

# 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.

**Disclaimer:** 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.

The screenshot shows the ATLAS dashboard for a CSE CPSE Administrator. The interface includes a top navigation bar with the NYC Public Schools logo, a search bar, and user information for Nikkeba Miller. A left sidebar contains navigation options: My Caseload, EI Transition, and Reports. The main content area features a 'Welcome!' message, a 'Students in Compliance' bar chart comparing 30-day and 60-day compliance rates, and 'Quick Links' for various administrative tasks. Below these is a 'Students' table with columns for name, evaluation site, activity, activity due date, and compliance date. Two students are listed: TAORMINA, EVERLY (Unassigned) and TUBERMAN SOLON, EZEKIEL (Unassigned).

Initial	Student Name	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
Initial	TAORMINA, EVERLY (Unassigned) Student ID: 101169918   DOB: 05/16/2020 DBN:   District: District 31		Placement Completed			Actions
Initial	TUBERMAN SOLON, EZEKIEL (Unassigned)	YELED V'YALDA	Pending IEP			Actions

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

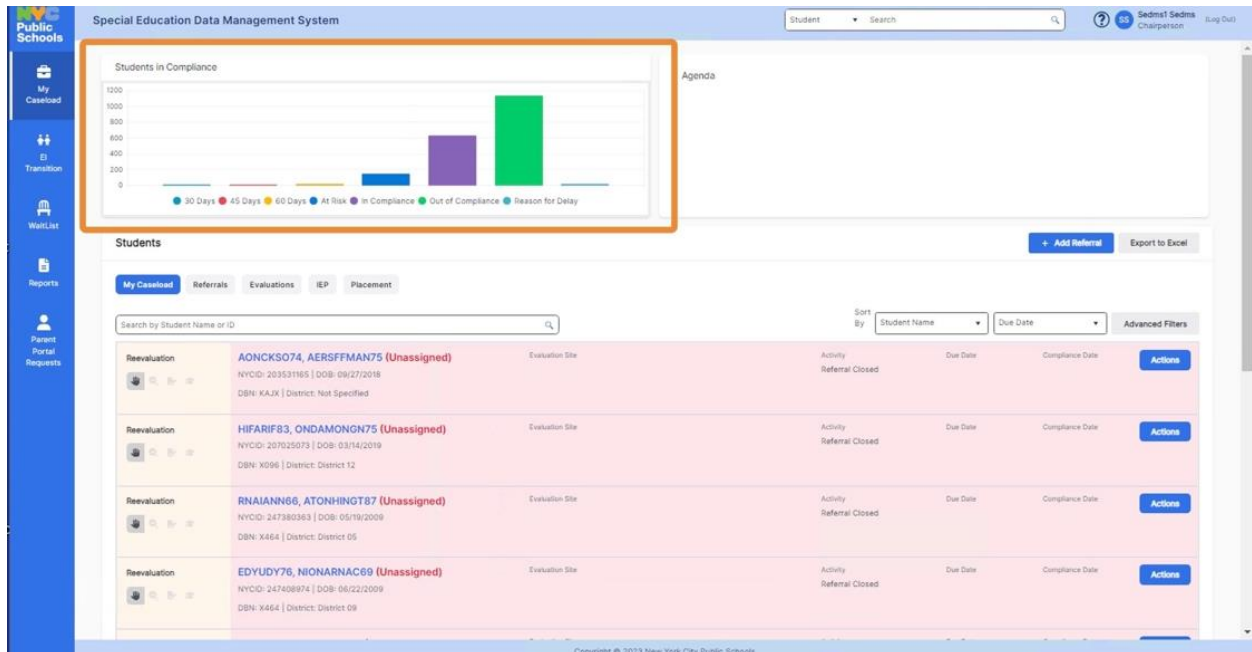
The screenshot shows the dashboard for Nikkeba Miller, CSE CPSE Administrator. In the top right corner, the user's name and title are displayed next to a profile icon and a 'Log Out' link. The dashboard includes a 'Welcome!' message, a 'Students in Compliance' bar chart, and a 'Students' table with columns for Initial, Name, Evaluation Site, Activity, Activity Due Date, and Compliance Date. Two students are listed: TAORMINA, EVERLY (Unassigned) and TUBERMAN SOLON, EZEKIEL (Unassigned).

3. 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.

This screenshot is identical to the previous one but highlights the blue vertical navigation menu on the left side of the dashboard. The menu contains three items: 'My Caseload', 'EI Transition', and 'Reports'. The 'My Caseload' item is highlighted with an orange box, indicating it is the current view.

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

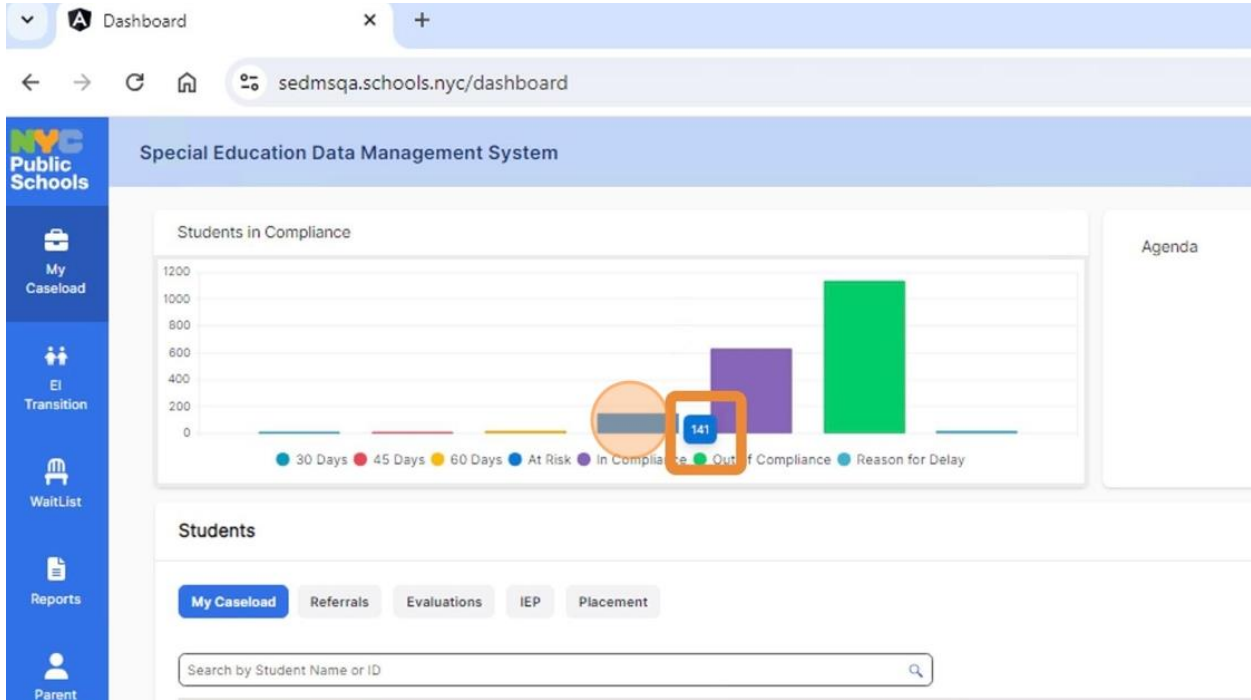
4. The Students in Compliance graph is in the top left corner of the dashboard. This graph gives an overview of the compliance status of all students who are assigned to you.



**Note:** The graph may look different depending on your role.

5. Clicking a bar in the **Students in Compliance** chart will update the dashboard to show all students with the selected compliance status. For example, the user below has selected the **In Compliance** bar.

If you hover over the bar, it will show you the number of students with that compliance status. This data is based off the Compliance Date shown on each student card, which is dynamically updated based on the student's process step.



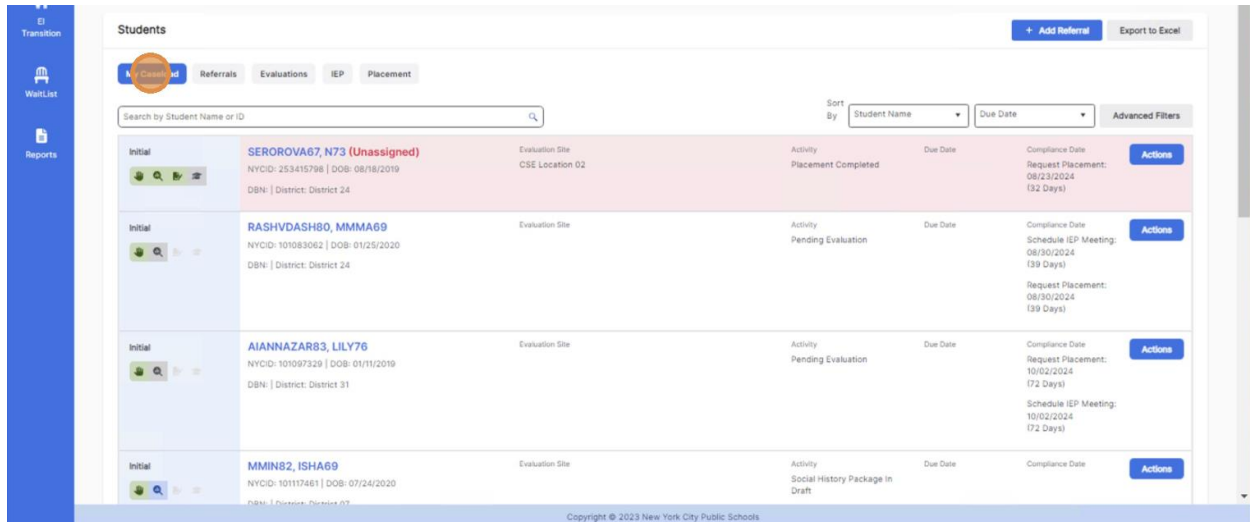
The dashboard shows a detailed table of student records. The table has columns for Initial, Name, Activity, Due Date, and Compliance Date. The "My Caseload" tab is selected. The table contains the following data:

Initial	Name	Activity	Due Date	Compliance Date
Parker, July	NYCID: 230100719   DOB: 01/01/2020 DBN: 88K815   District:	IEP in Draft	Finalize IEP: 08/08/2024 (13 Days Left)	Request Placement: 08/20/2024 (12 Days)
PerfTTTIn, PerfTTTIn	NYCID: 230100809   DOB: 11/23/2020 DBN: 88M803   District:	Pending Evaluation		Schedule IEP Meeting: 08/08/2024 (13 Days) Request Placement: 08/08/2024 (13 Days)
QA, Shilpa Three	NYCID: 230101098   DOB: 12/18/2020 DBN: 88M804   District:	Pending Evaluation	Finalize IEP: 08/08/2024 (13 Days Left)	
QA, ShilpaSumeerone	NYCID: 230101999   DOB: 12/26/2020	Referral: Pending PWN	Send Initial PWN: 07/31/2024	PWN/Notice of Referral: 08/02/2024

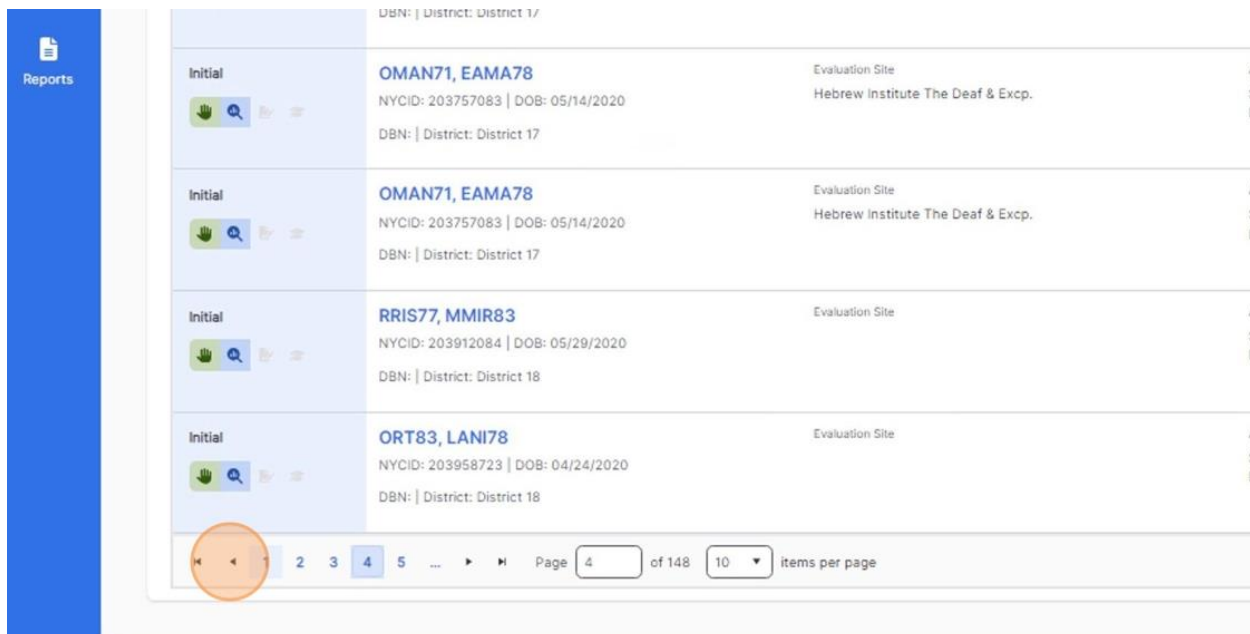
6. The **My Caseload** button is selected by default when you arrive at your dashboard and will be shown in blue. It means that you're seeing only students assigned to you, regardless of where they are in the process.

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 citywide

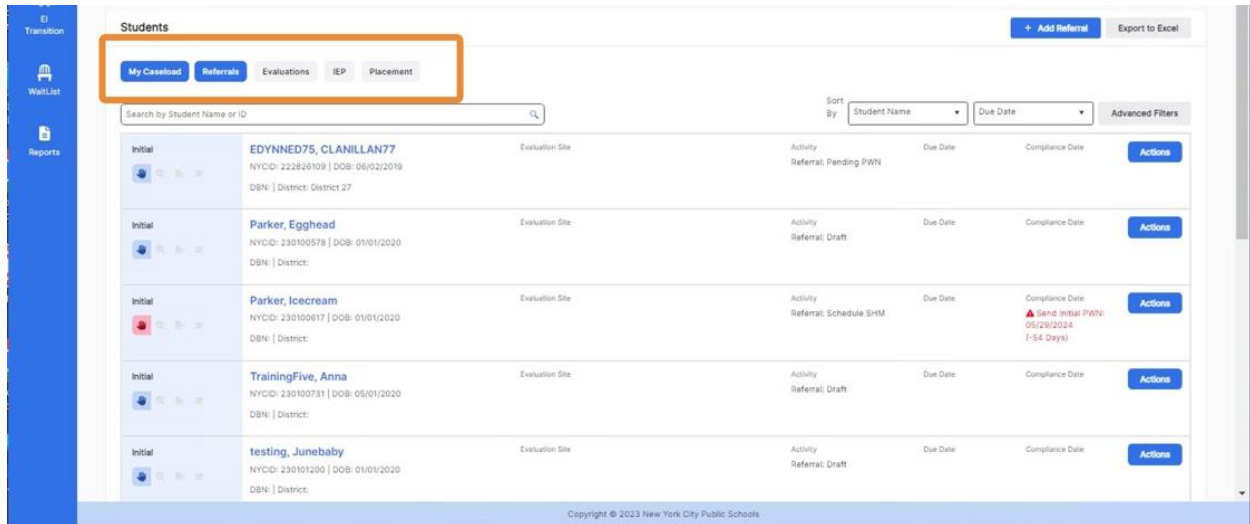


7. To navigate through the pages, use the page numbers or the left/right arrow icons at the bottom of the dashboard.



8. 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.



9. 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 person wearing a graduation cap

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

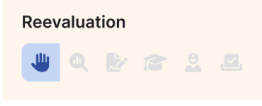
**1 Color Legend**

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

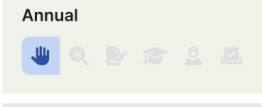
**Initial**



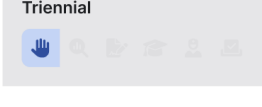
**Reevaluation**



**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

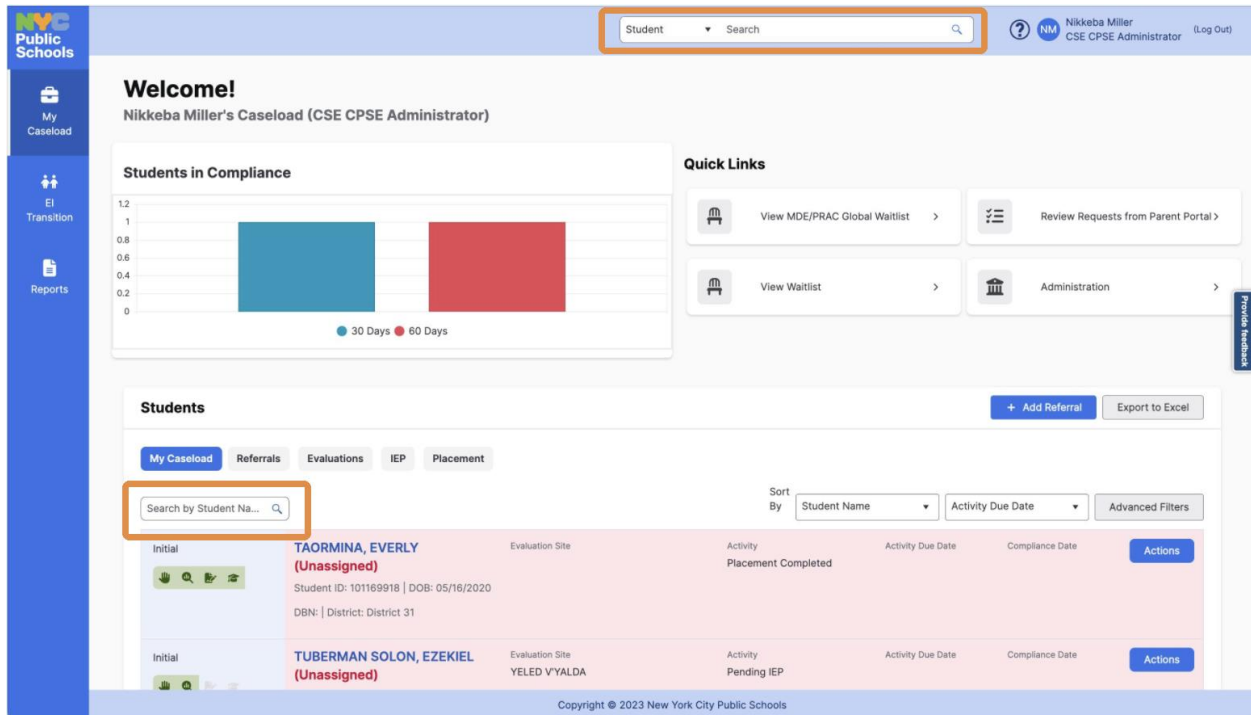
For example: All students on this page have the first process stage icon (a hand). This means that each of these students is in the Referrals stage.

Students							+ Add Referral	Export to Excel
<span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">My Caseload</span> <span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 5px;">Referrals</span> <span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 5px;">Evaluations</span> <span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 5px;">IEP</span> <span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 5px;">Placement</span>								
<input type="text" value="Search by Student Name or ID"/>							Sort By: <span style="border: 1px solid #ccc; padding: 2px;">Student Name</span>   <span style="border: 1px solid #ccc; padding: 2px;">Due Date</span>   <span style="border: 1px solid #ccc; padding: 2px;">Advanced Filters</span>	
		<b>EDYNNED75, CLANILLAN77</b> NYCID: 222826109   DOB: 06/02/2019 DBN:   District: District 27	Evaluation Site	Activity Referral: Pending PWN	Due Date	Compliance Date	<a href="#">Actions</a>	
		<b>Parker, Egghead</b> NYCID: 230100576   DOB: 01/01/2020 DBN:   District:	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	<a href="#">Actions</a>	
		<b>Parker, Icecream</b> NYCID: 230100617   DOB: 01/01/2020 DBN:   District:	Evaluation Site	Activity Referral: Schedule SHM	Due Date	Compliance Date <span style="color: red; font-weight: bold;">▲ Send Initial PWN: 05/29/2024 (1-54 Days)</span>	<a href="#">Actions</a>	
		<b>TrainingFive, Anna</b> NYCID: 230100731   DOB: 05/01/2020 DBN:   District:	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	<a href="#">Actions</a>	
		<b>testing, Junebaby</b> NYCID: 230101200   DOB: 01/01/2020 DBN:   District:	Evaluation Site	Activity Referral: Draft	Due Date	Compliance Date	<a href="#">Actions</a>	

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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.





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.

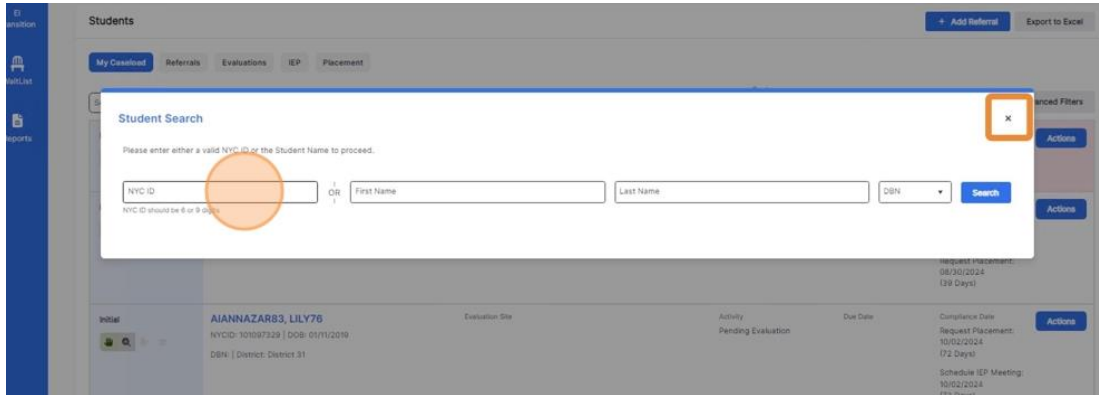
For example, since ATLAS currently only includes preschool aged students, a search using the top right search bar might return records for school aged students who are not in ATLAS. Using the top right search bar, a user can search by student ID, or a combination of first name, last name, and DBN.

The search box below **My Caseload** allows a user to search all of 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 of the students in their school or district. Users may search by first name, last name, or student ID.

For more information on how to search for a student, please review the reference guide, "7.4 How to Search for a Student".

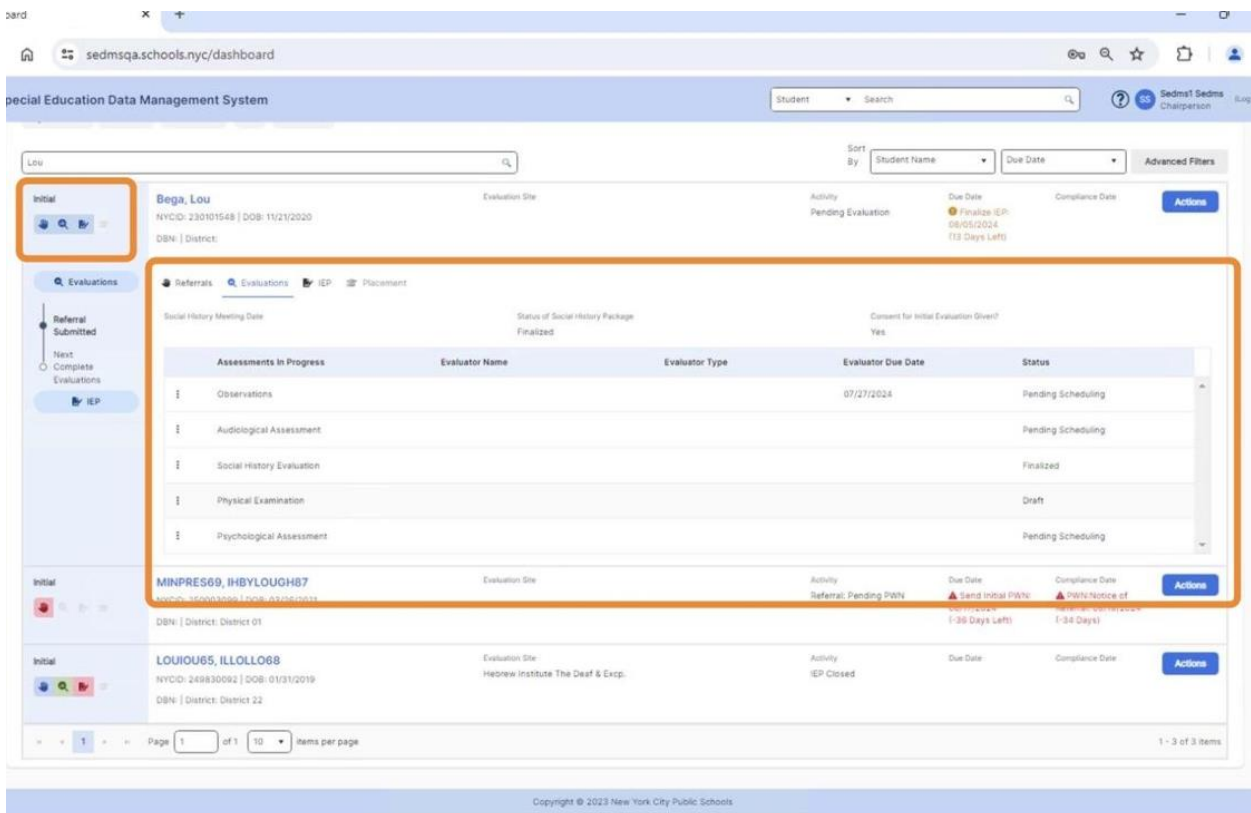
To close the pop-up, click the x in the top right corner.





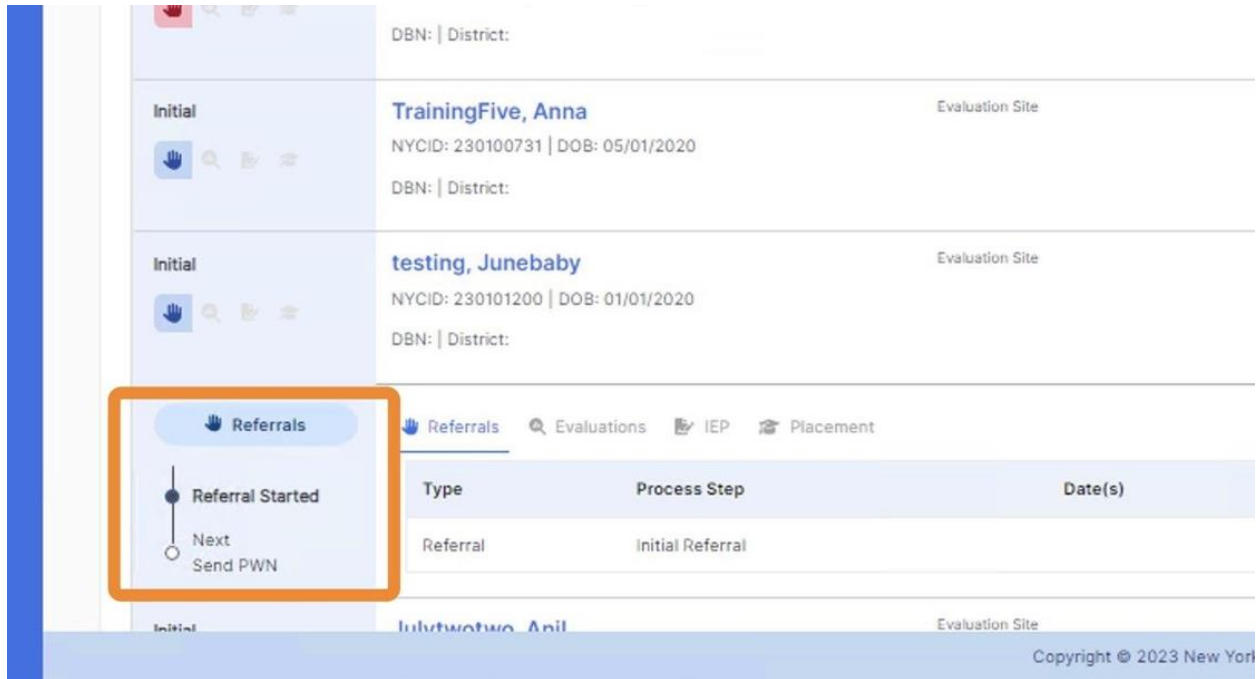
12. Click anywhere on a student’s row to expand it and show more details about their current process stage. For the student below, you can see that they are currently having evaluations completed, and the assessment planning grid shows the various states of evaluations.

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

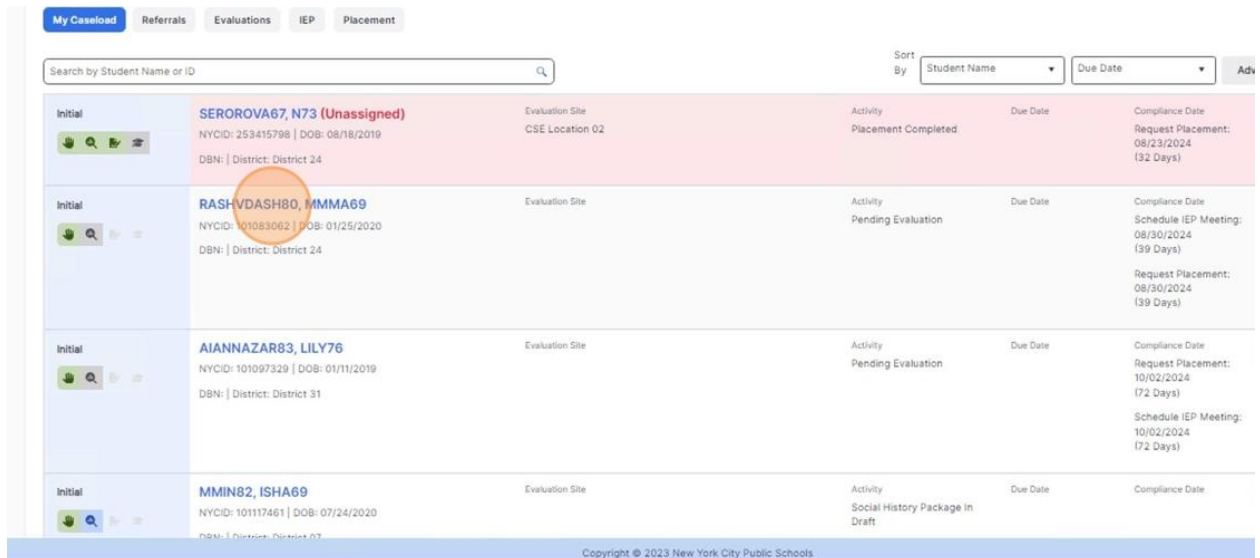


13. When the student's panel is expanded, you’ll see the next step in the process as indicated in the blue box on the side.

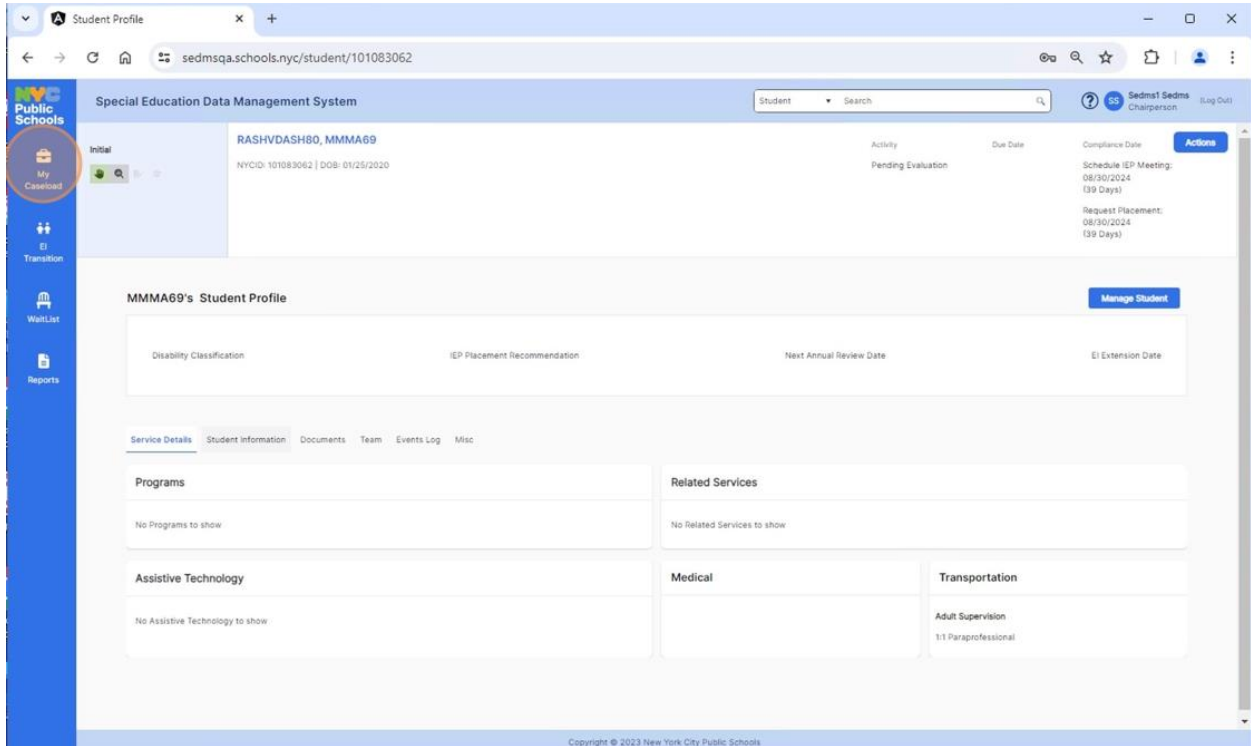
For example, if the next step is to send the “PWN Notice of Referral: Initial”, it will show as *Next: Send PWN* under the current step.



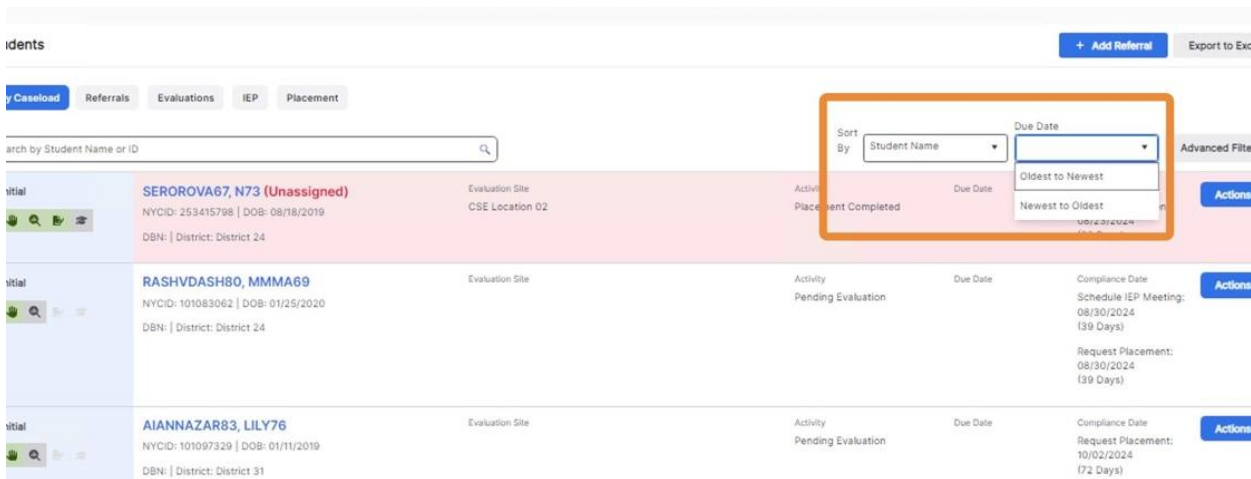
14. To view a student’s profile, click on their name in blue.



15. 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.



16. 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).



17. 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.

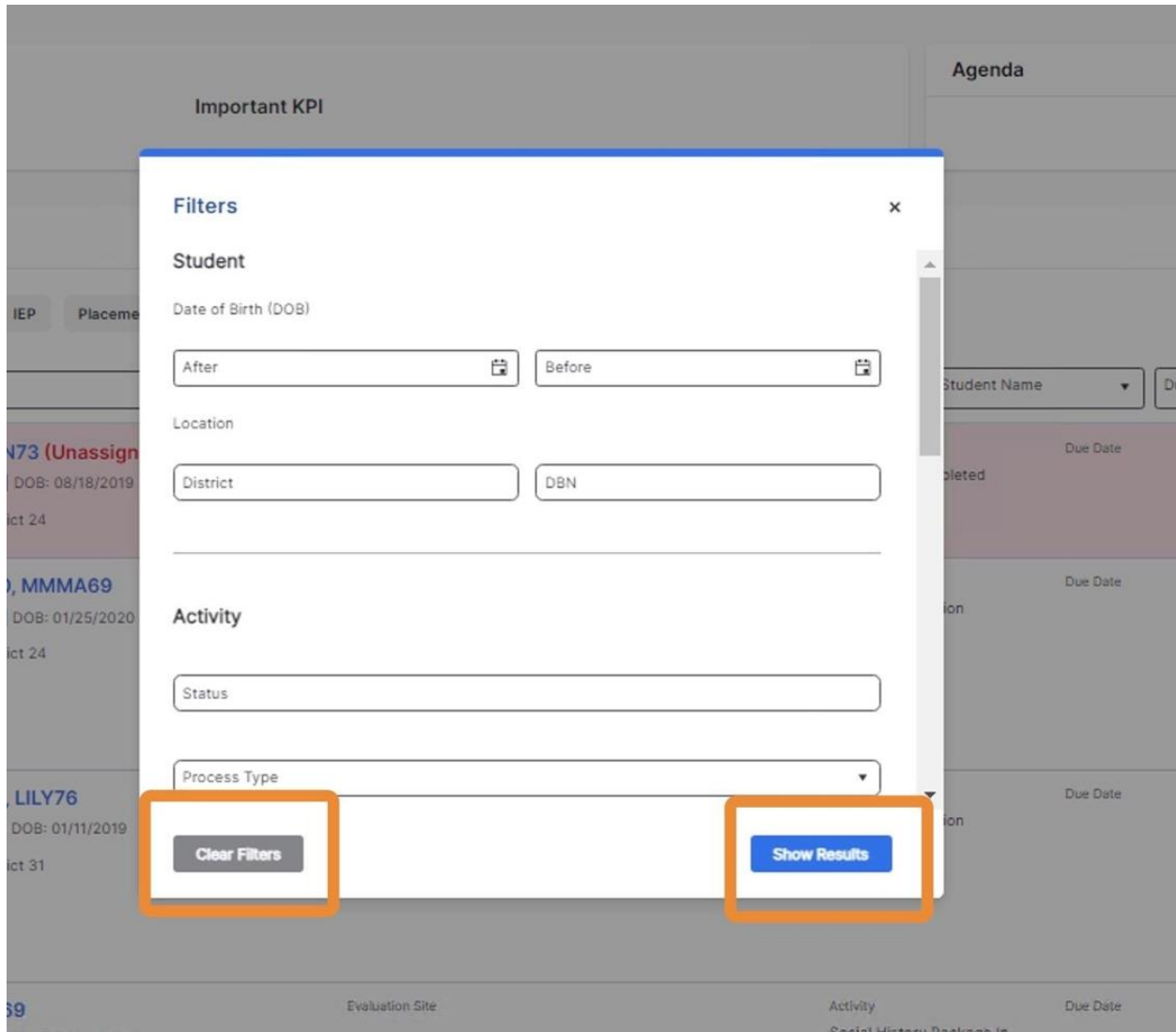
+ Add Referral
Export to Excel

Sort By Student Name ▼ Due Date ▼
Advanced Filters

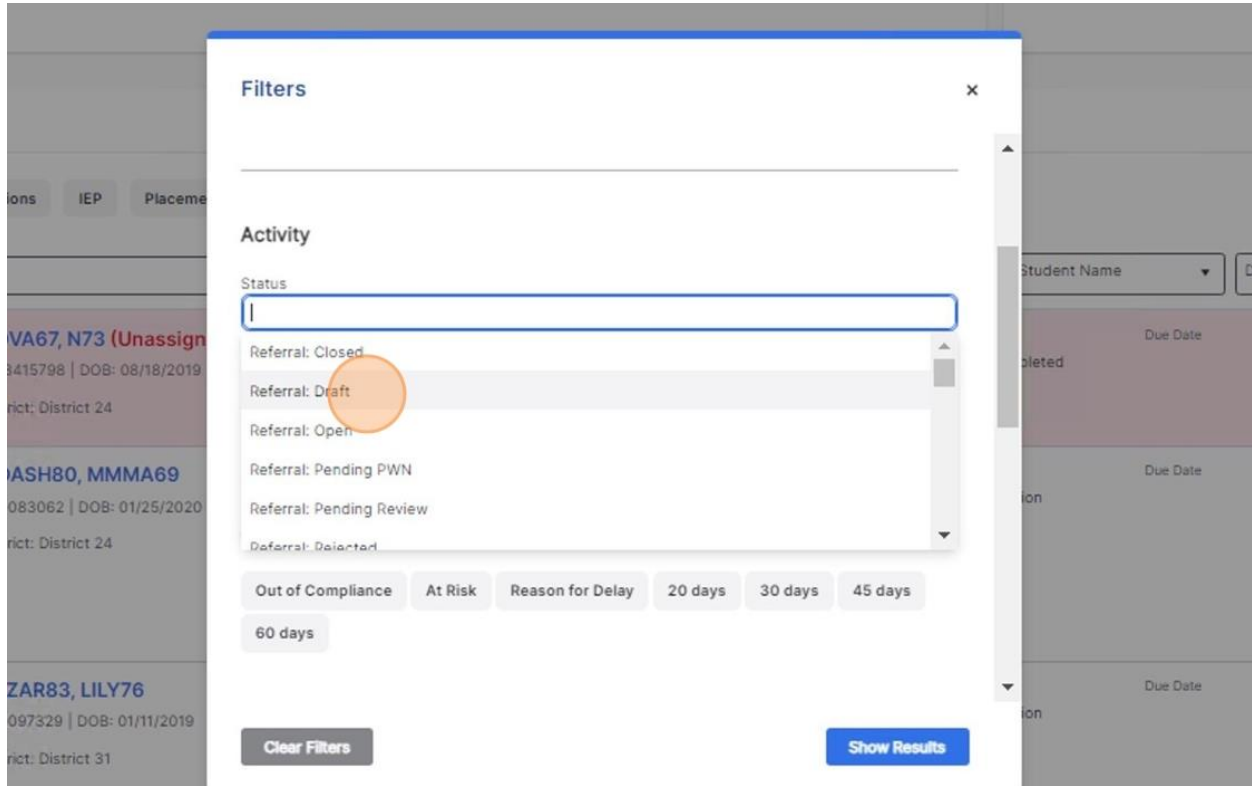
Evaluation Site	Activity	Due Date	Compliance Date	Actions
CSE Location 02	Placement Completed		Request Placement: 08/23/2024 (32 Days)	<span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 3px;">Actions</span>
Evaluation Site	Pending Evaluation		Schedule IEP Meeting: 08/30/2024 (39 Days)  Request Placement: 08/30/2024 (39 Days)	<span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 3px;">Actions</span>
Evaluation Site	Pending Evaluation		Request Placement: 10/02/2024 (72 Days)  Schedule IEP Meeting:	<span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 3px;">Actions</span>

18. 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.

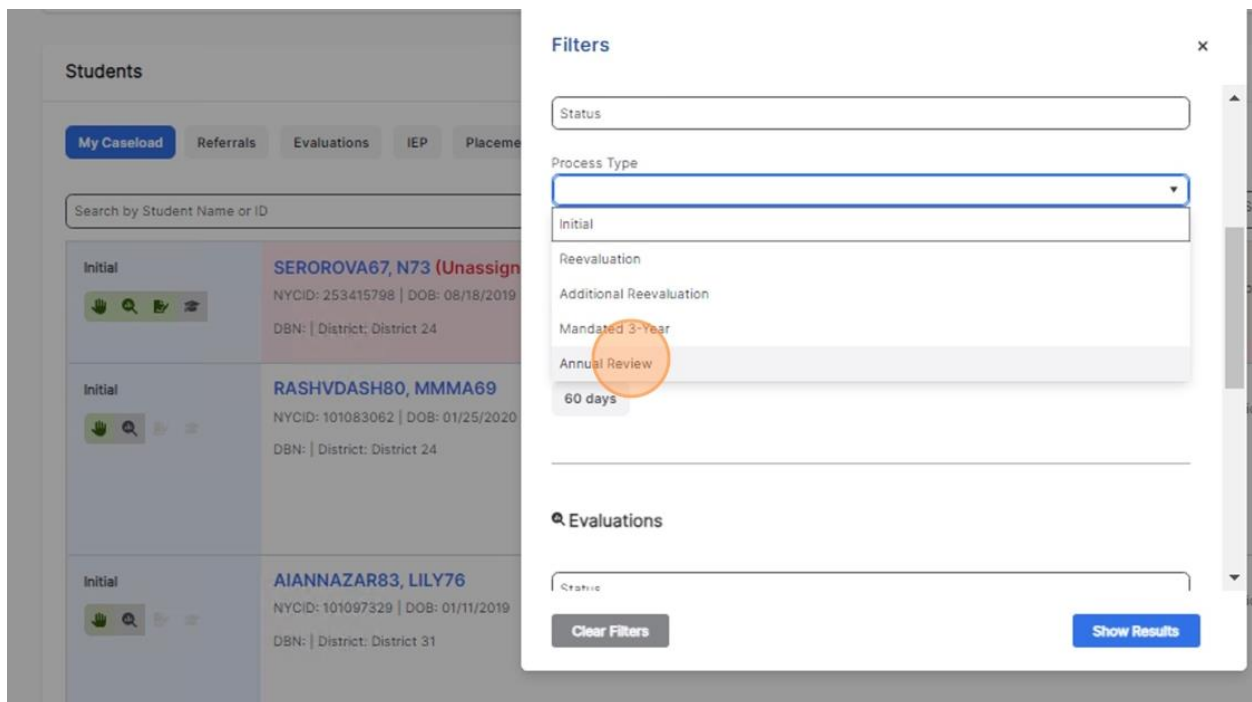


19. In the Filters pop-up you can also search by **Activity Status**. This allows you to filter by specific process stages, such as pending actions.



20. 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.



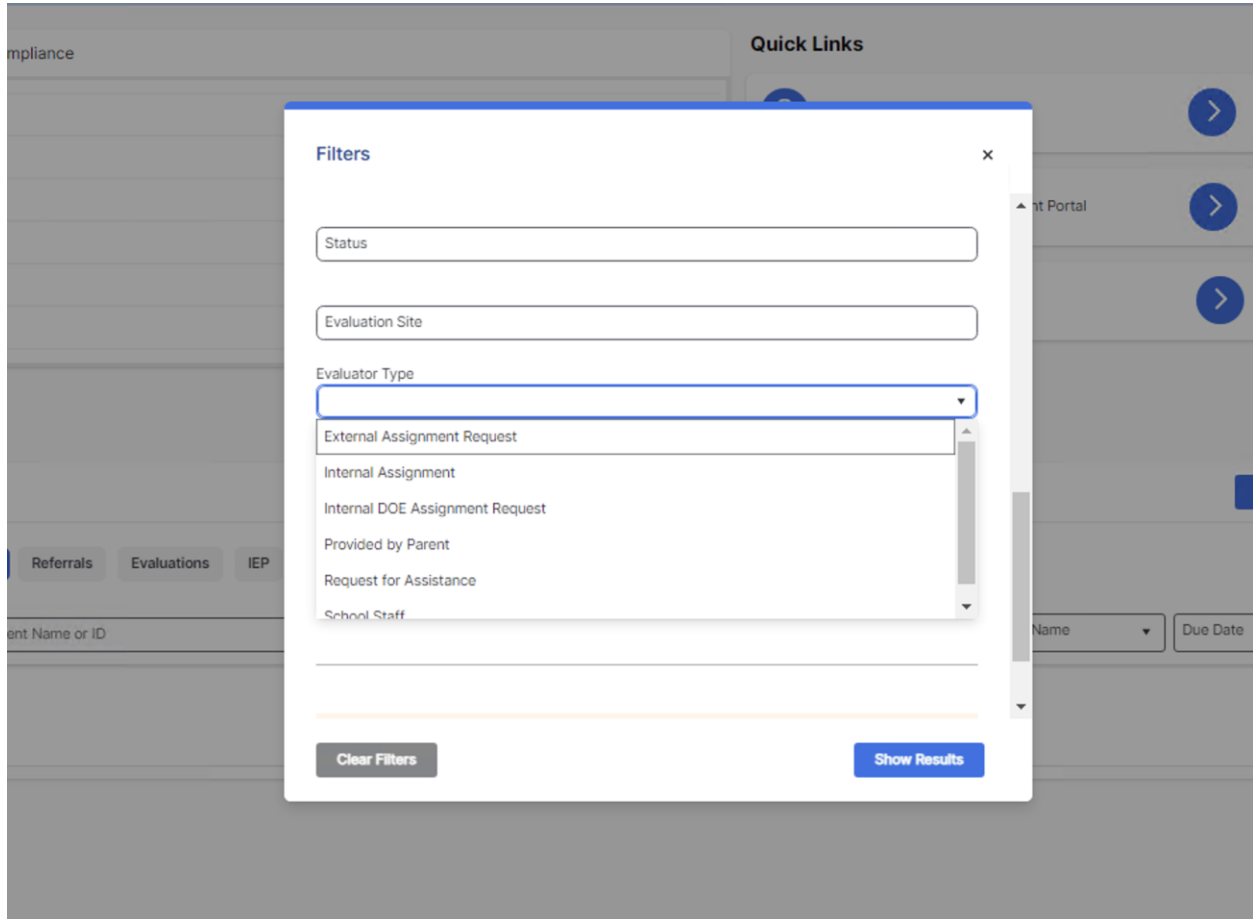
21. You can also sort the dashboard by *Evaluation Status*, *Evaluation Site*, or *Evaluator Type*.

The image shows a 'Filters' modal window overlaid on a dashboard. The modal is titled 'Filters' and has a close button (X) in the top right corner. It contains the following elements:

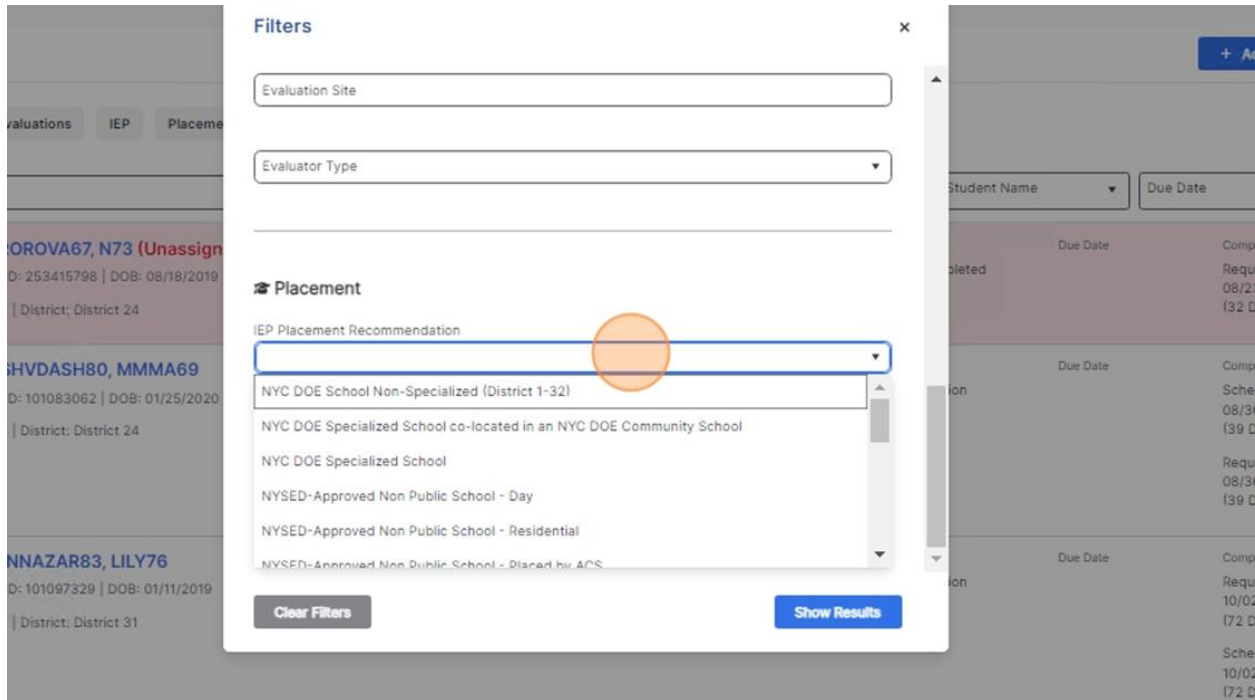
- A '60 days' filter tag at the top.
- A search icon followed by the text 'Evaluations'.
- Three input fields: 'Status', 'Evaluation Site', and 'Evaluator Type' (which is a dropdown menu).
- A search icon followed by the text 'Placement'.
- A 'Clear Filters' button at the bottom left of the modal.
- A 'Show Results' button at the bottom right of the modal.

The background dashboard shows a list of student records. Visible student names include 'PROVA67, N73 (Unassign)', 'IVDASH80, MMA69', and 'NAZAR83, LILY76'. The table columns include 'Student Name', 'Due Date', and 'Compliance'.



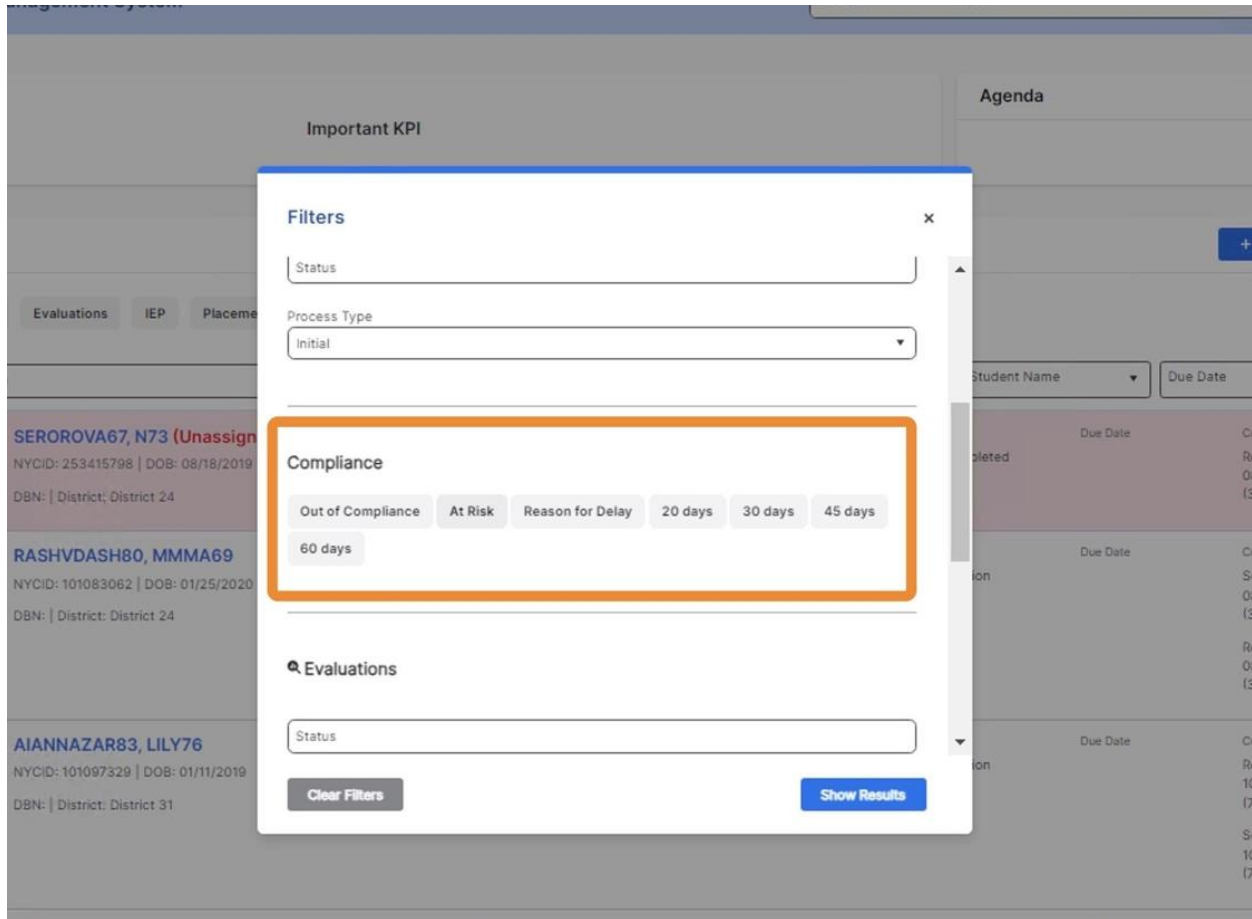


22. You can filter the dashboard by Placement recommendation using the **Advanced Filters** pop-up.

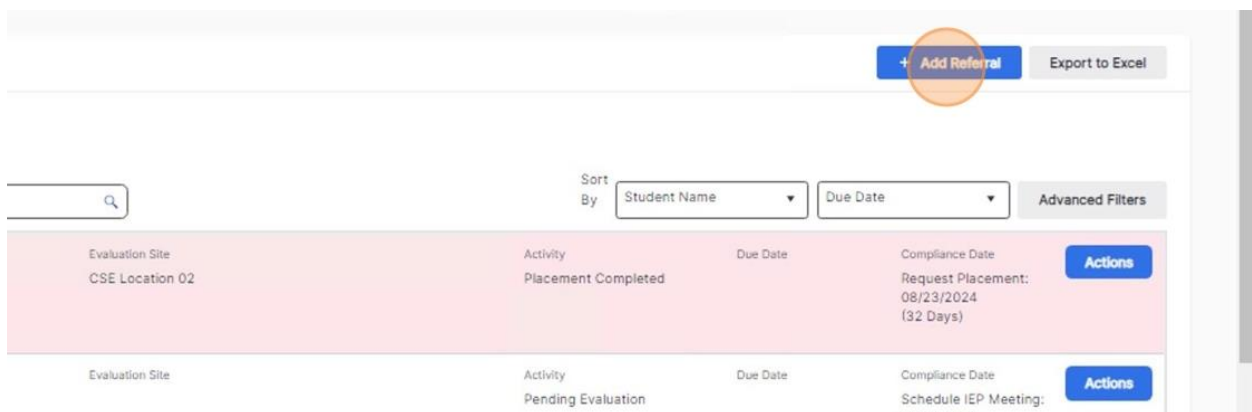


23. You can also filter the dashboard by *Compliance* status. Choosing one of these indicators will show all students who fit the criteria for that compliance status.

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



24. 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”.




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

[+ Add Referral](#)
[Export to Excel](#)


Sort By: Student Name Due Date Advanced Filters

Evaluation Site	Activity	Due Date	Compliance Date	Actions
CSE Location 02	Placement Completed		Request Placement: 08/23/2024 (32 Days)	<a href="#">Actions</a>
Evaluation Site	Pending Evaluation		Schedule IEP Meeting: 08/30/2024 (39 Days)  Request Placement: 08/30/2024 (39 Days)	<a href="#">Actions</a>
Evaluation Site	Pending Evaluation		Request Placement: 10/02/2024 (72 Days)	<a href="#">Actions</a>


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


NM Nikkeba Miller  
CSE CPSE Administrator (Log Out)

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[/PRAC Global Waitlist >](#)
 [Review Requests from Parent Portal >](#)

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ist >
 [Administration >](#)

27. 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.

Public Schools

My Caseload

EI Transition

Reports

Student Search

Daniel Szukin  
CSE CPSE Administrator Log Out

### NYCPS Resources

- [Procedural Safeguards Notice](#)
- [Special Education Standard Operating Procedures Manual \(SOPM\)](#)
- [Encounter Attendance Help Guide](#)
- [Translated Parent Notifications](#)
- [Chancellor's Regulations](#)
- [NYSED Laws and Regulations Related to Special Education](#)
- [Medical Accommodation Packet Forms](#)
- [NYCDOE Testing Accommodations Guide](#)
- [NYCDOE Alternate Assessment \(including NYSAA\) FAQs](#)
- [CORe and Variance Requests](#)
- [NYSED Approved Non-Public Schools](#)