receiving service without service plan</u>: Child is receiving services without an IEP or IFSP, such as Head Start, Child Care, Public School PreK Early Steps, Early Head Start, Private Services, or VPK not provided under IDEA, Part C/B. <u>Referred to appropriate agency</u>: Another agency is responsible for following up the referral. <u>Unable to locate child</u>: Child cannot be found to continue process.

♦ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Referral Closed

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Referral Closed Date:

06/18/2021

Referral Closed Reason

Entered Part B Services

Screen Field Name	Actual Field Name	Field Description
◆ Referral Closed Date	<i>ReferralClosedDate</i>	The date the case was closed.
● Referral Closed Reason	<i>ReferralClosedReason</i>	The explanation of why the case was closed. Situations where cases will be closed are very limited. The expectation is that this child is extremely unlikely to be referred back for services. Drop-down options include the following: • <u>Deceased</u>: Child is deceased. • <u>Entered Kindergarten</u>: Child entered a kindergarten program or reached age 6 by September 1st. • <u>Entered Part B Services</u>: Child is receiving Part B services and may have an IEP or an IFSP.

Timeline Events

The Timeline events document the number of days between Part C to Part B or Screening and the time a child has been awarded or denied services (The Timeline events are: Part C to Part B, Screening, Evaluation, ESE Eligibility, Part B Service Plan IEP/IFSP, End Timeline.)

+ Add Timeline

Timeline # 2 of 2
Time Elapsed: 0 days

Event	Date	AN	Summary	Days
Part C to Part B	3/4/2021	-	3/4/2021,	
Screening	3/4/2021	-	3/4/2021,F	0
Evaluation	3/4/2021	-	3/4/2021 Adaptive . Audiolog. BehObsrv. Commun . Developmental . Education . Bhvr. Fune	0
ESE Eligibility	3/4/2021	-		0
IEP/IFSP	3/4/2021	-		0
End Timeline	3/4/2021	-	Ineligible for Part C services	0

Summary Data for Timeline Events

Event Name	Timeline Name	Fields Displayed
Part C to Part B	Part C to Part B	Early Steps Part C to Part B Conference Date, Part C Service Coordinator
Screening	Screening	Date of Referral for Screening, Final Screening Result
Evaluation	Evaluation	Referral for Evaluation date, name of evaluation types that have a Completed Date (in alphabetical order)
ESE Eligibility	ESE Eligibility	Primary Exceptionality
Part B Services Plan IEP/IFSP	IEP/IFSP	Service Location, Service Type
End Timeline	End Timeline	End Timeline Reason

♦ Free text field
 ▲ Automatically calculated field
 ● State-defined drop-down list
 ▲ Locally defined drop-down list
♥ Display only field
 ♣ Button option
■ Check box field
+ Radio button

Screen Field Name	Actual Field Name	Field Description
♣ Add Timeline		Adds a new set of Timeline events for the child's record.
♠ Timeline #	<i>TimelineCount</i>	The number of timelines created for this child. Allows user to directly select the Timeline to display.
♠ Time Elapsed	<i>TotalDays</i>	The total number of days elapsed for the current Timeline.
♠ Summary	<i>TrnSummary,</i> <i>ScrSummary,</i> <i>EvlSummary,</i> <i>ESESummary,</i> <i>IEPIFSPSummary,</i> <i>EndSummary</i>	Summary of data entered in the event detail screen (see Summary Data for Timeline Events Table below).
♠ Days	<i>ScrDays,</i> <i>EvlDays,</i> <i>ESEDays,</i> <i>IEPIFSPDays,</i> <i>EndDays</i>	The number of calendar days between subsequent events on the Timeline.

Screen Field Name	Actual Field Name	Field Description
♣ Event		Activities that have taken place along the continuum of care that lead to the provision of appropriate services to an individual child. These event names are buttons used to enter the appropriate event screen. Button options include the following: • <u>Part C to Part B</u>: Opens the Part C to Part B screen • <u>Screening</u>: Opens the Screening screen • <u>Evaluation</u>: Opens the Evaluation screen • <u>ESE Eligibility</u>: Opens the ESE Eligibility screen • <u>IEP/IFSP</u>: Opens the Part B Service Plan IEP/IFSP screen • <u>End Timeline</u>: Opens the End Timeline screen
🔹 Date	<i>TrnPartCtoPartBNotificationDate, ScrReferralforScreeningDate, EvlReferralforEvaluationDate, ESEEligibilityDate, IEPIFSPDate, EndDate</i>	The date that the event occurred. This date is entered at the time the event is created. It can be edited on the detail screen. Editing the event date on the detail screen also changes the date of the event on the Timeline.
🔹 AN	<i>TrnActionNeeded-Flag</i>	Displays “Yes”, which indicates that an Action Needed has been created for that event.

Part C to Part B

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Part C to Part B Notification Date:		Part C to Part B Conference Date:	
05/02/2025		05/02/2025	
Part C Service Coordinator	Date Referral Packet Received from ES	Date of ES Consent For Referral	
	MM/DD/YYYY	MM/DD/YYYY	
Part C Provider	Date of ES Consent For Record Transfer	Parent Participated Part C to Part B Conference	
	MM/DD/YYYY	☐ Yes	
		☐ No	
LEA Participated Part C to Part B Conference	Parent Participation Method	LEA Participation Method	
☐ Yes	-- Select --	-- Select --	
☐ No			
Notes			

Screen Field Name	Actual Field Name	Field Description
♦ Part C to Part B Notification Date	<i>TrnPartCtoPartBNotificationDate</i>	The date that the Early Steps program submits notification, unless parent opts out, for prekindergarten program eligibility determination. Notification is defined as personally identifiable information (child's name, child's date of birth, parent's name, contact information). This field or the <i>ES Part C to Part B Conference Date</i> serves as the main date for this event. One or the other field must be entered to create the event, but both fields are not required.
♦ ES Part C to Part B Conference Date	<i>TrnMeetingDate</i>	The date the Part C to Part B conference is conducted (at least 90 days prior to the child's third birthday or, with the consent of all parties, up to nine months prior to the child's third birthday). The local education agency (LEA) representative must participate at this conference, with parent permission. This field or the <i>Part C to Part B Notification Date</i> serves as the main date for this event. One or the other field must be entered to create the event, but both fields are not required.
♦ Part C Service Coordinator	<i>TrnPartCServCoord</i>	Part C Service Coordinator at the time the child moves from Part C to Part B services.
♦ Date Referral Packet Received from ES	<i>TrnRefPacketReceivedDate</i>	The date of receipt of formal referral information from Part C Early Steps.
♦ Date of ES Consent for Referral	<i>TrnConsentForReferralDate</i>	The date of receipt by Part C Early Steps of parent consent to refer the child to the school system for move from Part C to Part B.
♦ Part C Provider	<i>TrnPartCProvider</i>	Part C Service Provider at the time the child moves from Part C to Part B services.

Screen Field Name	Actual Field Name	Field Description
♦ Date of ES Consent for Record Transfer	<i>TrnConsentRecordTransferDate</i>	The date of receipt by Part C Early Steps of parent consent to transfer the child's records.
+ Parent Participated Part C to Part B Conference	<i>TrnParentNotAtConference</i>	Whether the parent participated in the Part C to Part B conference.
+ LEA Participated Part C to Part B Conference	<i>TrnLEANotAtConference</i>	Whether the LEA participated in the Part C to Part B conference.
■ Parent Participation Method	<i>TrnParentParticipationMethod</i>	Parent participation method. Drop-down options include the following: • <u>In Person</u> • <u>Phone Conference</u> • <u>Virtual</u> • <u>Other</u>
■ LEA Participation Method	<i>TrnLEAParticipationMethod</i>	LEA participation method. Drop-down options include the following: • <u>In Person</u> • <u>Not Invited</u> • <u>Phone Conference</u> • <u>Virtual</u> • <u>Other</u>
♦ Notes	<i>TrnNote</i>	Any information received at the time of the Part C to Part B planning that needs to be noted in the record.

Screening

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Concerns at Time of Screening

Primary

Hearing Concerns

Secondary I

-- Select --

Secondary II

-- Select --

Referral For Screening Date:

01/15/2026

Interpreter Used

☒ Yes
 ☐ No

Date of Final Result:

01/20/2026

Final Screening Result:

F

Screening	P/F	Date	PRVD	Location
Adaptive	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Behavior	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Cognition	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Development	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Hearing	F	01/19/2026	#163	At your child's preschool
Language	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Motor	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Observation	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Parent Conf/Rprt	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Prof. Report	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Record Review	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Social/Emotional	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Speech	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --
Vision	-- S€ --	MM/DD/YYYY	-- Select --	-- Select --

Instruments Used:

Screen Field Name	Actual Field Name	Field Description
● Concerns at Time of Screening (Primary)	<i>ScrPresentingProblem1</i>	Primary area of developmental concern at the time of the referral for screening. Drop-down options include the following: • <u>Cognitive concerns</u> • <u>Developmental concerns</u> • <u>Health concerns</u> • <u>Hearing concerns</u> • <u>Language concerns</u> • <u>Motor concerns</u> • <u>Sensory concerns</u> • <u>Social/Personal concerns</u> • <u>Speech concerns</u> • <u>Vision concerns</u>
● Secondary I	<i>ScrPresentingProblem2</i>	Additional area of developmental concern at the time of the referral for screening. Drop-down list includes same options as Concerns at Time of Screening (Primary).
● Secondary II	<i>ScrPresentingProblem3</i>	Additional area of developmental concern at the time of the referral for screening. Drop-down list includes same options as Concerns at Time of Screening (Primary).
◆ Referral for Screening Date	<i>ScrReferral-ForScreeningDate</i>	The date the center has gathered enough information to determine that a screening is appropriate.
◆ Date of Final Result	<i>ScrFinalScreening-ResultDate</i>	The date the final result of the screening was decided. This field is required.
● Final Screening Result	<i>ScrFinalScreening-Result</i>	Final screening result based on screening instrument protocol. Drop-down options include the following: • <u>P</u>: Passed • <u>F</u>: Failed/Could Not Assess • <u>A</u>: At Risk • <u>N</u>: No Screening Attempted
+ Interpreter Used	<i>ScrInterpreterUsed</i>	Interpreter used during screening
● P/F	<i>Refer to appropriate screening type for P/F field.</i>	Screening result based on screening instrument protocol. Drop-down list includes the same options as Final Screening Result.

◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
◆ Date	<i>Refer to appropriate screening type for Date field.</i>	The date that the records were reviewed or the screening took place.
▲ PRVD	<i>Refer to appropriate screening type for PRVD field.</i>	The person or agency responsible for providing the records for review.
▲ Location	<i>Refer to appropriate screening type for Location field.</i>	The location where the screening took place.
Adaptive	<i>ScrAdaptivePF ScrAdaptiveDate ScrAdaptivePrvd ScrAdaptiveLocation</i>	Adaptive screening using appropriate tool(s) related to the referring concerns.
Behavior	<i>ScrBehaviorPF, ScrBehaviorDate, ScrBehaviorPrvd, ScrBehaviorLocation</i>	Behavioral screening using appropriate tool(s) related to the referring concerns.
Cognition	<i>ScrCognitionPF, ScrCognitionDate, ScrCognitionPrvd, ScrCognitionLocation</i>	Cognitive screening using appropriate tool(s) related to the referring concerns.
Development	<i>ScrDevelopPF, ScrDevelopDate, ScrDevelopPrvd, ScrDevelopLocation</i>	Developmental screening using appropriate tool(s) related to the referring concerns.
Hearing	<i>ScrHearingPF, ScrHearingDate, ScrHearingPrvd, ScrHearingLocation</i>	Hearing screening using appropriate tool(s) related to the referring concerns.
Language	<i>ScrLanguagePF, ScrLanguageDate, ScrLanguagePrvd, ScrLanguageLocation</i>	Language screening using the appropriate tool(s) related to the referring concerns.
Motor	<i>ScrMotorPF, ScrMotorDate, ScrMotorPrvd, ScrMotorLocation</i>	Motor (gross and/or fine) screening using the appropriate tool(s) related to the referring concerns.

◆ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
Observation	<i>ScrObsrvPF, ScrObsrvDate, ScrObsrvPrvd, ScrObsrvLocation</i>	Observation of the child related to the referral concerns conducted in the school, home, or other location.
Parent Conf/Rprt	<i>ScrParentCnfPF, ScrParentCnfDate, ScrParentCnfPrvd, ScrParentCnfLocation</i>	Face-to-face or telephone conference with parent(s) or legal guardian(s) relevant to the referral request.
Prof. Report	<i>ScrProfRprtPF, ScrProfRprtDate, ScrProfRprtPrvd, ScrProfRprtLocation</i>	Written report(s) provided by a professional who has knowledge of the child and the referral concerns.
Record Review	<i>ScrRcrdRevPF, ScrRcrdRevDate, ScrRcrdRevPrvd, ScrRcrdRevLocation</i>	Review of printed or electronic child records relevant to the referral request.
Social/Emotional	<i>ScrSocialEmPF ScrSocialEmDate ScrSocialEmPrvd ScrSocialEmLocation</i>	Social/Emotional screening using the appropriate tool(s) related to the referring concerns.
Speech	<i>ScrSpeechPF, ScrSpeechDate, ScrSpeechPrvd, ScrSpeechLocation</i>	Speech screening using the appropriate tool(s) related to the referring concerns.
Vision	<i>ScrVisionPF, ScrVisionDate, ScrVisionPrvd, ScrVisionLocation</i>	Vision screening using appropriate tool(s) related to the referring concerns.
♦ Instruments Used	<i>ScrInstrumentsUsed</i>	Instruments used for screening.

Evaluation

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

Concerns at Time of Evaluation

Primary

Hearing Concerns

Secondary I

-- Select --

Secondary II

-- Select --

Referral Date:

01/27/2026

Completion Date:

01/29/2026

Interpreter Used

☒ Yes
 ☐ No

Parent Consent Date:

01/27/2026

Consent Received Date:

01/28/2026

Evaluation	Comp Date	RR*	Report Rcvd	Diagnostician
Adaptive	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Audiological	01/29/2026	☐	01/30/2026	ABCTest, Two
Behave Observ	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Communication	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Developmental	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Educational	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Emotional/Behav	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Function Vision	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Intellectual	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Language	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Medical	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Motor	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Soc Dev Hst	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Speech	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --
Vision	MM/DD/YYYY	☐	MM/DD/YYYY	-- Select --

Instruments Used:

◆ Free text field

▲ Automatically calculated field

● State-defined drop-down list

▲ Locally defined drop-down list

♥ Display only field

♣ Button option

■ Check box field

⊕ Radio button

Screen Field Name	Actual Field Name	Field Description
● Concerns at Time of Evaluation (Primary)	<i>EvlPresentingProblem1</i>	Primary area of developmental concern at the time of the referral for evaluation. Drop-down options include the following: • <u>Cognitive concerns</u> • <u>Developmental concerns</u> • <u>Health concerns</u> • <u>Hearing concerns</u> • <u>Language concerns</u> • <u>Motor concerns</u> • <u>Sensory concerns</u> • <u>Social/Personal concerns</u> • <u>Speech concerns</u> • <u>Vision concerns</u>
● Secondary I	<i>EvlPresentingProblem2</i>	Additional area of developmental concern at the time of the referral for evaluation. Drop-down list includes same options as Concerns at Time of Screening (Primary).
● Secondary II	<i>EvlPresentingProblem3</i>	Additional area of developmental concern at the time of the referral for evaluation. Drop-down list includes same options as Concerns at Time of Screening (Primary).
◆ Referral Date	<i>EvlReferralForEvaluationDate</i>	The date the formal referral for evaluation is made.
◆ Parent Consent Date	<i>EvlParentConsentForEval</i>	The date the parent signed the informed consent for the evaluation.
◆ Completion Date	<i>EvlFinalEvalDate</i>	The date of the last evaluation used for determination of eligibility. Evaluations including Record Review can occur on different dates, but this date is the date of the last evaluation report received for determination of eligibility or the date of the multidisciplinary report.
◆ Consent Received Date	<i>EvlConsentReceivedForEvalDate</i>	The date the parent consented to the evaluation.
+ Interpreter Used	<i>EvlInterpreterUsed</i>	Interpreter was used at evaluation.

Screen Field Name	Actual Field Name	Field Description
♦ Comp Date	<i>Refer to the appropriate evaluation type for the Completed Date (Completed) field.</i>	The date the evaluation was completed. In cases where the evaluation was conducted over a period of days, the last day should be the date entered.
■ RR	<i>Refer to the appropriate evaluation type for the Record Review (Record Review) field.</i>	Review of printed or electronic child records relevant to the referral request.
♦ Report Rcvd	<i>Refer to the appropriate evaluation type for the Report Received (RR) field.</i>	The date the report was received by the diagnostician.
▲ Diagnostician	<i>Refer to the appropriate evaluation type for the Diagnostician (Diag) field.</i>	The professional conducting the assessment.
Adaptive	<i>EvlAdaptiveCompleted, EvlAdaptiveRecordReview, EvlAdaptiveRR, EvlAdaptiveDiag</i>	Evaluation of social/adaptive behavior using appropriate tool(s) based on referral concerns.
Audiological	<i>EvlAudiologCompleted, EvlAudiologRecordReview, EvlAudiologRR, EvlAudiologDiag</i>	Evaluation of hearing using appropriate tool(s) based on referral concerns.
Behave Observ	<i>EvlBehObsrvCompleted, EvlBehObsrvRecordReview, EvlBehObsrvRR, EvlBehObsrvDiag</i>	Behavioral observation using appropriate tool(s) based on referral concerns.
Communication	<i>EvlCommunCompleted, EvlCommunRecordReview, EvlCommunRR, EvlCommunDiag</i>	Evaluation of communication skills using appropriate tool(s) based on referral concerns.

♦ Free text field ▲ Automatically calculated field ● State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

Screen Field Name	Actual Field Name	Field Description
Developmental	<i>EvlDevelopmentalCompleted,</i> <i>EvlDevelopmentalRecordReview,</i> <i>EvlDevelopmentalRR,</i> <i>EvlDevelopmentalDiag</i>	Developmental evaluation using appropriate tool(s) related to the referring concerns.
Educational	<i>EvlEducationCompleted,</i> <i>EvlEducationRecordReview,</i> <i>EvlEducationRR,</i> <i>EvlEducationDiag</i>	Pre-academic evaluation using appropriate tool(s) based on referral concerns. The Battelle Developmental Inventory-2 should be entered into CHRIS as an educational evaluation.
Emotional/Bhav	<i>EvlEmBhvrCompleted,</i> <i>EvlEmBhvrRecordReview,</i> <i>EvlEmBhvrRR,</i> <i>EvlEmBhvrDiag</i>	Evaluation of emotional behavior using appropriate tool(s) based on referral concerns.
Function Vision	<i>EvlFuncVsnCompleted,</i> <i>EvlFuncVsnRecordReview,</i> <i>EvlFuncVsnRR,</i> <i>EvlFuncVsnDiag</i>	Evaluation of functional vision using appropriate tool(s) based on referral concerns.
Intellectual	<i>EvlIntellectCompleted,</i> <i>EvlIntellectRecordReview,</i> <i>EvlIntellectRR,</i> <i>EvlIntellectDiag</i>	Intellectual evaluation using appropriate tool(s) based on referral concerns.
Language	<i>EvlLanguageCompleted,</i> <i>EvlLanguageRecordReview,</i> <i>EvlLanguageRR,</i> <i>EvlLanguageDiag</i>	Evaluation of language using appropriate tool(s) based on referral concerns.
Medical	<i>EvlMedicalCompleted,</i> <i>EvlMedicalRecordReview,</i> <i>EvlMedicalRR,</i> <i>EvlMedicalDiag</i>	Evaluation performed by a medical professional using appropriate tool(s) based on referral concerns.

Screen Field Name	Actual Field Name	Field Description
Motor	<i>EvIMotorCompleted, EvIMotorRecordReview, EvIMotorRR, EvIMotorDiag</i>	Motor evaluation using appropriate tool(s) based on referral concerns.
Soc Dev Hst	<i>EvISocDevHCompleted, EvISocDevHRecordRe- view, EvISocDevHRR, EvISocDevHDiag</i>	Record of the child's social/ developmental history gathered directly from the parent or guardian using appropriate tool(s) based on referral concerns.
Speech	<i>EvAdaptiveCompleted, EvAdaptiveRecordRe- view, EvSpeechRR, EvSpeechDiag</i>	Speech evaluation using the appropriate tool(s) based on referral concerns.
Vision	<i>EvIVisionCompleted, EvIVisionRecordReview, EvIVisionRR, EvIVisionDiag</i>	Vision evaluation using the appropriate tool(s) based on referral concerns.
♦ Instruments Used	<i>EvInstrumentsUsed</i>	Instruments used for evaluation. Evaluation instruments, such as the Battelle Developmental Inventory-2, can be indicated in this field.

ESE Eligibility

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

ESE Eligibility Date:

Exceptionality Status:

☐ Occupational Therapy
☐ Physical Therapy
☐ Language Therapy
☐ Speech Therapy

Primary Exceptionality (Select One)

☐ ASD (P)
☐ DSI (O)
☒ HH (M)
☐ OI (C)
☐ SI (F)
☐ DNQ (Z)

☐ DHH (H)
☐ EBD (J)
☐ InD (W)
☐ OHI (V)
☐ TBI (S)

☐ DD (T)
☐ EC (U)
☐ LI (G)
☐ SLD (K)
☐ VI (I)

Secondary Exceptionality (Select as many as necessary)

☐ Autism Spectrum Disorder (P)
☐ Deaf or Hard of Hearing (H)
☐ Developmentally Delayed (T)
☐ Dual Sensory Impaired (O)

☐ Emotional/Behavioral Disability (J)
☐ Established Condition (U)
☐ Hospital / Homebound (M)
☐ Intellectual Disability (W)

☐ Language Impaired (G)
☐ Specific Learning Disabled (K)
☐ Speech Impaired (F)
☐ Visually Impaired (I)

Physically Impaired with:

☐ Orthopedic Impairment (C)
☐ Other Health Impairment (V)
☐ Traumatic Brain Injury (S)

Screen Field Name	Actual Field Name	Field Description
♦ ESE Eligibility Date	ESEEligibilityDate	The date the determination of eligibility or ineligibility was made.

Screen Field Name	Actual Field Name	Field Description
♣ Exceptionality Status	<i>ESEExceptionality-StatusCalc</i>	Indicates the child's status regarding eligibility for an IDEA Part B program. Options include the following: • <u>E</u>: Eligible. Child has been determined eligible for an IDEA Part B exceptionality program. Primary Exceptionality has been selected within the ESE Eligibility event. • <u>I</u>: Ineligible. Child has been determined ineligible for Part B services. • <u>N</u>: Not Determined. An Evaluation event exists, but no ESE Eligibility event has been created. Status remains "N" until an ESE Eligibility event has been created.
■ Occupational Therapy	<i>ESEOccupational-Therapy</i>	Indicates whether child meets Part B criteria for Occupational Therapy.
■ Physical Therapy	<i>ESEPhysicalTherapy</i>	Indicates whether child meets Part B criteria for Physical Therapy.
■ Language Therapy	<i>ESELanguageTh-erapy</i>	Indicates whether child meets Part B criteria for Language Therapy.
■ Speech Therapy	<i>ESESpeechTherapy</i>	Indicates whether child meets Part B criteria for Speech Therapy.

Screen Field Name	Actual Field Name	Field Description
+ Primary Exceptionality	<i>ESEPrimaryExceptionality</i>	Eligibility status according to Part B guidelines. Only one primary exceptionality can be designated. Exceptionality status automatically changes to “E” for Exceptional if a primary exceptionality is chosen. Options include the following: • <u>ASD (P)</u>: Autism Spectrum Disorder • <u>DHH (H)</u>: Deaf or Hard of Hearing • <u>DD (T)</u>: Developmentally Delayed • <u>DSI (O)</u>: Dual Sensory Impaired • <u>EBD (J)</u>: Emotional/ Behavioral Disability • <u>EC (U)</u>: Established Conditions (for Part C only) • <u>HH (M)</u>: Hospital / Homebound • <u>InD (W)</u>: Intellectual Disability • <u>LI (G)</u>: Language Impaired • <u>OI (C)</u>: Physically Impaired with Orthopedic Impairment • <u>OHI (V)</u>: Physically Impaired with Other Health Impairment • <u>SLD (K)</u>: Specific Learning Disability • <u>SI (F)</u>: Speech Impaired • <u>TBI (S)</u>: Physically Impaired with Traumatic Brain Injury • <u>VI (I)</u>: Visually Impaired • <u>DNQ (Z)</u>: Does Not Qualify (If selected, Exceptionality Status changes to “I”)

Screen Field Name	Actual Field Name	Field Description
■ Secondary Exceptionality	<i>ESEASD, ESEDearforHardofHearing, ESEDevelopmentallyDelayed, ESEDualSensoryImpaired, ESEEmotionalBehavioralDisability, ESEEstablishedConditions, ESEHospitalHomebound, ESEIntellectualDisability, ESELanguagelyImpaired, ESEOrthopedicallyImpaired, ESEOtherHealthImpaired, ESESpeciallyLearningDisabled, ESESpeciallySpeechImpaired, ESETraumaticBrainInjured, ESEVisuallyImpaired</i>	Eligibility status according to Part B criteria. More than one secondary exceptionality can be designated.

Part B Service Plan IEP/IFSP

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

IEP/IFSP Date:		Parent Consent for Placement Date:	
06/18/2021		06/18/2021	
Service Initiation Date	Educational Env.	Service Location	Service Type
06/18/2021	-- Select --	-- Select --	-- Select --
MM/DD/YYYY	-- Select --	-- Select --	-- Select --

Screen Field Name	Actual Field Name	Field Description
♦ IEP/IFSP Date	<i>IEPIFSPDate</i>	The date of the IEP or IFSP meeting following eligibility determination.
♦ Parent Consent for Placement Date	<i>IEPIFSPParentConsentDate</i>	The date the parent signed the informed consent for Part B services.
♦ Service Initiation Date	<i>IEPIFSPServiceInitiatedDate1,</i> <i>IEPIFSPServiceInitiatedDate2</i>	The date the service described in the plan begins or was scheduled to begin.
• Educational Environment	<i>IEPIFSPEducationalEnvironment1,</i> <i>IEPIFSPEducationalEnvironment2</i>	Specific service for which the child has been determined eligible and through which the child receives direct or indirect service. This is not the program, school, or placement in which the child is served, but rather the agency or provider authorizing the service. Drop-down options include the following: • Early Learning Coalition • Head Start • Migrant Pre-K • Not Applicable • Public Pre-K Disabilities • Public Kindergarten • Public School • Subsidized • Title 1 Pre-K • VPK (Voluntary Pre-K)
▲ Service Location	<i>IEPIFSPServiceLocation1,</i> <i>IEPIFSPServiceLocation2</i>	The location where authorized services are to be implemented. This may be a day care center, school, hospital, home, or other service location where authorized services are provided to the child.
• Service Type	<i>IEPIFSPServiceType1,</i> <i>IEPIFSPServiceType2</i>	Refers to the service delivery system. Drop-down options include the following: • Contracted • Co-Operative Agreement • Public School

♦ Free text field ▲ Automatically calculated field • State-defined drop-down list ▲ Locally defined drop-down list
 ♥ Display only field ♣ Button option ■ Check box field + Radio button

End Timeline

The fields at the top of the screen are defined in the Header section of the **Tracking** screen (see page 29). The fields at the bottom of the screen are defined in the Footer section of the **Tracking Summary** screen (see page 31).

End Timeline Date:

06/18/2021

Reason

Unable to locate child

Notes

Screen Field Name	Actual Field Name	Field Description
♦ End Timeline Date	<i>EndDate</i>	The date the current timeline was ended.
• Reason	<i>EndReason</i>	Reason the current timeline was ended. Drop-down options include the following: • <u>Deceased</u> • <u>Entered Kindergarten</u> • <u>IEP/IFSP developed</u> • <u>Ineligible for Part B services</u> • <u>Ineligible for Part C services</u> • <u>Moved out of service area</u> • <u>No parent response/No show</u> • <u>Parent declined services</u> • <u>Parent provided information</u> • <u>Passed screening</u> • <u>Referred to appropriate agency</u> • <u>Unable to locate child</u>
♦ Notes	<i>EndNotes</i>	Additional information regarding the End Timeline event.

♦ Free text field ♦ Automatically calculated field • State-defined drop-down list ▲ Locally defined drop-down list
♥ Display only field ♣ Button option ■ Check box field + Radio button

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