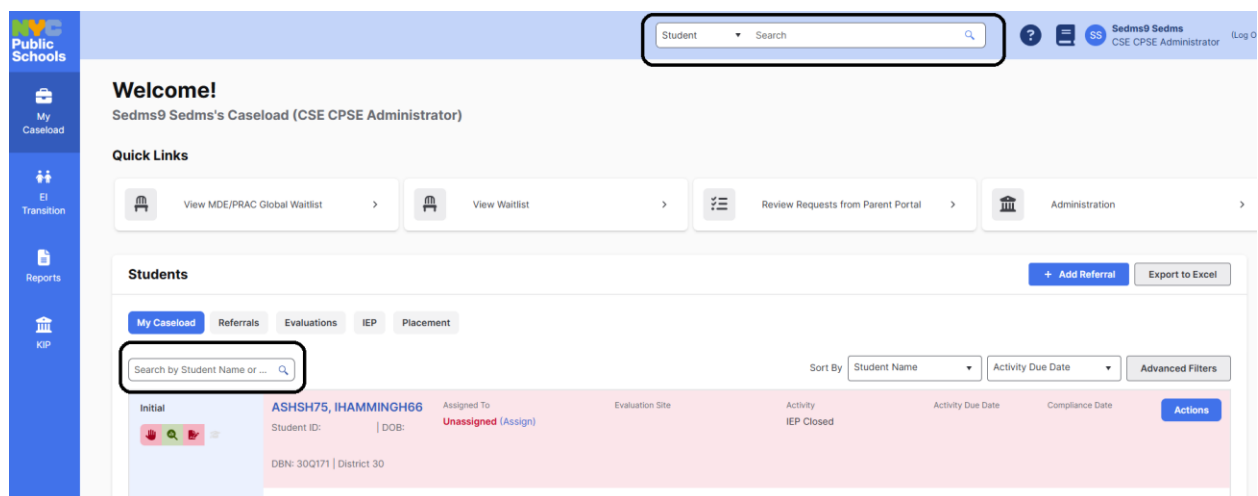


# How to Search for a Student

This guide describes how to search for a student using the search function in the dashboard. It explains how to input the student's first name, last name, or student ID, and then select the desired student from the search results.

**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.

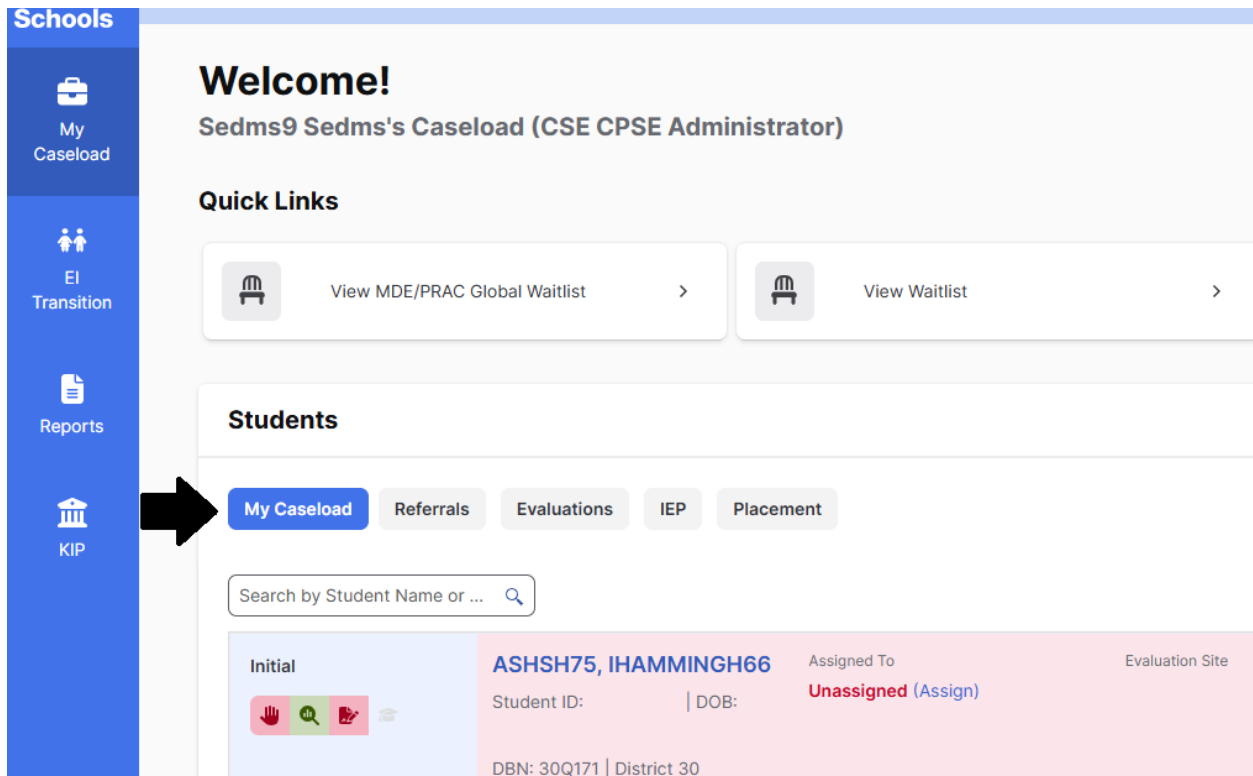
- Depending on your user type, you will see either one or two ways to search for a student in ATLAS.
  - All users will see the search box on **My Caseload**, which allows a user to search all of the students who are viewable to them in ATLAS. For some users this will be just the students on their caseload. 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. Instructions are detailed in step 2.
  - Some users, including CPSE admins, have an additional search functionality that allows them to search ATS for students. The search box in the blue banner at the top right corner 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. Instructions are detailed in step 4.



The screenshot shows the ATLAS dashboard for a user named Sedms9 Sedms, who is a CSE CPSE Administrator. The dashboard includes a sidebar with navigation links for My Caseload, EI Transition, Reports, and KIP. The main content area displays a 'Welcome!' message and a 'Quick Links' section with buttons for View MDE/PRAC Global Waitlist, View Waitlist, Review Requests from Parent Portal, and Administration. Below this is the 'Students' section, which has tabs for My Caseload, Referrals, Evaluations, IEP, and Placement. A search box is highlighted with a red rectangle, showing the text 'Search by Student Name or ...'. The search results table lists student information, including Student ID (ASHSH75, IHAMMINGH66), DOB, Assigned To (Unassigned), Evaluation Site, Activity (IEP Closed), Activity Due Date, Compliance Date, and an Actions button. The top right of the dashboard features a search bar with a dropdown menu set to 'Student' and a search icon.

2. To use the search box below **My Caseload**:



- First, select or deselect **My Caseload** (blue = selected, grey = deselected). If you're searching for a student not assigned to your caseload, deselect **My Caseload**.



**Schools**


**Welcome!**  
Sedms9 Sedms's Caseload (CSE CPSE Administrator)

**Quick Links**





 View MDE/PRAC Global Waitlist >  View Waitlist >

**Students**

**My Caseload** Referrals Evaluations IEP Placement

Search by Student Name or ... 

**Initial**

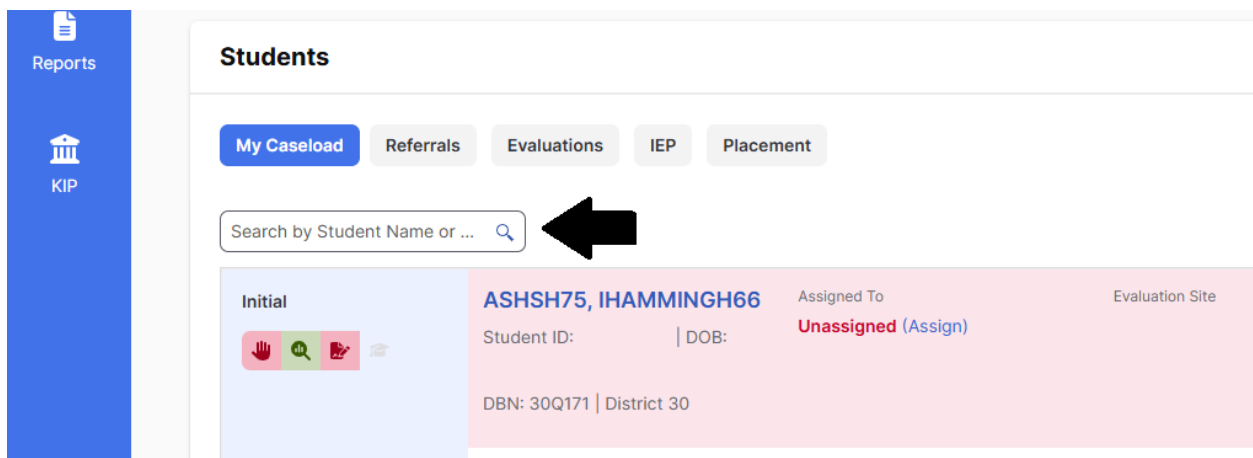
   

**ASHSH75, IHAMMINGH66** Assigned To **Unassigned (Assign)** Evaluation Site

Student ID: | DOB:

DBN: 30Q171 | District 30


3. Type the student's first name, last name, or student ID, and click **Enter**.







**Reports**

**Students**

**My Caseload** Referrals Evaluations IEP Placement

Search by Student Name or ... 

**Initial**

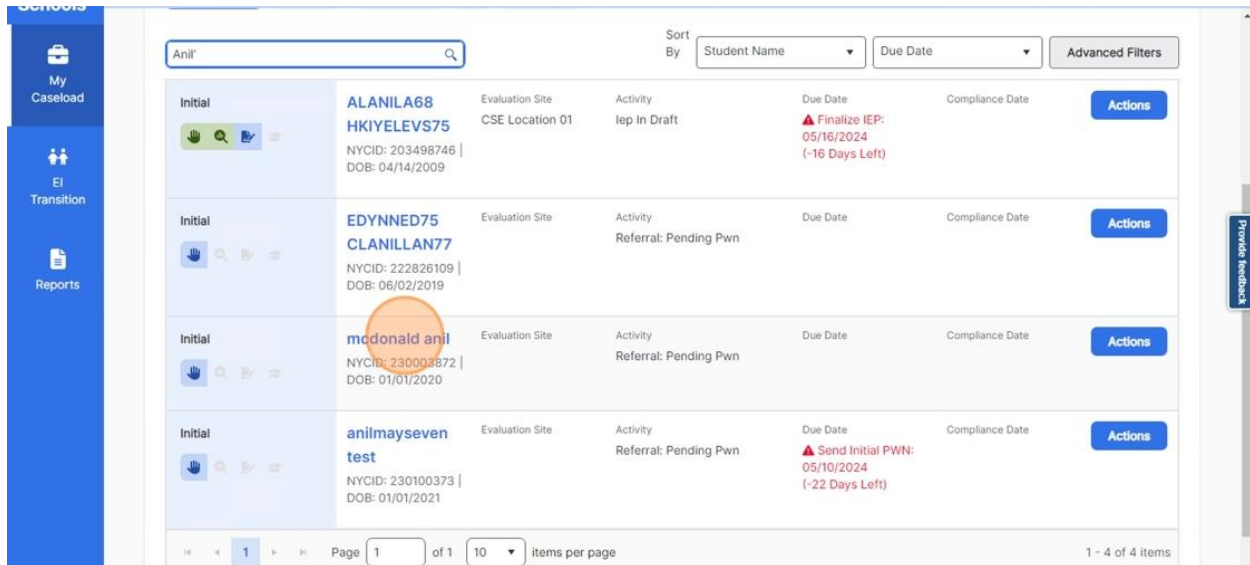
   

**ASHSH75, IHAMMINGH66** Assigned To **Unassigned (Assign)** Evaluation Site

Student ID: | DOB:

DBN: 30Q171 | District 30

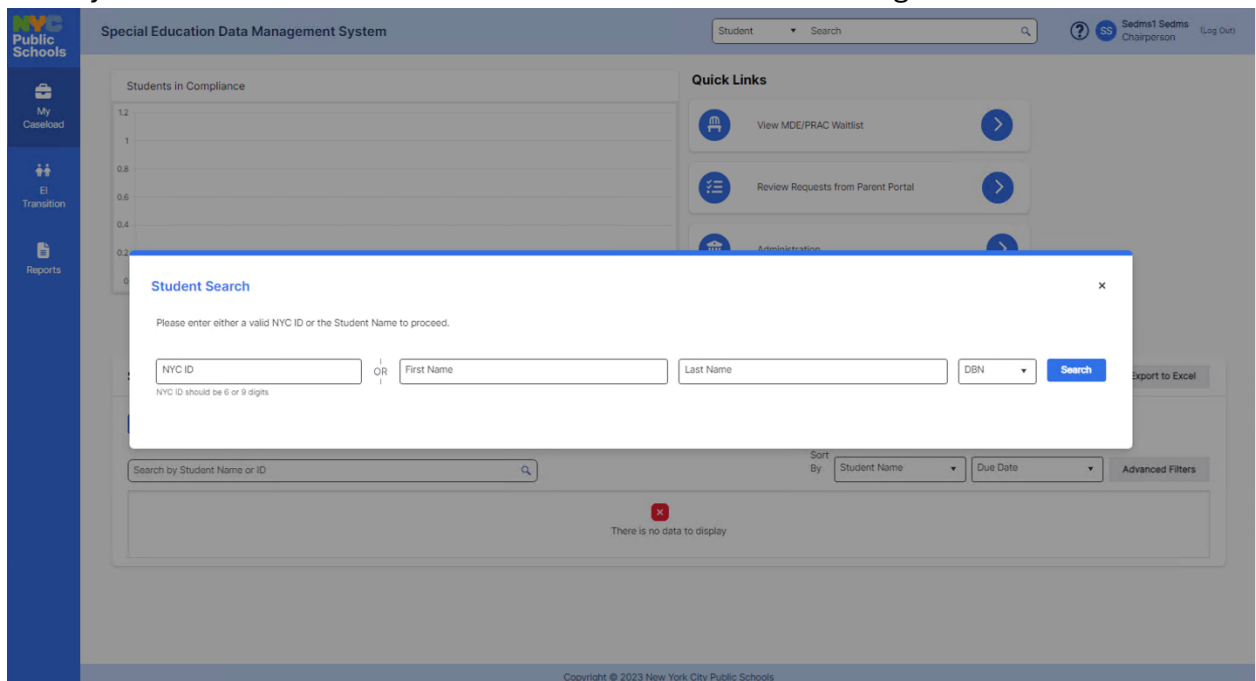
- In this example, the user is searching for a student whose name is Anil. Four students were returned whose names include "Anil". Click on the desired student's name to open their student profile.



| Initial | Student Name  | Evaluation Site | Activity              | Due Date  | Compliance Date | Actions                 |
|---------|---|-----------------|-----------------------|---|-----------------|-------------------------|
|         | <b>ALANILA68</b><br><b>HKIYELEVS75</b><br>NYCID: 203498746  <br>DOB: 04/14/2009 | CSE Location 01 | Iep In Draft          | <b>Finalize IEP:</b><br>05/16/2024<br>(~16 Days Left)     |                 | <a href="#">Actions</a> |
|         | <b>EDYNNED75</b><br><b>CLANILLAN77</b><br>NYCID: 222826109  <br>DOB: 06/02/2019 |                 | Referral: Pending Pwn |   |                 | <a href="#">Actions</a> |
|         | <b>mcdonald anil</b><br>NYCID: 230003872  <br>DOB: 01/01/2020                   |                 | Referral: Pending Pwn |   |                 | <a href="#">Actions</a> |
|         | <b>anilmayseven</b><br><b>test</b><br>NYCID: 230100373  <br>DOB: 01/01/2021     |                 | Referral: Pending Pwn | <b>Send Initial PWN:</b><br>05/10/2024<br>(~22 Days Left) |                 | <a href="#">Actions</a> |

Page 1 of 1 | 10 items per page | 1 - 4 of 4 items

- The search box at the top of the page allows users to search either by student ID, or first name, last name, and DBN associated with the student. If you do not search by student ID you must enter the student's first name, last name, and DBN. Enter the fields you wish to search for and click **Search** to see the matching results.



**Student Search**

Please enter either a valid NYC ID or the Student Name to proceed.

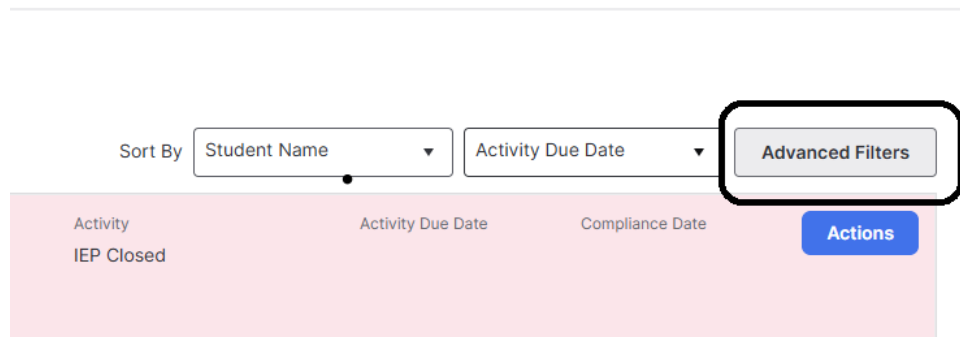
OR

NYC ID should be 6 or 9 digits

There is no data to display

**Tip:** Searching by student ID is recommended to avoid confusion with students who have the same name.

- Use the **Advanced Filters** feature, at the top right of the dashboard, to refine your search by specific criteria like date of birth or location. After selecting filters, click **Show Results** to apply them. To clear all filters, click **Clear Filter**.



The screenshot shows a dashboard interface. At the top, there is a 'Sort By' section with two dropdown menus: 'Student Name' and 'Activity Due Date'. To the right of these is a button labeled 'Advanced Filters', which is highlighted with a red rectangular box. Below this section is a table with a pink background. The table has three columns: 'Activity', 'Activity Due Date', and 'Compliance Date'. The first row of the table contains the text 'IEP Closed'. To the right of the table is a blue button labeled 'Actions'.

- Within the **Filters** pop-up, search by *Activity Status* for more detailed results. A pop-up titled *Filters* will appear. This provides a variety of advanced filters including student date of birth and location.
- After an advanced filter is selected, click **Show Results** in the bottom right corner of the pop-up to apply the filters you have selected to the dashboard or click **Clear Filter** in the bottom left corner of the pop up to clear all previously applied dashboard filters.

The screenshot shows a 'Filters' pop-up window with a close button (X) in the top right corner. It is divided into two main sections: 'Student' and 'Activity'.

**Student Section:**

- Date of Birth (DOB):** Two date pickers labeled 'After' and 'Before'.
- Location:** Two text input fields labeled 'District' and 'DBN'.

**Activity Section:**

- Status:** A single-line text input field.
- Process Type:** A dropdown menu.

At the bottom of the pop-up, there are two buttons: 'Clear Filters' on the left and 'Show Results' on the right. Both buttons are highlighted with black rectangular boxes.

9. Click the **X** on the top right of the **Filters** pop up to close the **Filters** pop up.
10. A more detailed **Activity** status search is available within the **Filters** pop up. You can select from various statuses across process stages such as pending states.

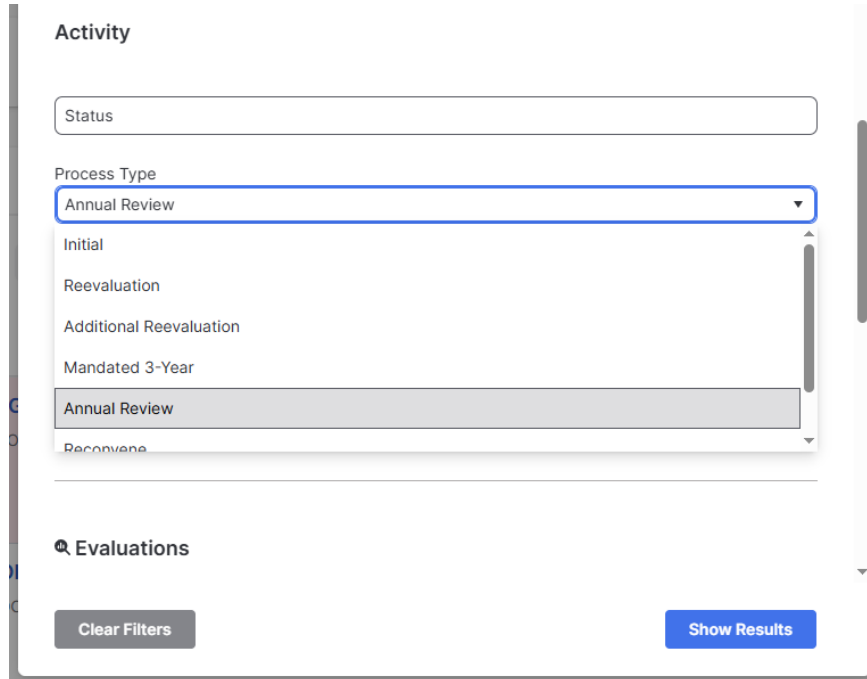
This screenshot shows the 'Filters' pop-up window with the 'Activity' section expanded. The 'Status' dropdown menu is open, displaying a list of activity statuses. Below the list, there are five filter buttons: 'Out of Compliance', 'At Risk', '30 Days', '45 Days', and '60 Days'.

**Activity Section:**

- Status:** A dropdown menu with the following options:
  - IEP: Meetings pending scheduling
  - IEP: Documents Pending Finalization
  - Placement: Pending Consent for Initial Provision of Services
  - Referral Draft
  - Referral Review
  - Referral Pending PWN

Below the status list, there are five filter buttons: 'Out of Compliance', 'At Risk', '30 Days', '45 Days', and '60 Days'.

11. Use the **Process Type** dropdown, to filter by Process Type. For example, selecting **Annual Review** will return all students awaiting their annual review. Users can then search for a student that they know is awaiting an annual review.



**Activity**

Status

Process Type

Annual Review

Initial

Reevaluation

Additional Reevaluation

Mandated 3-Year

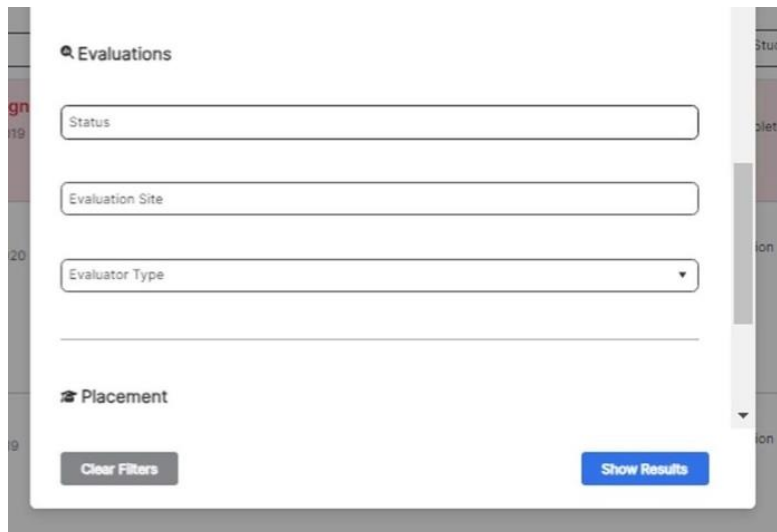
Annual Review

Reconvene

Show Evaluations

Clear Filters Show Results

12. Sort students by *Evaluation Status*, *Evaluation Site*, or *Evaluator Type*.



**Evaluations**

Status

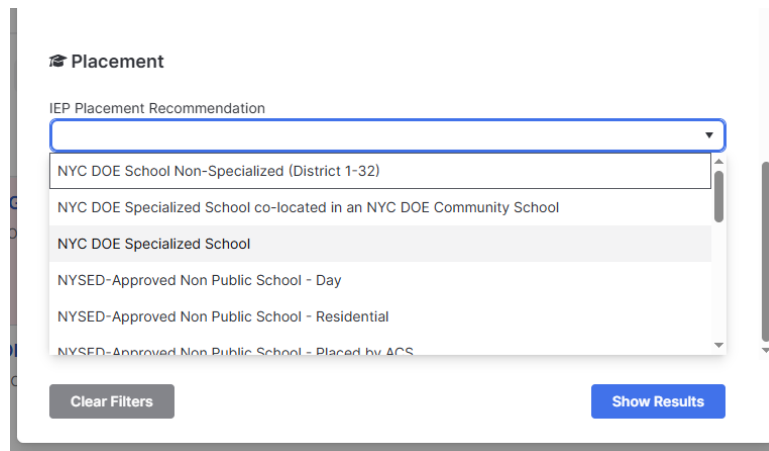
Evaluation Site

Evaluator Type

Show Placement

Clear Filters Show Results

13. Using the advanced filters pop-up, the dashboard can also be filtered by *IEP Placement Recommendation*. After the dashboard is filtered, the user can search for a student in a specific placement.



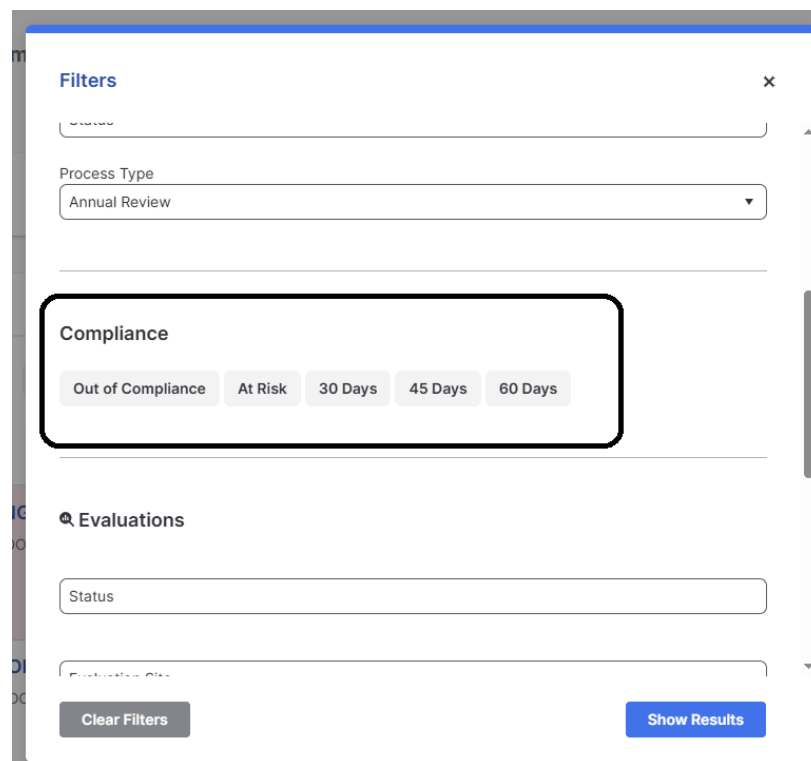
**Placement**

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

**Clear Filters** **Show Results**

14. The dashboard can also be filtered by **Compliance** status. Choosing one of these indicators will show all students who fit the criteria for that compliance status. For example, if the user chooses **Out of Compliance**, all students whose case status is considered out of compliance will show on the dashboard.



**Filters** x

Status

Process Type

Annual Review

**Compliance**

Out of Compliance At Risk 30 Days 45 Days 60 Days

**Evaluations**

Status

Estimated Date

**Clear Filters** **Show Results**