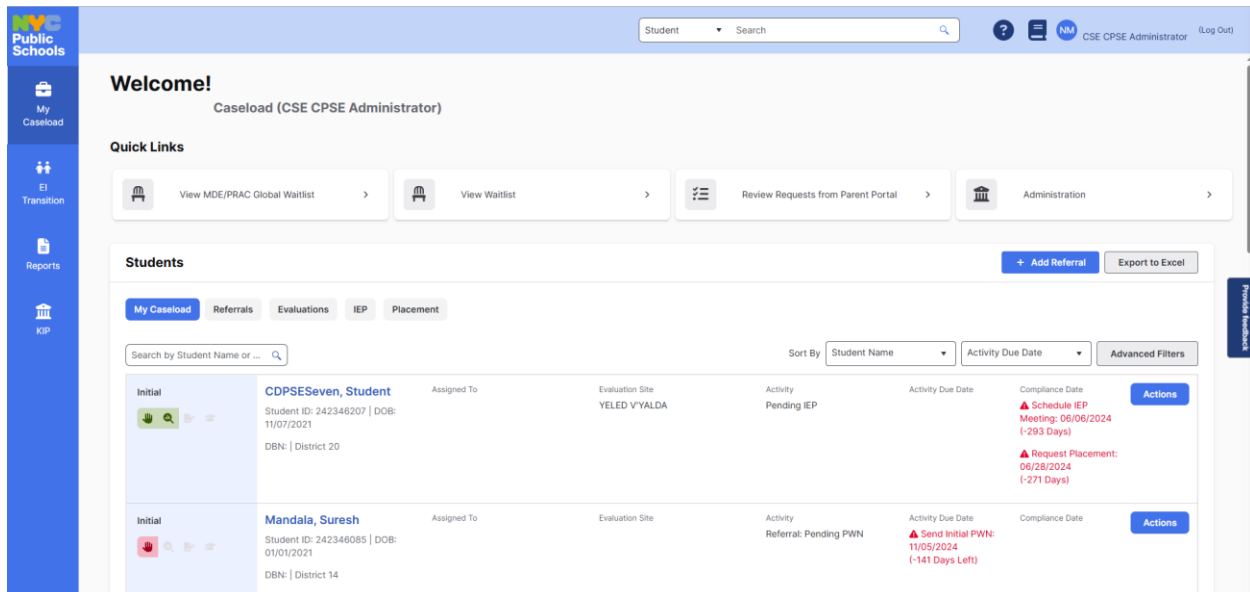


# How to Navigate the Dashboard

This guide provides a comprehensive overview of how to navigate the Dashboard in ATLAS. It covers everything from logging in to filtering and sorting students, expanding student profiles, searching for students, utilizing advanced filters, exporting data to Excel, accessing help links, and adding new referrals.

**Note:** Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.

1. After you log into ATLAS, you will be directed to your dashboard. The dashboard is your main workspace in ATLAS. It shows all students on your caseload and is where you'll begin most of the work you do in ATLAS. Your dashboard may look slightly different from the images below depending on your user type in ATLAS.



**Welcome!**  
Caseload (CSE CPSE Administrator)

**Quick Links**



- View MDE/PRAC Global Waitlist
- View Waitlist
- Review Requests from Parent Portal
- Administration

**Students**

+ Add Referral | Export to Excel

My Caseload | Referrals | Evaluations | IEP | Placement

Search by Student Name or ... | Sort By: Student Name | Activity Due Date | Advanced Filters

Initial	Student Name	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	<b>CDPSESeven, Student</b> Student ID: 242346207   DOB: 11/07/2021 DBN: District 20		YELED V'YALDA	Pending IEP		<p>▲ Schedule IEP Meeting: 06/06/2024 (-293 Days)</p> <p>▲ Request Placement: 06/28/2024 (-271 Days)</p>	<a href="#">Actions</a>
	<b>Mandala, Suresh</b> Student ID: 242346085   DOB: 01/01/2021 DBN: District 14			Referral: Pending PWN		<p>▲ Send Initial PWN: 11/05/2024 (-141 Days Left)</p>	<a href="#">Actions</a>

2. Your username and title appear in the top right corner of the dashboard.

**Welcome!**  
Sedms3 Sedms's Caseload (CSE Supervisor of Psychologist)

**Quick Links**

- View MDE/PRAC Global Waitlist
- View Waitlist
- Review Requests from Parent Portal
- Administration

**Students**

Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ...

Sort By Student Name Activity Due Date Advanced Filters

Initial	Student ID	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
Initial	ETASTA78, ENFIF71 Student ID: 250125921   DOB: 03/18/2021 DBN: 88M801   District 09	Jillian Getter	VOLUNTEERS OF AMERICA GREATER	IEP In Draft	Finalize IEP: 02/05/2025 (-60 Days Left)	Request Placement: 10/29/2021 (-1255 Days)	Actions
Reconvene	IAMAM76, ATROTRO67 Student ID: 260907738   DOB: 02/12/2021 DBN: 09X700   District 09	Jennifer Lopez		IEP In Draft	Finalize IEP: 02/23/2024 (-408 Days Left)		Actions
Reconvene	ANYRONY72, ALIOTIILO67 Student ID: 260907738   DOB: 02/12/2021 DBN: 09X700   District 09	Lourdes Lopez		IEP In Draft	Finalize IEP: 02/23/2024 (-408 Days Left)		Actions

- You can perform most student actions from the dashboard. There are some functions, such as reporting or EI Transition, for which you will need to navigate to other pages within ATLAS. These are available in the blue vertical menu on the left side of your screen.

**Welcome!**  
Sedms3 Sedms's Caseload (CSE Supervisor of Psychologist)

**Quick Links**

- View MDE/PRAC Global Waitlist
- View Waitlist
- Review Requests from Parent Portal
- Administration

**Students**

Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ...

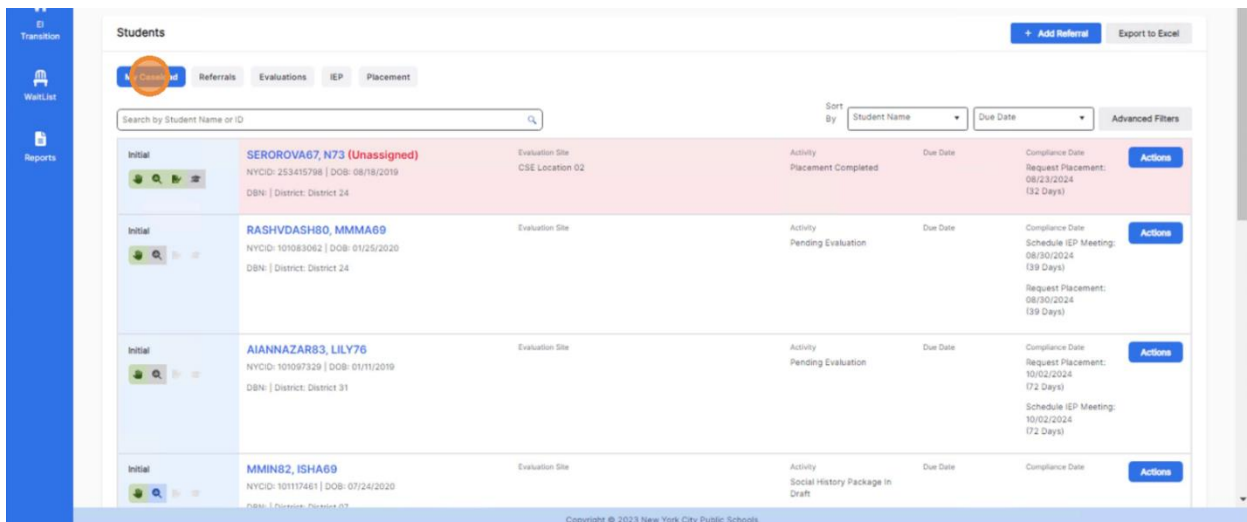
Sort By Student Name Activity Due Date Advanced Filters

Initial	Student ID	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
Initial	ETASTA78, ENFIF71 Student ID: 250125921   DOB: 03/18/2021 DBN: 88M801   District 09	Jillian Getter	VOLUNTEERS OF AMERICA GREATER	IEP In Draft	Finalize IEP: 02/05/2025 (-60 Days Left)	Request Placement: 10/29/2021 (-1255 Days)	Actions
Reconvene	IAMAM76, ATROTRO67 Student ID: 260907738   DOB: 02/12/2021 DBN: 09X700   District 09	Jennifer Lopez		IEP In Draft	Finalize IEP: 02/23/2024 (-408 Days Left)		Actions
Reconvene	ANYRONY72, ALIOTIILO67 Student ID: 260907738   DOB: 02/12/2021 DBN: 09X700   District 09	Lourdes Lopez		IEP In Draft	Finalize IEP: 02/23/2024 (-408 Days Left)		Actions

**Note:** The options in the blue vertical menu will differ based on your role and the functionalities you have access to in ATLAS.

- At the top of your dashboard you'll see the the Quick Links section. The Quick Links section contains four links:
  - View MDE/PRAC Global Waitlist

- This is a global list of students awaiting assignment to any MDE or PRAC
  - View Waitlist
    - This is an MDE or PRAC specific list of students awaiting an appointment with the evaluation team associated with the user login.  
Ex: If I am logged in as a user associated with CPSE 1 I will only see students awaiting an evaluation appointment with CPSE 1
  - Review Request from Parent Portal
    - This is a list of requests that have been submitted through the Parent Portal, such as request for additional assessment or request for re-evaluation
  - Administration
    - This button directs users to the MDE Agency List page where users can view or edit agency information.
5. The **My Caseload** button is selected by default when you arrive at your dashboard and will be shown in blue. It means that you're seeing only students assigned to you, regardless of where they are in the process.
6. If you click the **My Caseload** button again to deselect it (it will turn gray), this will show you all students you have access to, including those not assigned to you.
- *School-based Users:* You'll see all students in your school's DBN
  - *CSE/CPSE Users:* You'll see all students within your CSE.



Initial	Student Name	Evaluation Site	Activity	Due Date	Compliance Date	Actions
	<b>SEROROVA67, N73 (Unassigned)</b> NYCID: 253415798   DOB: 08/18/2019 DBN: District 24	CSE Location 02	Placement Completed		Request Placement: 08/23/2024 (32 Days)	<a href="#">Actions</a>
	<b>RASHVDASH80, MMA69</b> NYCID: 101083062   DOB: 01/25/2020 DBN: District 24	Evaluation Site	Pending Evaluation		Schedule IEP Meeting: 08/30/2024 (39 Days) Request Placement: 08/30/2024 (39 Days)	<a href="#">Actions</a>
	<b>AIANNAZAR83, LILY76</b> NYCID: 101097329   DOB: 01/11/2019 DBN: District 31	Evaluation Site	Pending Evaluation		Request Placement: 10/02/2024 (72 Days) Schedule IEP Meeting: 10/02/2024 (72 Days)	<a href="#">Actions</a>
	<b>MMIN82, ISHA69</b> NYCID: 10117461   DOB: 07/24/2020 DBN: District 07	Evaluation Site	Social History Package in Draft			<a href="#">Actions</a>

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7. To navigate through the pages, use the page numbers or the left/right arrow icons at the bottom of the dashboard.

Initial	Student Name	NYCID	DOB	DBN	District	Evaluation Site	Status
Initial	OMAN71, EAMA78	203757083	05/14/2020	DBN:   District: District 17	District 17	Hebrew Institute The Deaf & Excp.	A S C
Initial	OMAN71, EAMA78	203757083	05/14/2020	DBN:   District: District 17	District 17	Hebrew Institute The Deaf & Excp.	A S C
Initial	RRIS77, MMIR83	203912084	05/29/2020	DBN:   District: District 18	District 18	Hebrew Institute The Deaf & Excp.	A S C
Initial	ORT83, LANI78	203958723	04/24/2020	DBN:   District: District 18	District 18	Hebrew Institute The Deaf & Excp.	A S C

- To filter students by caseload process (e.g., Referral, Evaluation, IEP, etc.), use the buttons at the top left of the dashboard.

For example: In this view, the user has selected both the **My Caseload** and the **Referrals** buttons. Selected buttons turn blue; deselected buttons turn grey, as Evaluation, IEP and Placement are in this image. The dashboard is filtered by My Caseload and Referrals, showing all students in the user's caseload who are currently in the Referral phase of the Special Education process.

Initial	Student Name	NYCID	DOB	DBN	District	Evaluation Site	Activity	Referral	Due Date	Compliance Date	Actions
Initial	EDYNNED75, CLANILLAN77	222826109	06/02/2019	DBN:   District: District 27	District 27	Hebrew Institute The Deaf & Excp.	Referral: Pending PWN				Actions
Initial	Parker, Egghead	230100578	01/01/2020	DBN:   District: District:	District:	Hebrew Institute The Deaf & Excp.	Referral: Draft				Actions
Initial	Parker, Icecream	230100617	01/01/2020	DBN:   District: District:	District:	Hebrew Institute The Deaf & Excp.	Referral: Schedule SHM			Send Initial PWN: 05/29/2024 (1-54 Days)	Actions
Initial	TrainingFive, Anna	230100731	05/01/2020	DBN:   District: District:	District:	Hebrew Institute The Deaf & Excp.	Referral: Draft				Actions
Initial	testing, Junebaby	230101200	01/01/2020	DBN:   District: District:	District:	Hebrew Institute The Deaf & Excp.	Referral: Draft				Actions

- Activated filters are shown by icons in the blue box to the left of each student's row. There are four icons representing stages in the special education process.
  - Referrals:** a hand icon

- **Evaluations:** a magnifying glass
- **IEP:** a document
- **Placement:** a graduation cap
- **Provider Management** and **Encountering** are not yet active in ATLAS but their icons are displayed in the image below as well.

Hover your cursor over one of the icons to see the process stage it represents.

Review the legend below for more information about dashboard colors and icons.







Note / Number

1







Color Legend

For the initial, reevaluation, annual, and triennial stages:







Initial







Reevaluation

Annual

Triennial




















Note / Number

2

Color Legend (cont)

For the process stages (referral, evals, etc.) and their statuses:

 Referrals
  Evaluations
  IEP
  Placement
  Provider Management
  Encountering

 Complete
  Out of Compliance
  At Risk
  Reason for Delay
  In Progress
  Inactive




Note / Number

3

Due Date Legend

For the due dates, there are different colors and icons associated.

In progress, in compliance

 Out of Compliance
  At Risk
  Reason for Delay

For example, all students on this page have the first process stage icon (a hand). This means that each of these students is in the **Referrals** stage.

Students

+ Add Referral Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ID

Sort By Student Name Due Date Advanced Filters

Initial	EDYNNED75, CLANILLAN77	Evaluation Site	Activity Referral: Pending PWN	Due Date	Compliance Date	Actions
	NYCID: 222826109   DOB: 06/02/2019					
	DBN:   District: District 27					
Initial	Parker, Egghead	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	Actions
	NYCID: 230100578   DOB: 01/01/2020					
	DBN:   District:					
Initial	Parker, Icecream	Evaluation Site	Activity Referral: Schedule SHM	Due Date	Compliance Date	Actions
	NYCID: 230100617   DOB: 01/01/2020				Send Initial PWN: 05/29/2024 (-54 Days)	
	DBN:   District:					
Initial	TrainingFive, Anna	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	Actions
	NYCID: 230100731   DOB: 05/01/2020					
	DBN:   District:					
Initial	testing, Junebaby	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	Actions
	NYCID: 230101200   DOB: 01/01/2020					
	DBN:   District:					

10. To search for a student, use either the search bar at the top of the grid or the search bar in the light blue bar at the top of the screen.

NYC Public Schools

Student Search

Sedms9 Sedms CSE CPSE Administrator (Log Out)

Welcome!

Sedms9 Sedms's Caseload (CSE CPSE Administrator)

Quick Links

View MDE/PRAC Global Waitlist View Waitlist Review Requests from Parent Portal Administration

Students

+ Add Referral Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student Name or ...

Sort By Student Name Activity Due Date Advanced Filters

Initial	Student ID: 04/13/2020	DOB: 04/13/2020	Assigned To Unassigned (Assign)	Evaluation Site	Activity IEP Closed	Activity Due Date	Compliance Date	Actions
	DBN: 30Q171   District 30							
Initial	Student ID: 04/09/2020	DOB: 04/09/2020	Assigned To	Evaluation Site CSE Location 01	Activity Pending Placement	Activity Due Date	Compliance Date	Actions
	DBN: 09X053   District 08						Request Placement: 05/15/2024 (-326 Days)	

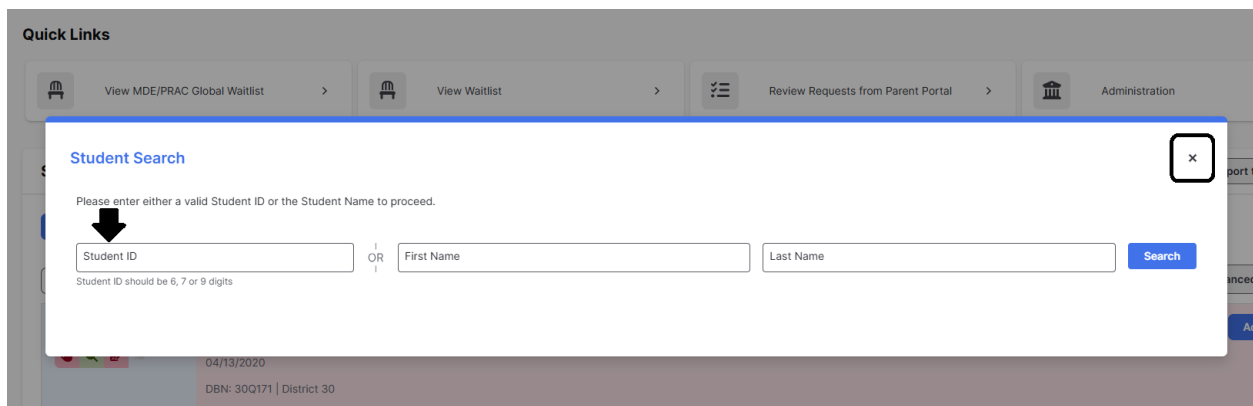
11. Clicking **Student Search** in the light blue bar on the top right of the screen will open the **Student Search** pop up. This search allows users to search all of ATS, meaning it may return search results for students who are not in ATLAS.

For example, since ATLAS currently only includes preschool aged students, a search using the top right search bar might return records for school aged students who are not in ATLAS. Using the top right search bar, a user can search by student ID, or a combination of first name, last name, and DBN.

12. The search box below **My Caseload** allows a user to search all the students who are viewable to them in ATLAS. For some users this will be just the students on their caseload. For users with broader permissions to view students, they might see all the students in their school or district. Users may search by first name, last name, or student ID.

13. For more information on how to search for a student, please review the reference guide, "1.5 How to Search for a Student".

To close the pop-up, click the **X** in the top right corner.



14. Click anywhere on a student's row to expand it and show more details about their current process stage.

For the student below, you can see that they are in the reconvene process and are currently having evaluations completed, and the assessment planning grid shows the various states of evaluations.

You are able to click each icon and toggle between the process steps. For example, you could click **Referrals** or **IEP** to see more info about the student's progress through those stages.

Icons on the left side of the panel also show the student's evaluation requirements.

Reconvene

**UUZZ76, ANEZTINEZ77**  
 Student ID: | DOB:   
 DBN: 88M801 | District 10

Assigned To

Evaluation Site

Activity  
IEP In Draft

Activity Due Date  
 ▲ Finalize IEP:  
 09/06/2024  
 (-212 Days Left)

Compliance Date

Actions

Evaluations

Evaluations Completed  
 ○ Next  
 Complete IEP  

IEP

Referrals

Evaluations

IEP

Placement

Social History Meeting Date  
 Status of Social History Package  
 Consent for Initial Evaluation Given?  
 Yes

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Psychological Assessment	CSE Location 01			07/10/2024	Finalized
Speech and Language Assessment	CSE Location 01			07/10/2024	Finalized
Medical examination				07/10/2024	Finalized
Initial Social History	CSE Location 01			07/10/2024	Finalized

15. When the student's panel is expanded, you'll see the next step in the process as indicated in the blue box on the side.

For example, if the next step is to complete the IEP, it will show as *Next: Complete IEP* under the current step.

Evaluations

Evaluations Completed  
 ○ Next  
 Complete IEP  

IEP

DBN: 88M801 | District 10  
 Referrals Evaluations IEP Placement  
 Social History Meeting Date  
 Status of Social History Package  
 Consent for Initial Evaluation Given?  
 Yes

Assessments In Progress	Agency Name	Evaluator Name	Evaluator Type	Evaluation Due Date	Status
Psychological Assessment	CSE Location 01			07/10/2024	Finalized
Speech and Language Assessment	CSE Location 01			07/10/2024	Finalized
Medical examination				07/10/2024	Finalized
Initial Social History	CSE Location 01			07/10/2024	Finalized

16. To view a student's profile, click on their name in blue.

Students

+ Add Referral  
 Export to Excel

My Caseload

Referrals

Evaluations

IEP

Placement

Search by Student Name or ...  
 Sort By Student Name Activity Due Date Advanced Filters

<div>Initial</div> <div> </div>	<b>ASHSH75, IHAMMINGH66</b> Student ID: DOB: DBN: 30Q171   District 30	Assigned To Unassigned (Assign)	Evaluation Site	Activity IEP Closed	Activity Due Date	Compliance Date	Actions
<div>Initial</div> <div> </div>	<b>DINWIN69, UREZLLOP67</b> Student ID: DOB: DBN: 09X053   District 08	Assigned To 	Evaluation Site CSE Location 01	Activity Pending Placement	Activity Due Date	Compliance Date ▲ Request Placement: 05/15/2024 (-326 Days)	Actions

17. You will be taken to the student's profile. To return to the dashboard, click the **My Caseload** button in the vertical blue navigation menu on the left side of the screen.

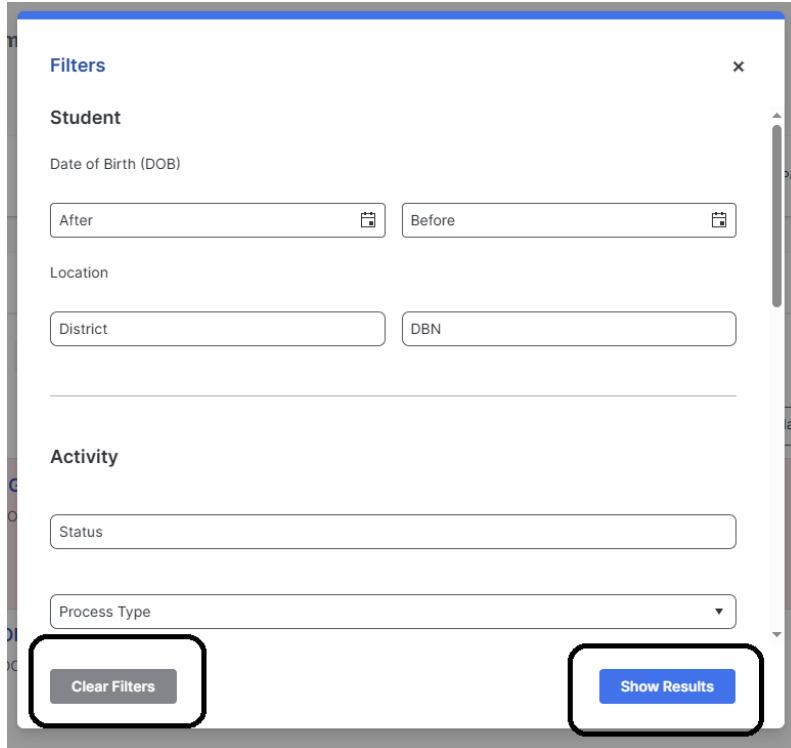


18. Use the drop-down menus in the top right corner of the dashboard to sort students. You can sort alphabetically by student name or by due date. The **Due Date** indicates the date by which the student must be placed (typically, 60 days from date of initial consent).

19. For a more detailed search, use the **Advanced Filters** option. Click **Advanced Filters** in the top right of the dashboard to open more search options.

20. A pop-up titled *Filters* will appear with more options. You can filter by things like the student's date of birth or location.

- After selecting a filter, click **Show Results** in the bottom right corner of the pop-up to apply the filters.
- To clear all filters, click **Clear Filter** in the bottom left of the pop-up.
- To close the pop-up, click the **X** in the top right of the *Filters* pop-up.



21. In the Filters pop-up you can also search by **Activity Status**. This allows you to filter by specific process stages, such as pending actions.

Filters

Activity

Status

IEP: Meetings pending scheduling

IEP: Documents Pending Finalization

Placement: Pending Consent for Initial Provision of Services

Referral Draft

Referral Review

Referral Pending PWN

Out of Compliance

At Risk

30 Days

45 Days

60 Days

Evaluations

22. Use the **Process Type** dropdown to filter by the Process Type.

For example, selecting **Annual Review** will show all students who need their annual review.

Filters

Activity

Status

Process Type

Annual Review

Initial

Reevaluation

Additional Reevaluation

Mandated 3-Year

Annual Review

Reconvene

Evaluations

Clear Filters

Show Results

23. You can also sort the dashboard by *Evaluation Status*, *Evaluation Site*, or *Evaluator Type*.

Filters

60 days

Evaluations

Status

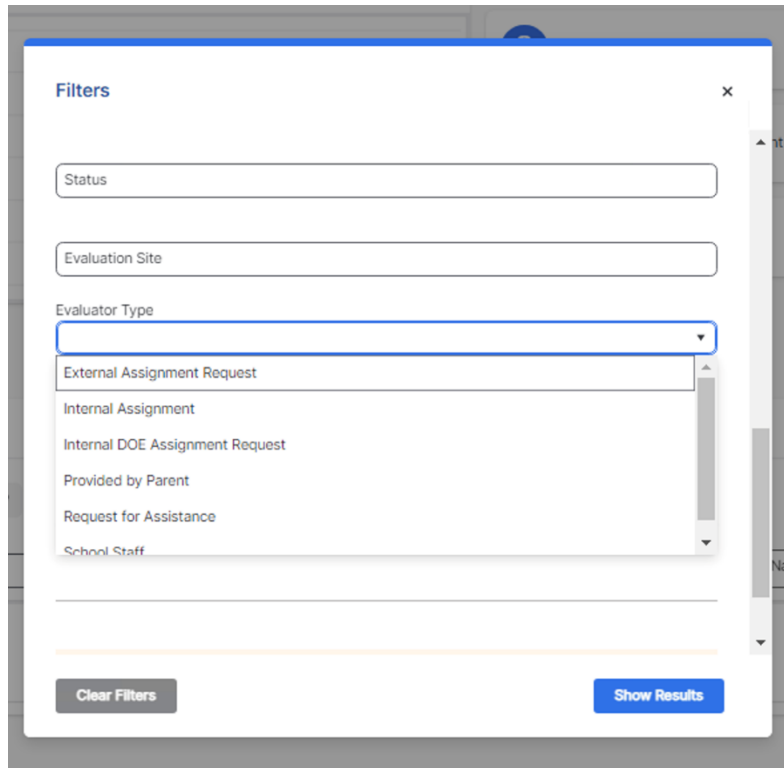
Evaluation Site

Evaluator Type

Placement

Clear Filters

Show Results



**Filters** [X]

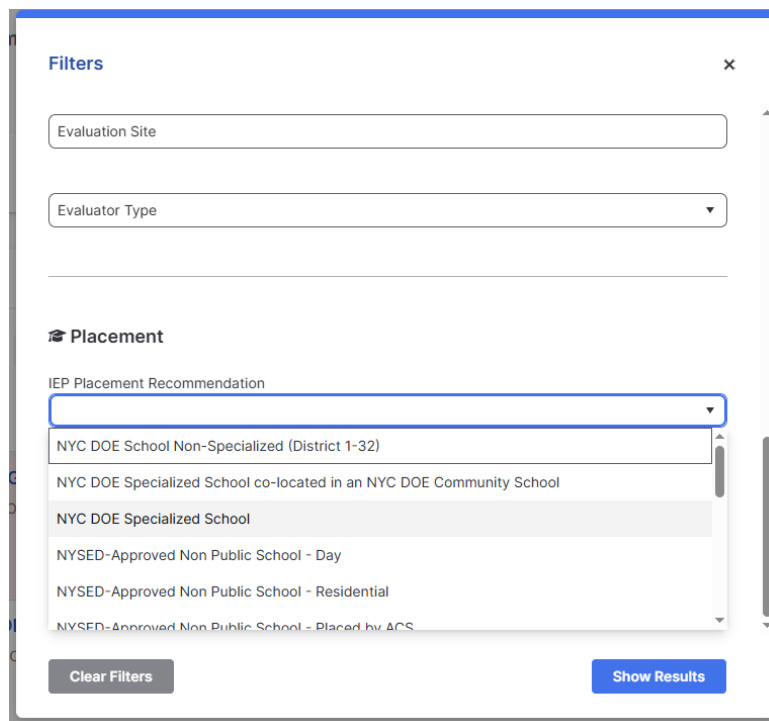
Status

Evaluation Site

Evaluator Type

- External Assignment Request
- Internal Assignment
- Internal DOE Assignment Request
- Provided by Parent
- Request for Assistance
- School Staff

24. You can filter the dashboard by **Placement** recommendation using the **Advanced Filters** pop-up.




**Filters** [X]

Evaluation Site

Evaluator Type

---

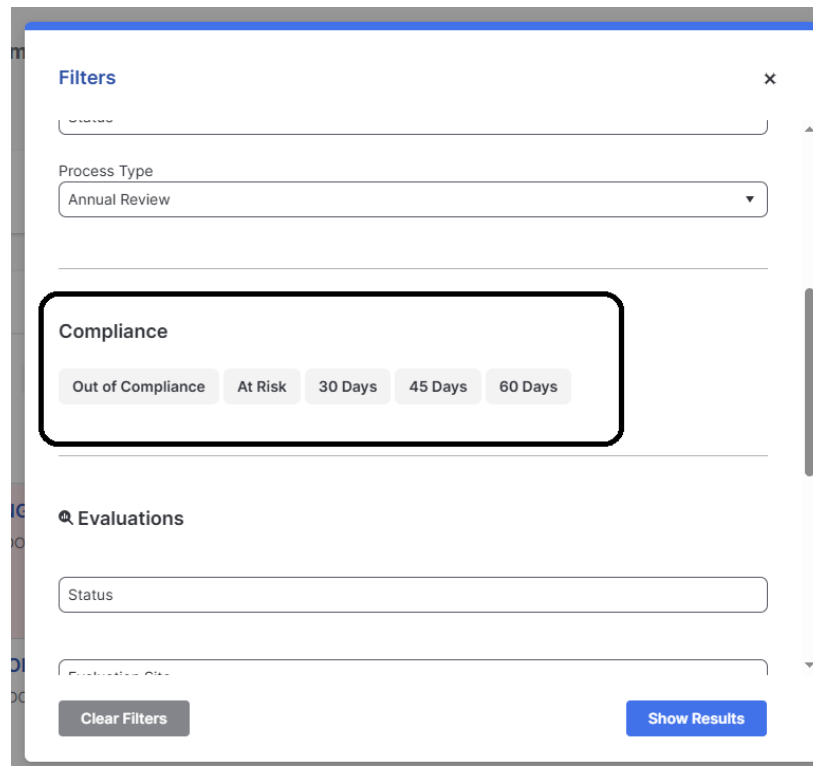
 **Placement**

IEP Placement Recommendation

- NYC DOE School Non-Specialized (District 1-32)
- NYC DOE Specialized School co-located in an NYC DOE Community School
- NYC DOE Specialized School
- NYSED-Approved Non Public School - Day
- NYSED-Approved Non Public School - Residential
- NYSED-Approved Non Public School - Placed by ACS

25. You can also filter the dashboard by *Compliance* status. Choosing one of these indicators will show all students who fit the criteria for that compliance status.

For example, if you choose **Out of Compliance**, all students whose case status is considered Out of Compliance will show on the dashboard.



**Filters**

Process Type  
Annual Review

**Compliance**

Out of Compliance At Risk 30 Days 45 Days 60 Days

**Evaluations**

Status

Clear Filters Show Results

26. To add a referral for a student, click the **+Add Referral** button in the top right corner of the screen. This will open a pop-up to create a new referral. For detailed steps, see reference guide, “1.1 How to Create an Initial Referral”.



**Students**

+ Add Referral Export to Excel

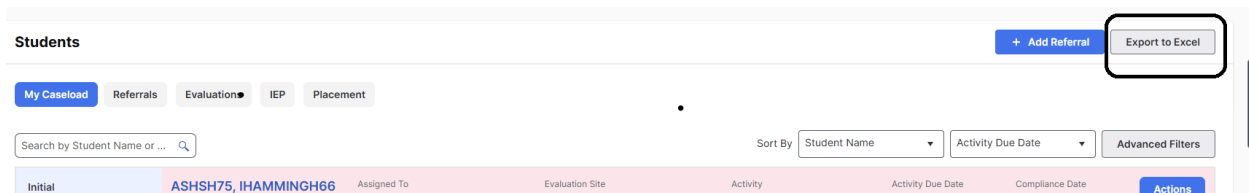
My Caseload Referrals Evaluation IEP Placement

Search by Student Name or ...

Sort By Student Name Activity Due Date Advanced Filters

Initial	ASHSH75, IHAMMINGH66	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions

27. You can export the entire dashboard to Excel by clicking the **Export to Excel** button in the top right corner of the dashboard.



**Students**

+ Add Referral Export to Excel

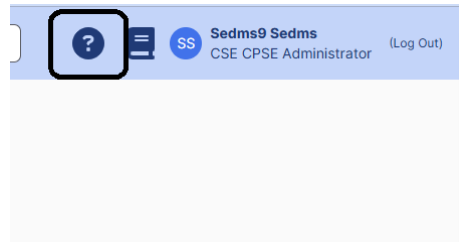
My Caseload Referrals Evaluation IEP Placement

Search by Student Name or ...

Sort By Student Name Activity Due Date Advanced Filters

Initial	ASHSH75, IHAMMINGH66	Assigned To	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions

28. To access DOE help links, click the **?** icon in the top right corner of the screen to the left of your name.



29. This will open a list of NYCPS Resources to help you navigate the special education process. To return to the dashboard, click **My Caseload** in the blue navigation menu on the left.

