

Examples from EID's Data Management System

Example - Grid View – On screen

Behavioral Health						
Student Services SS Student Guardian Form Training/Help Guides BH-Behavior Incident Rep BH Behavioral Visits						
+ Add BH Behavioral Visit						
The view has changed. You may save as new view.						
Please select St... Search Search BH Behavioral Visit:						
Drag a column header here and drop it to group by that column.						
Contact Date	Reason for Visit (Incident Type)	If Reason for Visit is Other, please specify	Length of Visit	Primary Service Provided/Activity Type	Was an outside referral made?	
01/17/2025	Mental Health Check-In		60 Minutes	Check-In (Structured)	No	
01/10/2025	Assessment/Observation		15 Minutes or less	Initial Contact	No	
01/13/2025	Anxiety/Depression		60 Minutes	Parent Contact (Meeting or...	No	
01/15/2025	Anxiety/Depression		30 Minutes	Parent Contact (Meeting or...	No	
01/16/2025	Mental Health Check-In, In...		30 Minutes	Check-In (Structured)	No	
01/16/2025	Mental Health Check-In		30 Minutes	Check-In (Structured)	No	

Example – Grid View – Exported to Excel

Contact Date	Reason For Visit (Incident Type)	If Reason For Visit Is Other, Please Specify	Length Of Visit	Primary Service Provided/Activity Type	Was An Outside Referral Made?
1/17/2025	Mental Health Check-In		60 Minutes	Check-In (Structured)	No
1/10/2025	Assessment/Observation		15 Minutes or less	Initial Contact	No
1/13/2025	Anxiety/Depression		60 Minutes	Parent Contact (Meeting or Phone)	No
1/15/2025	Anxiety/Depression		30 Minutes	Parent Contact (Meeting or Phone)	No
1/16/2025	Mental Health Check-In		30 Minutes	Check-In (Structured)	No
1/16/2025	Mental Health Check-In		30 Minutes	Check-In (Structured)	No

EXAMPLE – Filter Process

Filter for select records matching...

Field: Condition: Value:

Please select St... is

Custom Filter for your linked form "Student Services" for select records matching...

Field: Condition: Value:

Student Legal M... is Demo

Add a Filter

Add a Filter

Group

All

Any

Field

Record ID

Record Title

Folder

Created By User

Date Created

Last Edited

Draft

Please select Student's Name, if it exists in the system. (Linked to main student intake form)

Field Notes: (examples - Student First / Last Name, grade, DOB - enter information needed to link to the appropriate student in Student Services)

Contact Date

Reason for Visit (Incident Type)

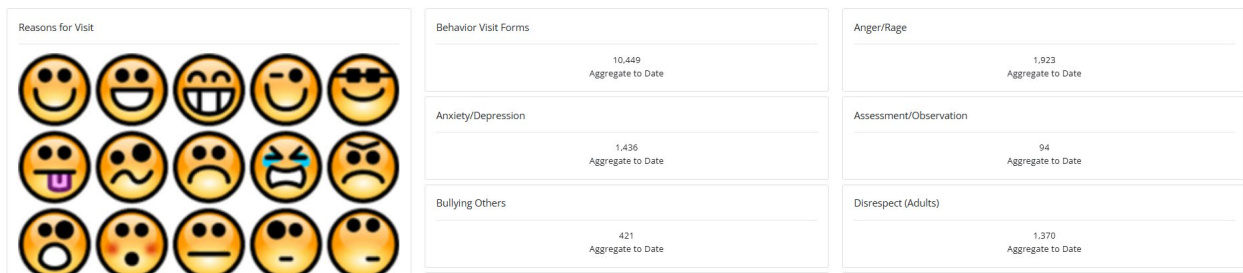
If Reason for Visit is Other, please specify

Length of Visit

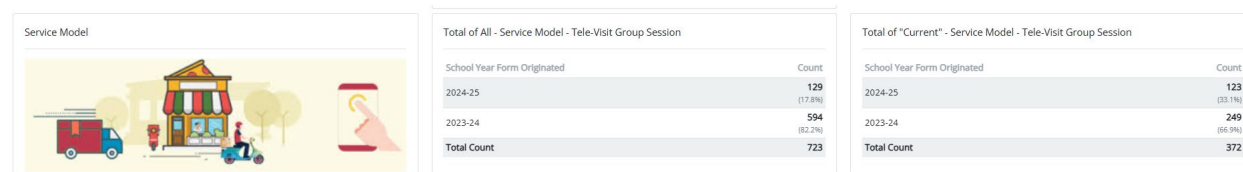
If Length of Visit is Other, please specify in total MINUTES

Primary Service Provided/Activity Type

Example – From Behavior Services Dashboard



Example – From Speech Services Dashboard



Example – Summary Widgets from a Preschool Promise Dashboard



Example – Transfer Dashboard

