

How to View Students Assigned to My Caseload

This guide provides a step-by-step process on how to view students assigned to you. By following these instructions, you will be able to easily and efficiently view your entire student caseload, ensuring that all students are properly assigned to you for accurate tracking and support.

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. When you log in to ATLAS, your dashboard will show the students currently assigned to your caseload. The **My Caseload** button will show all students assigned to you based on your role in their Special Education administration.

Central roles such as a CPSE Administrator or Chairperson will utilize the Assign functionality from the dashboard to assign students, which will subsequently be reflected in the My Caseload view. CPSE Administrators and Chairpersons can also self-assign or assign students to others.

MDE's will not use this function, they utilize Assessment Planning to assign assessments, and their My Caseload will display students for whom they have an assessment assigned. MDE Supervisors will have a comprehensive view of all students assigned to their agency through the MDE Selection functionality.

Welcome!
Sedms1 Sedms's Caseload ()

Students Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student N...

Sort By Advanced Filters

Initial	Student Name	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	perfStgmUcUUNISStudentLn, perfStgmUcUUNISStudentFn (Unassigned)		Referral: Pending PWN			

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2. If you deselect **My Caseload**, it will turn gray, this will show you all students you have access to, not just those on your caseload.

- School-based users will see all students for their school’s DBN
- CSE/CPSE will see all students citywide

Assigned student records are displayed in white rows. Depending on your access level, these may be assigned to you, or you may be able to view student records that are assigned to other users. Unassigned records appear in pink rows. Refer to the reference guide, “7.3 How to Assign Students to A Caseload” for further instructions.

Welcome!
Sedms1 Sedms's Caseload ()

Students Export to Excel

My Caseload Referrals Evaluations IEP Placement

Search by Student N...

Sort By: Student Name Activity Due Date Advanced Filters

Initial	Student Name	Evaluation Site	Activity	Activity Due Date	Compliance Date	Actions
	perfstgmUcUUNISStudentLn, perfstgmUcUUNISStudentFn (Unassigned) Student ID: 242341971 DOB: 10/10/2021 DBN: 88M801 District: District 02		Referral: Pending PWN			Actions
	Test Child Sep, Test Child Sep Student ID: 242334451 DOB: 09/09/2020 DBN: 88M801 District: District 13	YELED V'YALDA	Social History Package In Draft		Schedule IEP Meeting: 12/02/2024 (37 Days) Request Placement: 12/02/2024 (37 Days)	Actions
	perfstgIvVVOStudentLn, perfstgIvVVOStudentFn Student ID: 242340712 DOB: 10/10/2021 DBN: 88M801 District: District 02		Social History Package In Draft			Actions

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3. To view additional students, scroll to the bottom and click through the pages. You can manually enter a page number or use the arrows to navigate. Change the number of items per page using the drop-down menu on the right.

Reports

	perfstgIvVVOStudentLn, perfstgIvVVOStudentFn Student ID: 242340712 DOB: 10/10/2021 DBN: 88M801 District: District 02	YELED V'YALDA	Placement Completed
	perfstgkVbVVSDStudentLn, perfstgkVbVVSDStudentFn Student ID: 242340713 DOB: 10/10/2021 DBN: 88M801 District: District 02	YELED V'YALDA	Placement Completed

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